

THE Legal Secretary®

May 2010



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CHRISTA DAVIS
LSI PRESIDENT

Christa Davis is President of Legal Secretaries, Incorporated and a member of Livermore-Amador Valley Legal Professionals Association. Christa started her legal career as a legal secretarial trainee in 1987. She has been working for Staley Jobson, a family law firm in Pleasanton since 1989, where she is currently the Administrator. Christa lives in Castro Valley with her husband and daughter.

Building Membership Though Education

BY CHRISTA DAVIS

I have had the honor of presiding over this prestigious corporation for the past two years and it has truly been my pleasure to do so. But now it is time to pass the gavel. I am still amazed that two years has passed. Where did the time go? It has been a fun and wild ride for me. As do all presidents, I set personal as well as professional goals for my tenure as your president. One of the personal goals I set for myself was that I would have to give it my all, do the very best I could, and give this cor-

of our game, we have to stand ready to take on the challenges of these changes and reach for new goals. Would you be able to accomplish this if it weren't for Legal Secretaries, Incorporated? Of course it is entirely possible, but as a member of LSI, you know you don't have to look far for educational opportunities. Some may argue that the role of the legal secretary has reached an end and the duties and responsibilities are being consumed by the "legal assistant," "paralegal," and even the associ-

"LSI has experienced numerous changes since its establishment in 1934 – the majority of them focusing on education."

poration 100% of my energy. I also wanted to enjoy my term as President, enjoy each conference and encourage everyone to enjoy the conferences as well. While education is of the utmost importance, it is equally important to enjoy yourself and not always take life so seriously.

LSI has experienced numerous changes since its establishment in 1934 – the majority of them focusing on education. We strive for excellence through education with the Legal Specialization Section workshops held each quarter, the local association workshops and of course the CCLS program. These educational opportunities enable us to keep up with the never-ending changes in the law and the legal field. I believe we would be hard pressed to find the quality, quantity and affordable educational workshops that are offered through LSI, anywhere else.

The age of technology challenges every legal professional and has changed the tone and role of the legal secretary. To stay on top

ates. I don't find this to be accurate; in fact, I believe the legal secretary is far from extinct. The duties and title may change, but the role of the legal secretary will never become obsolete. There is always going to be a need for the legal secretary, the skills, knowledge and dedication. Attorneys are always going to need the silent "right hand" – their legal secretary – the person with their finger on the pulse of the office. That role will never diminish and will remain an ever valuable asset to the law firm. Think about how many speakers at the LSI educational programs have mentioned their legal secretary and how they would be lost without them. It is doubtful that a computer, Blackberry, iPad, or associate can replace the legal secretary. For those of us who have been in the legal secretarial field for quite some time, we have been fortunate to have access to vehicles to enhance our careers as legal secretaries, from with the beginning legal secretary courses, to our membership in Legal Secretaries, Incorporated. We are the fortunate ones to realize the

importance of belonging to an organization that allows educational advancement as well as networking opportunities. The newer generation of legal professionals may not see the value of such opportunities...yet...but in time, I am confident they will embrace our purpose, the value of belonging to such an organization through the educational and networking opportunities. That time can come sooner rather than later if we, the members of Legal Secretaries, Incorporated, educate those around us of the value of membership in LSI, the value and importance of continually advancing our education, and of course, the value of forming friendships and networking. Excellence in Education. There isn't much more that needs to be said.

It has been my pleasure to serve as your president over the past two years. I would like to extend my personal thanks to the members of LSI for having the confidence in me to preside over this prestigious corporation. My sincere gratitude to the 2008-2010 Officers and Chairmen for their hard work, dedication, and the willingness to say yes when I asked if they would join the board. They are the ones who truly keep this organization moving forward. This has been one of the most rewarding and challenging experiences of my life. I urge everyone to step outside their comfort zone and enhance your personal and professional life by becoming more involved. It may be one of the biggest steps you take, but it also may be one of the most important. **LS**

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BROOKE ATHERTON
LSI VICE PRESIDENT

Brooke Atherton, is a member of Butte County Legal Professionals Association and currently serves as LSI's Vice President. She has served her local association as Governor, Secretary, President and various other chairman positions. Brooke is the office manager/paralegal at her husband's law office in Paradise, California. Brooke also knits for Socks for Soldiers and is a member of Blue Star Mothers.

How to Market Your Association(Part II)

Part I appeared in the November 2009 issue of The Legal Secretary

BY BROOKE ATHERTON, CCLS

Now that your LSI toolbox is well stocked, you are ready to hit the road and market your association. I have been asked several times in the past two years how we can attract the "younger generation" to the legal field. Let's face it, "old timers" want to retire one day and who will take their place. We need to be where that "younger generation" is. The answer can be found, in part, in our Eula Mae Jett Scholarship Plan. If you visit our website, www.lsi.org, and click on "Scholarship," you will find information on the program and links to forms. Plan A is for College Students and Plan B is for High School Seniors. Plan C is for Re entry. So, where are we going to find "the next generation" of legal support staff? I think many can be found on our High School and Community College campuses.

Contact your local High Schools and Community Colleges and invite your association to attend any Career Day type of events. Ask to speak to a guidance counselor and see if he or she is willing to keep a supply of magazines on hand, as well as information on the Eula Mae Jett Scholarship Program. Many campuses offer ROP (Regional Occupational Program) to their students and to adults seeking to re enter the workforce. Contact the instructor and offer to come in and speak to the students about the legal field.

Unfortunately, too many people find themselves "between opportunities" and are looking for work. We need to be visible where the unemployed are. Visit your local placement agency, EDD or other personnel services and ask if you can leave information packets regarding your local association and LSI. Don't forget to include information about our scholarship program, specifically the re entry program.

These are just a few ideas all found by

reviewing the Eula Mae Jett Scholarship information on the website.

Going to events like Career Day or attending a school event during office hours takes manpower and may not be ideal for everyone. Your boss may not be too keen on having you out of the office when you could be working. You could, of course, invite your boss to tag along and ask him or her to share their experiences of going to law school and working in the legal field. Your boss can share his or her viewpoint on the importance of qualified individuals entering the legal field.

It would be far better for new members to come to you, right. "Great idea!" you may be asking yourself. How do we do it. The answers can be found in our tagline "LSI Educating California's Legal Professionals" and our motto "Excellence Through Education." What is the one thing these two lines have in common? EDUCATION. I feel confident that if your association offers educational speakers at your monthly meetings and if your association holds at least one educational seminar or workshop each quarter, you will increase your membership and you will see membership retention.

Do not get weighed down by negativity. We have all heard "We've done that before and it did not work." Just because you tried something once and you think it "failed" does not mean it can't be successful again. Learn from the mistakes. What went wrong the last time you held a seminar or workshop. The biggest complaint I hear is lack of attendance. One cure for that is to make sure the next time you promote your event in a wider circle. If you simply include a flyer in your monthly bulletin and cross your fingers for a full house, you are setting yourself up for failure. Planning ahead is essential.

Coordinating a seminar is similar to scheduling a deposition and most of us have done that a few times in our legal careers. First, who are the parties. You'll need at least one speaker and of course your students. Next is date and time. You may be at the mercy of your speaker's schedule on this element. Now that you have your speaker, their schedule of availability, you'll need to find a location. If your speaker's law firm has a large conference room or library you may be in luck. How about your law firm or someone else in the association. If not, check with your local law library, public library, courthouse, law school, or your deposition reporting firm.

Coordinating the availability of a site for your workshop and the speaker's schedule can be tricky, but just like scheduling a deposition, it can be done. Next item on your agenda is giving your notice or publicizing your event. Give yourself at least 2 months time to promote your event. Depending on who your speaker is, ask if their firm can circulate flyers to their employees. If you are holding your event in a public building such as law library, ask if you can post flyers. Ask your courier service or process server if they will distribute flyers to other law offices.

Most papers have a community calendar section where you can include a brief announcement. Of course, you do not want to forget about those high school and college students. If your workshop is an entry level topic, be sure to include them in your promotional efforts. A more detailed outline of conducting seminars and workshops can be found in our publication *Guidelines for Preparation of a Legal Educational Program* and the cost is only \$5.

Finally, remember that the officers and chairmen of LSI are here to assist you. If you need help in how to put together a workshop, seminar or how to properly provide MCLE credits, we are here for YOU!

President Christa Davis has used the expression "stepping outside our comfort zone" this past year. I challenge you to step outside your comfort zone and plan a new educational program for your association. Good luck to you in your efforts to educate California's legal professionals and to your success in providing excellence through education! **LS**

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Friday, May 21, 2010 – 1:30 pm to 3:30 pm.

TRANSACTIONAL LAW: "Patents & Trademarks"

Speaker: John P. Costello, Esq. – *Costello Law Corporation*

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Send to: Mae Brooks, CCLS, Transactional Law Section Leader
 1050 S. Kimball Road, Ventura, CA 93004
 (H) 805-642-6478 (O) 805-659-6800 FAX: 805-659-6818
 Email: mbrooks@fcoplaw.com

CRIMINAL LAW: "Sentencing Alternatives"

Speaker: Dayle C. Carlson, *Correctional Consultant*

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Send to: Cheryl Kent, PLS/CCLS, Criminal Law Section Leader
 5534 Blackbird Drive, Pleasanton, CA 94566
 (H) 925-462-3440 (O) 925-837-0585 FAX: 925-838-5985
 Email: clkcls@comcast.net

Friday, May 21, 2010 – 4:00 p.m. to 6:00 p.m..

LAW OFFICE ADMINISTRATION "Disaster Preparation & Relief"

Speaker: Robert Persons, Esq. – *Persons & Miller*

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Send to: Jan Vornkahl, Law Office Administration Section Leader
 63 Gazania Terr., Fremont, CA 94536
 (H) 510-565-1458 (O) 415-984-8341 FAX: 415-226-0735
 Email: jvornkahl@nixonpeabody.com

FAMILY LAW "Calculating Support & Hardship Deductions"

Speaker: Valerie Miller, Esq., *Persons & Miller*

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Send to: Stephanie Harrison, Family Law Section Leader
 c/o Law Offices of Marvin J. Brown
 720 West 19th St., Merced, CA 95340
 (H) 209-723-4479 (O) 209-384-0123 FAX: 209-384-1661
 Email: stephmjb@sbcglobal.net

Saturday, May 22, 2010 – 4:00 p.m. to 6:00 p.m.

PROBATE & ESTATE PLANNING & LITIGATION JOINT SEMINAR: "Wills & Trusts Litigation"

Speaker: Tracy Potts, Esq. - *Legacy Law Group*

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Send to: Leslie Ames, CCLS, Probate/Estate Planning Section Leader
 4248 Crestview Place, Eureka, CA 95503
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 Email: eurekalaw@aol.com

CIVIL LITIGATION & PROBATE JOINT SEMINAR: "Wills & Trusts Litigation"

Speaker: Tracy Potts, *Legacy Law Group*

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Send to: Elizabeth Adame, CCLS, Civil Litigation Section Leader
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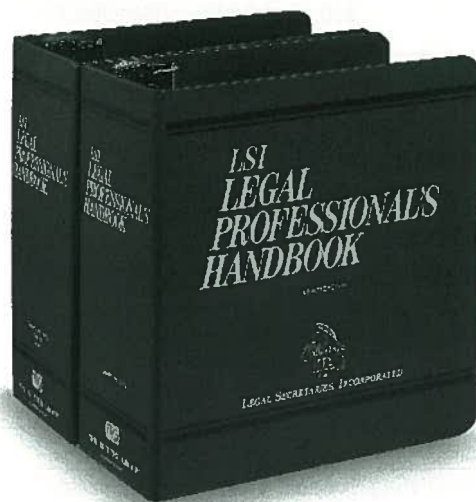
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The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these workshops have been approved for minimum MCLE/CLE credit of 1.75 hours each, by the State Bar of California.

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The Unspoken Benefit

BY LUGENE M. BORBA, CCLS—SUBMITTED BY STANISLAUS COUNTY LPA

There have been many articles about the benefits of belonging to Legal Secretaries Incorporated and each of those reasons is great . . . networking, legal education, camaraderie with other legal secretaries, life-long friends, among other benefits. But there is one benefit which has never been spoken of.

Since 2006, I have been a beneficiary of this benefit four times.

My father died in 2006, and when I got home from Washington state there were tons of cards expressing concern for me and my family and letting me know that my SISTERS

Unfortunately, on Christmas Eve Ed passed away.

Although this was devastating for me, my SISTERS IN "LAW" came through again. I received so many comforting messages, cards, e-mails, and notes. This again showed me that the people who belong to this organization truly care about each other.

I cannot personally thank each and every one of you who have taken the time to send an e-mail asking how I am . . . those of you who sent sympathy cards expressing your love... those of you who have helped me in more

"I cannot personally thank each and every one of you who have taken the time to send an e-mail asking how I am ..."

IN "LAW" were thinking of us.


In 2008, I again had to make an emergency trip to Washington state when my brother had a matter of hours to live. During the time I was in Washington, I received numerous phone calls, e-mails, and messages expressing concern. When I got home after he passed away 10 days later, there were tons of cards expressing the hope that he would get better and then days later the cards came in expressing sympathy. Again, my SISTERS IN "LAW" were expressing their concern and love for me and my family.

In November 2009, my mother-in-law passed away and again my SISTERS IN "LAW" came up to the plate and Ed and I received tons of sympathy cards.

In December 2009, the worst of all things happened when Ed suddenly became ill and was rushed to a San Francisco hospital. I received telephone calls, e-mail messages, and notes with the hope that Ed would rally out of this illness and everything would be okay.

ways than I can express. Please be assured that each card received was appreciated and read to its fullest.

How many times have you or your governor received an e-mail from Corporate Office advising that one of your SISTERS IN "LAW" is ill or has someone in their family become ill and you think I will send a card and then never do it. Although, no one wants to have to send a sympathy card, I can only encourage you that when you receive that e-mail from Corporate Office, please take the time to send that card. It does not matter what is said, it is the thought that counts. It truly is appreciated by the recipient and it does bring some comfort to that person.

Every member of this association is lucky to have so many SISTERS IN "LAW." To each of you - I say THANK YOU!!!! 



LUGENE BORBA

Lugene M. Borba has been a legal secretary for 20 years and is currently employed with Arata, Swingle, Sodhi & VanEgmond in Modesto. She has been a member of Stanislaus County Legal Professionals Association for the past 13 years. She has been a member of the Publications Review Committee for 7 years and has served as the Editor of the Law Office Procedures Manual, the Editor of the Legal Professionals Handbook, and this is her first year as the Editor-in-Chief of the committee. She can be reached at luccls@hughes.net.



LAURIE HARROLD

Laurie R. Harrold is a staff attorney for State Farm Insurance Company. She has served as President of the Eastern Bar Association, board member of Mount San Antonio College, paralegal advisory committee, member of Los Angeles County Superior Court bench and bar committee, voluntary settlement officer at Los Angeles Superior Court, and member of American Board of Trial Advocates-Associate.

Uninsured Motorists of California

BY LAURIE R. HARROLD, ESQ.—SUBMITTED BY MERCED COUNTY LPA

What You Need To Know and What You Need To Do To Protect Yourself and Your Family.

FAST FACTS:

Uninsured drivers in California are on the increase due to the economic downturn. The economic downturn may have pushed the number of uninsured drivers on the road to an all time high. Experts say the number of those drivers had increased an alarming rate according to a study by the Insurance Research Council. California ranks seventh in the country on the list of the most uninsured drivers with a whopping 18 percent of drivers hitting the road uninsured. It also should be noted that there are many people that are underinsured, that breaks down to about one in five California drivers without insurance.

WHAT ARE UNINSURED MOTORISTS?

WHAT IS AN UNDERINSURED MOTORIST?

The uninsured motorist is a person who has no auto insurance. An underinsured motorist is someone that is driving on the road but with the minimal limits, typically \$15,000.00, which is the minimal amount of liability insurance required by law. Typically, uninsured motorists or underinsured motorists drive the most unreliable and unsafe cars and sometimes are the least careful of drivers. Again, one out of every two car accidents is caused by an uninsured or inadequately insured driver.

WHAT IS UNINSURED MOTORIST COVERAGE?

Uninsured (including underinsured motorist coverage) is part of almost every automobile policy sold in the State of California. Your own insurance policy is designed to compensate

you for an accident, which you sustained and which is caused by a driver who is uninsured or underinsured. Your insurance company is required by law to include uninsured motorist coverage as part of every automobile policy that is written unless you specifically decline it in writing. You can look for, on the face page of your declaration page of your automobile insurance policy, the letters U or UM and this usually designates that this is your uninsured motorist coverage. Again, this coverage can be declined or the reverse, you can have high limits of coverage that protect yourself and your family.

WHO IS INSURED BY YOUR UNINSURED MOTORIST POLICY?

Uninsured motorist coverage under your policy covers you and all members of your family who reside in your home with you. The coverage also includes any minor children of yours who do not reside with you or your children who are away from college. You do not have to be an automobile driver or passenger in order to be eligible for the coverage. Your automobile uninsured motorist coverage applies even if you were a pedestrian, bicyclist, motorcyclist, or bystander so long as the motorist who caused your injuries was uninsured or underinsured. The coverage also applies to passengers in your car or other people driving your car who are injured. There are also provisions that protect your car property damage. The property damage provisions are called underinsured motorist property damage coverage. Generally, for property damage coverage you have to

select this type of coverage. When hit by an uninsured motorist, you must get identification, usually a license plate number of that vehicle. Under the UMPD coverage (uninsured motorist property damage coverage), a property damage deductible will be waived if you have the identification of the vehicle that hit you.

WHEN DOES AN UNINSURED MOTORIST POLICY APPLY?

Uninsured motorist vehicle coverage will cover you whenever anyone who is insured is injured by a driver who is uninsured or underinsured or does not have enough insurance to pay for the damages that person caused in the automobile accident. You should note that this includes hit and run drivers but there must be actual contact between the vehicles involved in the auto accident. If there is no contact between the vehicles then there is no coverage under your uninsured motorist. Other types of coverages such as medical payments coverage or coverage that were paid out by the underinsured vehicle typically offset coverages under your policy. These different coverages will be offset under your policy limits.

PROTECTING YOUR FAMILY AND YOURSELF

Uninsured motorist coverage is intended to cover and protect you and your family from uninsured motorist or underinsured drivers and can be compensated for medical treatment and expenses, loss of earnings, and pain and suffering. I cannot stress enough that this protection protects you and your family, and it is important that you consider your limits under your uninsured motorist policy since it is for your protection and your family's protection against either uninsured motorists, hit and run motorists, or underinsured motorists.

HOW MUCH COVERAGE DO YOU NEED?

Since you want to protect you and your family, you should discuss this with your insurance agent or insurance professional. If you have medical insurance, your own personal medical insurance will cover many of your own medical bills. Therefore, you may not need medical payments coverage. However, you do want coverage for yourself and your family that will adequately protect you against the uninsured motorist or underinsured motorist. Like all insurance, if a loss occurs, the higher the limit the better, the more protection your family has. However, this is always guided by the amount of money you can afford to pay under your insurance policy. Again, I would recommend you discuss this with the appropriate insurance professional, either an insurance agent or your insurance company, about how much coverage you actually need to protect yourself and your family.

WHAT SHOULD I EXPECT IF AN UNINSURED MOTORIST HITS ME?

If an uninsured motorist hits you, you want to immediately report the automobile accident to your own insurance carrier.

Anything your own insurance carrier pays out will subrogate against the uninsured motorist or underinsured motorist portion after your claim is settled. You can work with your insurance company to resolve the claim or you can choose to go to an attorney who will represent you.

INSURANCE UNDERINSURED CASES ARE CONTRACTUAL

Because underinsured cases are contractual between a contract with your insurance carrier and yourself, there is a provision under your insurance contract that the case will be resolved through arbitration and/or mediation but the case will not be litigated in front of a jury trial. A professional arbitrator will be chosen by both sides and agreed upon. If both sides cannot agree upon an arbitrator to arbitrate the matter for resolution, then the parties can have the option of filing a case in court and having the court assign an arbitrator. Usually both sides submit a list of professional arbitrators to the court and the court will pick an arbitrator. The case then proceeds to binding arbitration. The parties mutually agree on a date for the arbitration hearing. The arbitration hearing is often like a mini trial. There will be opening and closing statements. Both sides will present briefs. Very often, the parties will bring live witnesses. Sometimes there is a dispute as to how the accident happened; the insurance company can subpoena the uninsured or underinsured motorist to the hearing so they can testify at the trial. Both sides share in the cost of the arbitration hearing. The arbitrator usually renders a written award that is given to both parties. The arbitration proceeding is governed by Insurance Code section 11580.2e. This section provides for the provisions for the arbitration and the rules for the arbitration. In addition, Rules of Evidence also apply. Finally, if it is deemed that your insurance company wrongfully denied or did something wrong in the arbitration hearing, the remedy for that is a bad faith lawsuit. Bad faith lawsuits usually proceed in federal court. They can be filed in state court but the insurance carriers generally move them to federal court. There would then be a jury trial most likely on the issue of bad faith if your insurance carrier did anything improperly in its litigation or handling of your uninsured motorist claim. Also applicable to the uninsured motorist law is the Fair Claims Practices Act. The California Unfair Claims Settlement Practices Act sets out how all claims by insurance carriers should be handled.

PRACTICAL TIPS

When you are involved with an uninsured motorist, it is important to do the following things:

1. Get a driver's license number and the vehicle's license tag. Very often, when you are involved in an automobile accident with an uninsured or underinsured vehicle, especially an uninsured vehicle, the motorist may give you incorrect

information. It is always a good idea to get identification such as a driver's license and the vehicle license tag when you are involved in an accident.

2. If the motorist admits that they are uninsured call the police and ask for a police report. Even though there may not be an injury or you think you do not know if you are injured or not at the time of the accident, it is a good idea to call the police and request a police report. The police should, under their authority, cite (give a traffic citation) to the uninsured motorist. Driving in the state of California without automobile insurance is a violation of law. The uninsured motorist will have their license suspended and their car impounded as a result of driving without insurance. This is the benefit of everybody in California getting the uninsured motorists off the road that caused an automobile accident. So feel free to call the police and report the automobile accident.
3. If you have a cell camera phone or a camera in your car, take photographs. Take photographs of the scene and the damage to the vehicles involved in the accident. This is helpful in litigating your claim sometime down the road. It is helpful in terms of establishing liability (fault) for the accident and it is helpful in establishing to identify the parties involved in the accident, the cars involved in the accident, and where the property damage is located on both vehicles.
4. Report the claim as soon as possible to your insurance carrier. Give your insurance carrier all the information early on, including whether you took photographs or not. Print out the photographs and save the photographs. Do not destroy them. I have had many clients over the years that have taken photographs with their cell phones and two years down the road, they do not have the cell phone anymore. They buy a new cell phone and the photographs are gone. If you can download the photographs and save them, it is helpful in case there is ever any litigation surrounding the automobile accident.
5. Talk to your agent or insurance professional about what insurance coverages you do have that protect you under your insurance policy, especially uninsured motorist coverage. Again, uninsured motorist coverage protects you and your family against the uninsured driver. In addition, I cannot stress this enough that you need to think about what protection you need to protect you and your family against the uninsured motorist on the road. **LS**

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These Shoes are Made for Walking!

BY JULIE EDSILL, CCLS AND ASTRID WATTERSON, CCLS

Butte County LPA and Sacramento LSA are extremely excited to host the Annual Conference May 20, 21, 22 and 23, 2010. We have worked hard to make sure that your experience will be enjoyable if not memorable.

As most of you know, Butte County LPA is from Chico and Sacramento LSA is from Sacramento. Our associations unanimously agreed that choosing a site for this conference needed to be easily accessible to everyone. With that in mind the only choice that made any sense was to host this conference at the Hilton Sacramento Arden West. This hotel is approximately 11 miles from the Sacramento Airport, approximately 9 miles from Greyhound and Amtrak, a little over an hour from Modesto and approximately 90 minutes from San Francisco. The Arden Fair Mall is just a few blocks away where you can find numerous restaurants and stores. The cost to attend this conference is affordable too. The early scrip ticket is only \$115 if paid by April 20, 2010, which includes your registration, Friday night reception, Saturday night banquet and Sunday brunch. The rooms are reasonably priced at \$119 per room for a single or double occupancy, plus room tax and tourism assessment. You can choose between two double beds, or a King bed.

We hope that you plan to attend the various educational workshops that the Legal Specialization Sections are planning for you. The workshops will be outstanding to say the least, with the Specialization Section Leaders going above and beyond to schedule topics that not only will interest you, but will also help you in your day-to-day application of work duties.

With great anticipation of the 2010 annual conference, we have chosen our theme carefully and hope that it is met with enthusiasm and fun. In honor of Brooke Atherton, CCLS, who will be installed as LSI's President on Sunday the entire weekend will be about Shoes! Friday night's reception theme will be

"shoe trivia" - so strap on your most outlandish shoes and come ready to participate in all sorts of mind bender shoe trivia, while you network and visit with more than two dozen exhibitors set up for your benefit. Do not forget to bring plenty of business cards to drop in each of the exhibitors separate raffle drawings. As for Saturday night's banquet, we hope you come dressed for Jazzmataz evening with all the glitz and glamour that you want. Keep in mind shoes is the theme, so join us and show us those beautiful and unique shoes!

Sunday brunch will be "Springtime Sling Back." Come dressed as if you are taking your first Spring walk. You will be dazzled with an array of shoes that you won't believe could exist in one closet. The highlight of this event will be the installation of the 2010-2011 Executive Committee and the announcement of the new Chairmen.

Since there is so much to see and do in Sacramento, why not plan on making this a family vacation as well. You can come early or stay a day or two after the conference so you and your family can enjoy all that Sacramento has to offer.

Among some of the attractions that Sacramento has to offer, and which are relatively near the hotel are: the California State Capitol Museum; the State Railroad Museum; the Arco Arena; Discovery Museum of Sacramento; the Old Sacramento historic district is only a few miles away; and of course, the Arden Fair Mall. As a matter of fact, the hotel offers a shuttle to the Arden Fair Mall, so you can shop to your heart's delight!

Butte County LPA and Sacramento LSA are proud to host this conference and are excited to present an extraordinary conference that not only will be educational, but entertaining as well. So mark your calendars and make your reservations soon so that you do not miss out on what we hope will be a memorable annual conference. **LS**



JULIE EDSILL
May Conference Chair

Julie Edsill is 2010 Annual Conference Chair for Butte County Legal Professionals Association. She is currently employed by Persons and Miller, a law firm practicing family law, civil litigation, corporate law, estate planning, personal injury and contract law. In March 2005, Julie obtained her CCLS and served on the CCLS Certifying Board for the term of 2006-2010. She was hired last Spring to teach the Legal Office Procedures class at the local Junior College.



ELICIA ALLEN

Elicia Allen is a member of Sacramento County Legal Secretaries Association. Elicia is the immediate past president and currently serving as Governor, Historian, Charitable Projects Co-Chair, Day-in-Court Co-Chair and Budget Co-Chair. Elicia is a Paralegal at the Law Offices of Todd A. Murray. She received her A.A.S. in Paralegal Studies at MTI College of Business and Technology. Elicia also teaches Introduction to Paralegalism, Ethics, Client Interviewing and Investigation at MTI College.

Are You Giving Back to Your Community?

BY ELICIA ALLEN, CCLS— SUBMITTED BY SACRAMENTO LSA

"You will find, as you look back on your life, that the moments that stand out are the moments when you have done things for others." —Henry Drummond

I am very proud of Sacramento LSA's accomplishments when we look back on the past three years and the lives we have touched, not only in our legal community, but also our community at large. As we continually strive to meet our goals as productive members of LSI, our local association, and as legal professionals, it seems like it leaves us little time to think about volunteering for community projects. But busy schedules do not mean we have to write off community involvement. You and your association can make a difference in the community.

So what have we been doing to reach out to the Sacramento community? We asked our association and the legal community to "Paws for the Cause," where we collected old blankets and towels that were donated to the Sacramento County Animal Care & Regulation. There is nothing so appreciated by a dog or cat who is confined to a concrete holding area, than an old blanket or towel to curl up on. In addition to the overwhelming amount of blankets and towels that were donated, we received kongs, toys, treats, leashes and lots of other much needed and appreciated items for the shelter.

For the past year, Sacramento LSA has committed to assist the Sacramento Food Bank and Family Services handing out food to needy families and individuals the last Saturday of every month. We are stationed bright and early Saturday morning in the parking lot of a church. It is estimated that the organization and its volunteers pass out food to over 600 individuals each Saturday morning.

And all too often when volunteers pull up to the parking lot, people are already lined up and waiting to get some much needed food. Food is provided by several grocery stores and includes meat, boxed pasta and canned goods, produce, breads and pastries and dairy products. I think I can speak for all of the Sacramento LSA volunteers who wake up and go outside those early cold mornings, when I say we walk away with feelings of happiness and sadness, and are humbled, but are thankful for the great experience and the gratitude of those that we met.

We are currently looking forward to our second year of assisting Project R.I.D.E. with its Annual Crab Feed. Project R.I.D.E. is a great organization that provides special-needs children with physical therapy by allowing them to ride horses, which can often provide not only physical relief on their bodies, but also emotional relief for the children and their families. The goal of Project R.I.D.E. is to improve a rider's physical, emotional and social functioning through participation in a highly structured and safe program. Riders' interaction with carefully selected and trained horses improves their balance, posture, flexibility, sensory awareness and endurance, in addition to increasing confidence, self-esteem, self-discipline, motivation, attention span and integration with non-disabled peers. The Annual Crab Feed brings in the funds that the organization needs to continue to provide the essentials for the organization. Sacramento LSA assists Project R.I.D.E. with the crab feed by setting up tables and chairs for the estimated 1,800

attendees, sweeping up sawdust, moving around hay for display, and folding programs. At the January 2010 Project R.I.D.E. crab feed Sacramento LSA will be hostesses and work on getting all attendees seated.

For a number of years, Sacramento LSA has collected items of need and items of want for the Mustard Seed School Holiday Drive. The Mustard Seed School provides schooling to those children living in the Loaves & Fishes Homeless Shelter. Children living in the shelter often cannot attend public schools as they do not have immunization records and/or a home address, which is needed to enroll in school. Mustard Seed School puts together a wish list and passes this wish list along to us. Items seen on wish lists include socks, shoes, pajamas, a doll, board games, just to name a few. Sacramento LSA turns the wish list into a flyer and donations drops are established, as well as bringing donations to our monthly dinner meetings. We also provide the convenience for any one that wants to write a check and a volunteer will go out and purchase items for the children. All of the unwrapped donations are then brought to the Mustard Seed School for distribution among the children.

On any given night in Sacramento, almost 2,500 people are homeless. 1 out of 5 homeless people are part of a household with dependent children. The Volunteer Center of Sacramento and the Sacramento Area Emergency Housing Center came together to start an amazing and worthwhile project called Birthday Wishes. Sacramento LSA is a proud Birthday Party Buddy. Sacramento LSA provides funding to hold a very special birthday party for children who are living in emergency housing

during the month we sponsor. This is all too often a birthday that none of the children have ever experienced before, including having a birthday cake, crafts, entertainment, and a few presents. Sounds like your typical birthday right, but for most of these children it's much, much more.

And of course, Sacramento LSA's nine years of support of Fairytale Town's Safe & Super Halloween. Fairytale Town is a 2.5-acre children's play park and outdoor children's museum that brings fairytales and nursery rhymes to life. Each year, the weekend before Halloween, Fairytale Town transforms into a magical trick-or-treating haven. Sacramento LSA volunteers not only dress up in theme and pass out thousands of pieces of candy each night, but also assist the kids with arts and crafts projects including pumpkin and ghost hand puppets, as well as coloring sheets and googly-eye spider thumbprints for the younger children. Sacramento LSA has its own station, must provide its own candy, and chooses to provide the arts and crafts. All of the items for this event are contributed by Sacramento LSA's members. These causes are just a few of the charities/organizations Sacramento LSA supports. Additionally, we held a book drive and sale to benefit the Make-A-Wish program and the Sacramento Children's Home, Raced for the Cure in breast cancer awareness, and made a donation from Sacramento LSA's treasury to the Children's Receiving Home of Sacramento.

Won't you join us? I challenge your association to evaluate your community and work to improve the lives of others. **LS**



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TOM PFEIFF

Tom Pfeiff is an attorney practicing in Merced, California with the law firm of Morse & Pfeiff. He received his Juris Doctor in 1986 from California Western School of Law in San Diego and his Bachelor's Degree from Illinois State University. He worked as a prosecutor in the San Diego City Attorney's Office and the Madera and Merced County District Attorney's offices. Tom primarily practices in the area of criminal defense.

Representing the "Unattractive" Client

BY TOM PFEIFF, ESQ.—SUBMITTED BY MERCED COUNTY LPA

When I was approached about writing an article for this publication by my legal secretary and office manager I was initially hesitant. I don't spend much time reflecting about my job or the people with whom I interact. I was at a loss for ideas. Luckily for me my secretary was also able to provide me with fertile subject matter. The topic, representing the "unattractive" client and to put more

something like, "Hey did you see that guy in the newspaper this morning who shot his best friend because they were arguing about whether Sebastian Janikowski is the greatest Raider ever? Well I met him in a bar the other day and he seemed like a real peach of a guy." **DISCLAIMER:** This writer does not condone absences from the office for this type of outing.

Charming as most of my clients are, there

"After practicing law for more than 23 years I can honestly say that I have genuinely liked, or at least gladly tolerated the vast majority of the thousands of clients I've represented."

directly, representing the client you hate.

After practicing law for more than 23 years I can honestly say that I have genuinely liked, or at least gladly tolerated the vast majority of the thousands of clients I've represented. Many people are surprised to hear that I like most of my clients, particularly since my practice consists primarily of criminal defense work. My clients are murderers (allegedly), rapists (allegedly), child molesters (allegedly), drug dealers (allegedly), drunks (usually), and other miscreants. The thing is, on a one on one basis, most of these people are pretty much like the rest of us. Many are intelligent and friendly, others are desperate and sad. Most are cooperative and pleasant. Nearly all are a combination of all of these. If you pulled up a bar stool next to one of these guys (or occasionally girls) you would probably enjoy their company and later tell your friends what a nice guy/gal you met the other day while drinking instead of working. Of course you might say

are some whose company is difficult to enjoy. For purposes of this article I have arbitrarily, unscientifically and unreliably categorized these unlikable characters into four categories. Perhaps they will sound familiar.

NUMBER 1: THE ANGRY CLIENT

The Angry Client is a victim and his attorney is not doing his job. If he was doing his job the angry client would not be in jail (or on his way). The fact that the attorney (and his staff, God bless 'em) bend over backwards to placate the Angry Client by repeatedly providing copies of the same documents, frequent meetings and phone conferences and sleepless nights figuring out what to do for the Angry Client only proves how incompetent the attorney really is because if the attorney can't get Angry Client out of this jam after all this effort he really must be exceedingly incompetent.

If, after months of litigation, negotiation and other legal wrangling attorney is success-

ful, Angry Client is not grateful or appreciative because that's what should have happened months ago. In Angry Client's eyes attorney and everyone associated with him is an idiot.

NUMBER 2: THE GREEDY CLIENT

The Greedy Client I am describing is not greedy in the traditional sense of wanting more money all the time (although there is such a beast being studied as we speak but it is premature to publish any observations or conclusions). This client is greedy for the time, attention and services of the entire law office. The Greedy Client is also sometimes referred to as the "cheap" client. The Greedy Client hires an attorney for, say, a DUI. During the initial consultation the Greedy Client casually brings up the notion that he may need a will.

Later in the week Greedy Client calls attorney's office to speak with attorney, his secretary, or his receptionist about his sister's divorce because her lazy lawyer isn't doing anything and what does the attorney think should be done. And, oh by the way, how much would a simple will cost and couldn't that be thrown in with the cost of the DUI because after all attorney is charging a fortune for that and that's really a simple matter. And would attorney give his sister a call. She just has one quick question.

NUMBER 3: MANIPULATIVE/SLIMY

These clients initially appear as the large majority of nice, likeable guys who walk through the door (or call from the jail) with the exception of something that you can't quite put your finger on. Maybe it's that he's a murderer (allegedly). The Manipulative/Slimy client is earnest and sincere and often apparently passive. They are also shocked, shocked! that someone would ever accuse them of anything untoward let alone anything as heinous as _____ (fill in blank with your choice of crime against persons, property or nature).

The Manipulative/Slimy client is convinced that if he only has the chance to explain himself to the proper authority and also have all witnesses eliminated it will be clear to everyone that he is innocent. Innocent I say!

It doesn't take long for attorney and his staff to figure out that the Manipulative/Slimy client is manipulative and slimy.

NUMBER 4: PATHOLOGICAL/PERSONALITY DISORDERED

It is important to note that I am a highly educated professional. I have been practicing law for over 23 years. I have a Bachelor's Degree in Political Science and even accidentally minored in sociology. I hold a Juris Doctorate from an institution accredited by the American Bar Association. Impressive as are my credentials I have no idea what the terms "pathological" or "personality disordered" mean. I have heard the terms used in intelligent conversations in which I was not a participant and they sounded really interesting so I decided to use them here as if I knew what

they meant. I can not stress enough that I do not know what I am talking about.

The Pathological/Personality Disordered client will lie to your face. In my experience it is unclear whether this client knows he is lying as he may have convinced himself that the lie is the truth and the truth is a lie. After all, he knows he is a morally superior being and therefore he would never lie, unless of course it is necessary.

This client is adaptable. If incontrovertible evidence exists that contradicts the Pathological/Personality Disordered client's version of events the client's memory can conveniently and quickly be refreshed so that his story can change sufficiently to adapt to the incontrovertible facts. As to evidence that may be harmful to this client's case, it is concocted and the witnesses are liars and are out to get him for reasons unknown or unfathomable to the client. Or because they are jealous or they want his money or they never liked him. A typical conversation with this client might go something like this:

Attorney: So you previously told me you were moose hunting in Canada at the time of the murder but this video from the gun shop next door to the crime scene clearly shows you buying a .38 caliber handgun five minutes prior to the shooting.

Client: I'm sure I said I was in California but if I said Canada it was because I've been watching so much curling during the Vancouver Olympics. I've got Canada on the brain. And I didn't say I was moose hunting I said I was thinking about a documentary I saw about moose. Why would somebody doctor that video to make that look like me?

The Pathological/Personality Disordered client is often friendly and cooperative at first. But when things aren't going his way, watch out. They have tempers and have no problem making baseless accusations of incompetence or worse. But don't worry. Just as quickly they'll calm down and be your best client again.

Over the last 23 years I have been a prosecutor, civil litigator and criminal defense attorney. I've dealt with clients through divorces, bankruptcies and injuries. Often attorneys and their staff see clients at the lowest times of their lives. Through it all I've learned that criminal defendants, like civil litigants, are a varied lot. Some are nice, some are not. Some are honest, some are not. Some are jerks, most are not. Mostly they all need a helping hand and it is our job to give them the guidance they need to get through the legal process whether we like them or not.

By the way, would you talk to my cousin who just got a ticket and he wasn't even speeding... **LS**



JACK LAMP
LSI Honorary Member

Jack Lamp is a retired active senior, is a Commissioner for the City, Ambassador for the Senior Community Center Homeowners Association, honorary life member of the Pasadena Tournament of Roses and LSI honorary member. Jack and Nancy have been married for 61 years and live in Arcadia.

A Step in the Right Direction

BY JACK LAMP

During my visit at the Long Beach Convention, I was asked by many members what I thought about the much discussed possible state organization Name Change. Although I have not been involved in any committee or board discussions regarding this subject, I have stayed on top of it through some personal contacts and by also reading your publications. I noticed that over half of the articles were submitted by local associations with their names changed.

From my own personal viewpoint, I can say that I have noticed there is certainly a vast conflict of opinion going on within the entire orga-

This is not good for your entire organization and certainly needs to be resolved soon! For over forty-five years, I have had the pleasure of being associated with many wonderful, bright and lovely ladies in the legal profession throughout the state of California. You have always shown me how important this state organization was by "being active" and attending most every function each year. One of the obvious problems that I felt had always affected your movement was your inability to attract a more wider and diversified group of members each year. Your organization seemed to remain surrounded primarily with the legal

"For over forty-five years, I have had the pleasure of being associated with many wonderful, bright and lovely ladies in the legal profession throughout the state of California"

nization revolving around the pros and cons of this subject. There have also been many reasons recently, for lots of your active members not to want to become involved in the much discussed issues regarding the changing of the state organizations name.

Some of your long-time members simply do not want it to be "changed," regardless of any type of good reasons. Whereas some of you newer members have not taken the time to find out the real reasons for this much needed *name change*. Therefore you now have two separate organizations operating under one name, which just seem to split your entire organization, with some locals LSA and some LPA.

office-type secretaries, while the other legal organizations in the state attempted to "cover" most of the "general" legal professions.

This brings to light exactly what has happened to your organization over the past many years. However, now the most noticeable problem has been the conflict of the new Name Change by some of your local Associations throughout the state, while a handful seem to just not want to decide to make that move. This has definitely created a serious "divide" within the many associations and caused some serious problems for the future of the entire organization.

NOW more than ever, is the time for everyone to sit down and try to pull together for one goal. The unity of all of the associations, *under*

One Name, will truly provide a faster and better growth pattern in your membership within a short period of time, believe me! It is a fact, that Legal Secretaries, Incorporated has lost many potential new members recently because of the very use of the word secretary which has become obsolete. Not only is this true in the legal field, but in the entire business world too. We hardly ever hear the word "secretary" used anymore, especially in some of the job classifications for applications of office help. Words like "executive assistant," "administrative assistant," or "legal assistant" are more commonly used today. . . but not the word secretary. This seems to be why over half of your organization has made the change already. They fully realize it is very timely and will make their association better and more acceptable to many "other members" of the legal profession. This change will definitely mean an increase in your membership while covering a wider field of legal professionals. In short, this will help to rebuild your entire organization.

The time has come for all of your associations to take a real "positive step" that is so badly needed, to *change your name* to California Legal Professionals, Incorporated. Let's "join hands" to go in the same direction, for the same cause, with the *same name!!* The very word "Professional" is real meaningful and it elevates anyone or organization to a much higher plateau throughout the entire legal field. With over 65% of your state associations now "changed" to using Professional for their own local associations, it seems to me that now is the time for the remainder of local associations to take that big step, in the right direction and vote to **CHANGE NOW !**

With a new President and officers for 2010, this move and the unity it will provide, will prove to benefit everyone and assure a very successful year for your great organization!! This can be the best move ever made to bring all of you together again. *(Remember, together we stand, divided we fall.)* **LS**



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JOYCE PURVIS

Joyce Purvis has worked full time in law offices involving family and civil law, and estate planning. She became very active on the Board of Directors for the Ventura County Legal Professionals Association and Ventura County Paralegal Association. Joyce has continued her education at UCSB extension and has completed 16 months of volunteer work in Negotiation/Mediation in Small Claims Court. Joyce began her Mediations in 2009 and is looking forward to getting paid for listening. Joyce can be reached at peaceful.endings@gmail.com.

Emergency Documents We All Sign

BY JOYCE PURVIS—SUBMITTED BY VENTURA COUNTY LPA

You can't begin having fun or even do volunteer work these days until the paper work is done. I was stationed at the volunteer table for a church event last December. My job was to have everyone sign the required release form before they could help with our community Christmas Shoppe. And yes—I had to sign a form myself before sitting down.

I read the form as anyone in the legal field would do prior to signing. I was a little uncomfortable with the wording and another couple had been advised by their son, an attorney, not to sign the release. I tried to smooth over the liability wording. Our church did not compose the form and therefore had no chance to change the wording prior to the event. The form basically stated that the organizers of the event took no responsibility for anything, even negligence on their part. Yeah, I had problems with that too. As it happens, the organizers can't take themselves off the hook for negligence, so this sentence would not protect them as the authors thought it would.

"The Release of Liability" document is signed by a hopeful participant and given to the operator of some sort of activity, such as an outdoor event, an organized trip or an athletic event. The participant releases the operator from liability for any injuries or damages which arise out of such participation. In addition, a parent or guardian can provide consent for his or her child to participate in the activity. Finally, the document gives the operator temporary authority to seek medical treatment for minors should the need arise. This is especially important if the parent or guardian will not be accompanying his or her children in the activity (for example, sending a child on a chaperoned church youth trip).

Although the Release of Liability document is designed to limit the liability of the opera-

tor for an injury to the participant, it does not protect the operator for damages or injuries caused by the operator's negligence or willful acts. Further, an injured party may try to ignore the Release. Therefore, it is highly recommended that the operator, in addition to requiring the Release, also maintain adequate liability insurance to further limit the operator's exposure to liability.

When my children were in school, we signed the occasional release form for field trips. I deleted directions involving medical care that said I did not need to be notified first. If I was going to be responsible for the medical costs, I wanted to know what damage had occurred. I was readily available by telephone during this period so there was no reason not to call me first. I did not sign blanket release forms. I crossed out wording that relieved parties of negligence. As a parent, I would sue parties if they were later found to have contributed to the problem.

Another point we often ignore is that the released party keeps the original copy of the Release of Liability document and we never keep a copy ourselves. How many of us have a copy of any permission slip or release form in our possession?

In general, a liability release form should include the following elements:

1. The name of the business or organization sponsoring the event or activity.
2. The name of the event or activity.
3. The name of the participant.
4. A statement that the participant understands that there are risks in participating in the activity.
5. A statement that releases the business or organization from the costs or liability should those risks result in damage or injury.

6. A statement from the parent or guardian that gives permission for their child to participate in the event or activity.
7. A statement from the parent or guardian that further gives consent for the organization or business to seek emergency treatment for the minor.
8. Signature of the participant, or the parent or guardian in the case of a minor.

An "Authorization of Emergency Medical Care" release form authorizes the event organizers to seek emergency medical assistance for oneself or one's dependent. If your child is in a school and youth sports event or activity, it is highly recommended that you sign a medical release form. In fact, virtually any organization that is responsible for the care of a child, such as a daycare center or summer camp, will usually require a signed medical release form from a parent or guardian. It should also be signed by a health care practitioner who has examined the child and verified that the child is fit to safely participate in the sport.

While there isn't a standard medical release form, organizations that require these types of documents typically include the same information. When completing a medical release form for minors, you can expect to be asked to provide the following information:

1. Child's full name.
2. Date of birth.
3. Full names of parents or guardians.
4. Additional emergency contact person (or people).
5. Contact information for parents, guardians, and/or emergency contacts: Home phone, Work phone, Cell phone, Address.
6. Who is responsible for supervising the minor child.
7. Dates of the event for which the medical release is being granted.
8. Details of medications the child is currently taking and procedures for administering.
9. Permission to provide emergency treatment to the child.
10. Health insurance information.
11. Release of liability.
12. Signature of parent or guardian.

ACCIDENTS HAPPEN

You may want to prepare a medical release form for babysitters or grandparents to use if your child suddenly needs medical care while under their care and you cannot be reached. Include:

1. Your name.
2. The name of your child or children.
3. The name of the babysitter or caretaker.
4. A statement that grants permission to the babysitter to seek medical care for your child or children along with any qualifying details.

5. Contact information where you can be reached.
6. Insurance information: Name of insurer, Policy number, Copy of insurance card, if applicable.
7. A list of the child's or children's medications.
8. A list of the child's or children's allergies.
9. Any other pertinent medical information, such as diseases or recurring illnesses.
10. Name and contact information of the child's or children's primary physician.


Some parents take the forms a step further and have them notarized, but in most cases it is sufficient to simply have a witness sign the form. Essentially you want the release form to clearly state that you grant permission for any needed medical care. Keep it brief, but include any and all information that you think is needed.

You should place the form in a prominent place when you are away from home. If your babysitter routinely takes your child or children out of the home, then he or she should routinely take the form along.

Remember--this form gives blanket authority to your babysitter to seek necessary medical care for which you will be financially liable, so you need to make clear which situations merit a trip to the doctor and which situations should be dealt with upon your return. You should also include directions to the closest medical facility in case the caretaker is unfamiliar with the area.

Where to find a hospital may seem like common knowledge but in an emergency, people don't think clearly. You don't want unnecessary delays when it comes to your loved one's emergency. Even the 911 operators ask for your location. If you don't know the address where you are, you could be the cause of delay yourself.

Release forms should be drafted by a lawyer except perhaps in the most routine of situations. If the release is not correctly drafted, the participant may find that the release was too general and released some claim, right or entitlement that the participant should have retained. On the other hand, if the release does not recite any particular limitations, an event organizer may find out later that the release does not provide the protection it was meant to provide.

The next time you are asked to sign a release form, be sure to double check the items of information that are requested, give it your best judgment and try to relax. No one wants an accident to happen but if it does and one of your loved ones is involved, you can be sure everything has been taken care of and is in order in your absence. I am thankful that in all the years I signed release forms, none of them ever had to be used. An ounce of prevention is worth a pound of the cure. 



WELCOME ABOARD THE LS-ISLE
MERCED COUNTY LEGAL PROFESSIONALS ASSN. and
STANISLAUS COUNTY LEGAL PROFESSIONALS ASSN.

AUGUST 13-15, 2010
LSI 1st QUARTERLY CONFERENCE
DOUBLE TREE HOTEL
MODESTO, CALIFORNIA



HOTEL REGISTRATION FORM

DOUBLE TREE HOTEL
1150 NINTH STREET
MODESTO, CA 95354
PH: (209) 526-6000

NAME: _____
MAILING ADDRESS: _____
CITY/STATE/ZIP: _____
HOME PHONE: _____ WORK PHONE: _____
E-MAIL ADDRESS: _____
LOCAL ASSOCIATION: _____ LSA/LPA (FULL NAME) _____
ARRIVAL DATE: _____ DEPARTURE DATE: _____

ACCOMMODATIONS: (PLUS APPLICABLE TAXES AND FEES)

- ☐ SINGLE/DOUBLE - **\$91.00**
☐ TRIPLE - **\$111.00**

SELF PARKING IS \$4.00 PER DAY
VALET PARKING IS \$12.00 PER DAY

PLEASE CALL HOTEL DIRECTLY FOR RESERVATIONS, 209-526-6000. USE CODE **[LPA]** TO IDENTIFY YOURSELF AS BEING A PART OF LSI IN ORDER TO GET THE GROUP RATE.



FOR GENERAL INFORMATION CONTACT:
REGISTRATION CHAIR ☐ LORRAINE BETTENCOURT - (209) 356-0815 ☐
plsccls@aol.com
OR CONFERENCE CO-CHAIR ☐ STEPHANIE HARRISON - (209) 723-
4479 stephmjb@sbcglobal.net
DIANE MECCA (209) 238-0946 ☐ diane@friendandwalton.com

HOTEL REGISTRATION DUE BY JULY 26, 2010



WELCOME ABOARD THE LS-ISLE
MERCED COUNTY LEGAL PROFESSIONALS
ASSOCIATION and
STANISLAUS COUNTY LEGAL PROFESSIONALS
ASSOCIATION



AUGUST 13-15, 2010

LSI 1st QUARTERLY CONFERENCE

DOUBLE TREE HOTEL - MODESTO, CALIFORNIA

CONFERENCE REGISTRATION FORM

NAME (ON BADGE): _____
MAILING ADDRESS: _____
CITY/STATE/ZIP: _____
HOME PHONE: _____ WORK PHONE: _____
E-MAIL ADDRESS: _____
LOCAL ASSOCIATION: _____ LSA/LPA (FULL NAME) _____

PLEASE CHECK IF APPLICABLE AND INCLUDE TITLE: PLEASE CHECK IF YOU ARE:
☐ STATE OFFICER ☐ GOVERNOR ☐ CCLS ☐ PLS
☐ STATE CHAIRMAN _____

SCRIP (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET AND BRUNCH)

☐ POSTMARKED ON OR **BEFORE JULY 12, 2010** \$ **99.00** \$ _____
☐ POSTMARKED **JULY 13, 2010 OR LATER** \$**109.00** \$ _____

INDIVIDUAL TICKETS

REGISTRATION BY JULY 12, 2010	_____ @	\$15.00	\$ _____
REGISTRATION JULY 13, 2010 OR LATER	_____ @	\$25.00	\$ _____
WELCOME RECEPTION (FRIDAY)	_____ @	\$20.00	\$ _____
LUNCHEONS _____ VEGETARIAN			
GOVERNOR'S (SATURDAY)	_____ @	\$29.00	\$ _____
PRESIDENT'S (SATURDAY)	_____ @	\$29.00	\$ _____
MEMBERSHIP (SATURDAY)	_____ @	\$29.00	\$ _____
SATURDAY NIGHT BANQUET	_____ @	\$42.00	\$ _____
_____ CHICKEN _____ PORK TENDERLOIN _____ SALMON			
SUNDAY BRUNCH	_____ @	\$22.00	\$ _____
TOTAL AMOUNT ENCLOSED			\$ _____

SPECIAL DIETARY NEEDS: _____

PLEASE MAKE CHECKS PAYABLE TO: M & M 2010 CONFERENCE FUND

MAIL TO: LORRAINE BETTENCOURT, 3361 SHORE LINE DRIVE, ATWATER, CA 95301



FOR GENERAL INFORMATION CONTACT:
REGISTRATION CHAIR ☐ LORRAINE BETTENCOURT - (209) 356-0815 ☐
plsccls@aol.com
OR CONFERENCE CO-CHAIR ☐ STEPHANIE HARRISON - (209) 723-4479
stephmjb@sbcglobal.net
DIANE MECCA (209) 238-0946 ☐ diane@friendandwalton.com

NO REFUNDS AFTER JULY 23, 2010

Appreciation – It's a 2-Way Street!... Continued from page 26

have been to devastate and shatter what little self-esteem I have left after many years in his servitude.

Having him for an employer has given me a great amount of job security. I do not know of another secretary that is even remotely interested in stealing my job out from under me. Whenever I want to better myself by attending workshops or seminars, I write off a vacation day and

assume the expense so as not to traumatize him by asking for his encouragement or, more important, his financial support.

Working for him has made me a better person. I am very patient and tolerant of other people. I juggle many tasks at the same time and have learned to anticipate his needs without his asking. He has helped me become a much more tenacious person and I am able to put in ten

hour days whenever necessary. Because he has helped make me what I am today, I nominate him for Boss of the Year."

My point is, even in the most adverse of situations, you can always find something to be thankful for. So don't forget to say "thank you" to your boss once in a while. You might find that the appreciation is bounced back to you. **LS**

Small Claims Court... Continued from page 27

parties within a short period of time by mail. Occasionally, a judge will decide the matter immediately.

Regardless of how notification is made, the judge's decision is final for the plaintiff, as the plaintiff may not appeal. The defendant does have the option to appeal the decision if dissatisfied. Time is short for the decision to appeal to be made, as the appeal paperwork must be filed within 30 days of the judgment entry date. If an appeal is processed, the

matter will be heard in front of another judge, and attorneys are allowed to be present to represent you. If an appeal is not desired, payment of the judgment should be made within that 30-day time frame. Failure to make the timely payment results in interest being charged, Judgment Debtor's Statement of Assets forms to be completed and further hearings, etc. The plaintiff does have ways available to collect the money awarded.

If the defendant opts to pay the judg-

ment, the plaintiff is required to complete, sign and file an Acknowledgment of Satisfaction of Judgment, once full payment is received. An entry of the satisfaction clearly shows the judgment was paid.

In a nutshell, small claims court may be a viable solution for many disputes in value under \$7,500. It is important to remember that, to be successful at your hearing and to make a positive impression on the court, you must be prepared!

LS

Are Raffles Legal... Continued from page 29

3. The scheme does not require any of the participants to pay for a chance to win.

LSI's raffles wouldn't be considered illegal gambling if the organization follows the guidelines set forth in Penal

Code §350.5 or if the organization meets the three exemption requirements.

Links

Penal Code Sections 319-326

<http://www.leginfo.ca.gov/cgi-bin/waisgate?WAISdocID=00417215244+1>

+0+0&WAISection=retrieve

DOJ Office of the Attorney General
Registry of Charitable Trusts

<http://www.ag.ca.gov/charities/> **LS**

Are Raffles Legal or are They a Form of Gambling?

BY GINA KUNDERT—SUBMITTED BY SAN MATEO COUNTY LSA



GINA KUNDERT

Raffles provide a chance to win prizes by purchasing paper tickets. Each ticket is sold with a coupon that is used to identify the winning ticket. The winners of the prizes are determined by draw. Raffles at membership meetings are very common among the various legal secretary associations. Raffles are used to bring in revenue for the association as well as entice people to attend meetings. Raffles are usually conducted by board members donating prizes for the association to raffle at the meetings. Members buy tickets, usually the length of an arm for \$5.00 or \$10.00 or 2 tickets for a \$1.00. Once the members purchase the tickets they place them in the bin next to the item they hope to win. Is this gaming legal or is your organization guilty of illegal gambling?

California Penal Code § 350.5 allows raffle fundraisers for "charitable purposes" held by a non-profit organization. Paying money to a charity for a chance to win a prize is the only type of raffle that is legal and not considered gambling. The first step to distinguishing if your association is an eligible organization is to review Penal Code 320.5 (c).

What is considered an "eligible organization"?

"Eligible organization" is a private, non-profit organization that has been qualified to conduct business in California for at least one year prior to conducting a raffle and is exempt from certain Revenue and Taxation Codes.

My organization is an "eligible organization," what else is required to come into compliance when hosting a raffle?

An eligible organization is required to register with the Attorney General's Registry of Charitable Trusts. This involves submitting a form and paying a nominal fee. Prior to holding the raffle, you must receive written confirma-

tion from the Attorney General's Office, which may take up to 60 days. You are also required to file a disclosure report for each raffle, anytime after the raffle was held but before September 1 of that period.

What sort of penalties can be accrued if I do not follow the guidelines of a legal raffle?

Penal Code Sections 320 to 326 and §532(c) are all relevant to illegal raffles. Some examples of the penalties are as follows:

Penal Code §320- Every person that prepares, sets up, or draws any lottery is guilty of a misdemeanor.

Penal Code §321- Every person that sells, gives, or in any manner whatever, furnishes or transfers to or for any other person any ticket, chance, share, or interest, or any paper, certificate, or instrument purporting or understood to be or to represent any ticket, chance, share therein, is guilty of a misdemeanor.

Penal Code §322- every person who aids or assists, either by printing, writing, advertising, publishing, or otherwise in setting up, managing, drawing any lottery, or in selling or disposing of any ticket, chance, or share therein, is guilty of a misdemeanor.

Does Penal Code §350.5 provide for any exemptions?

A raffle can be exempt from Penal Code §350.5 if it satisfies all of the following requirements:

1. The raffle involves a general and indiscriminate distributing of the tickets.
2. The tickets are offered on the same terms and conditions as the tickets for which a donation is given.

Gina Kundert has been in the legal field for about six years, starting out as a paralegal in a small law firm to the City Attorney's Office in Redwood City as a legal administrative assistant. She obtained her Bachelors Degree and Paralegal Certificate from Chico State University and recently completed her Masters in Criminal Justice from the University of Phoenix. Gina is serving her first year as the legal education chair for San Mateo County Legal Secretary's Association

Continued on page 28

Toss Your Typewriter... Continued from page 31

Now you're ready to type on the form which appears on your screen. Just pretend you are sitting at a typewriter and use the Enter key to move down the page and the tab key and space bar to move across the page. Amazing! Print and save your completed form when you're done as you would any word processing document.

If you need to edit your answers, you don't need to use White-Out and your typewriter. Just retrieve the file and edit as you would any document. Oh, and if you think you might need this form again, store the blank form in your Forms directory. **LS**

Demystifying the Complex... Continued from page 35

will benefit from a discussion of any specific coverage issues or funding issues that will impact settlement negotiations. Whatever the approach, the practice point here is to ensure that all submissions arrive at least a week in advance of any settlement conference to ensure that they will be read and considered.

Overall, taking a proactive approach to organization and preparation during a construction defect case saves time and money by ensuring efficiency and avoiding mistakes. CD matters often leave you feeling overwhelmed and out of control. Developing your own understanding and approach to CD litigation will help you

stay organized and confident in your ability to manage this process. Who knows, once you've implemented your own case handling system, you might find you actually enjoy complex CD matters. **LS**

Presentation is Key... Continued from page 36

premium solution for document rich cases, where not every item is a crucially important exhibit. Pretreatment and on the fly customization can be made to exhibits. For example, you can easily highlight and call out one important sentence within a text document so that the jury doesn't lose focus on extraneous information. Digital presentations are good for maintaining attention (especially that of younger jurors), because they are more similar to watching television or surfing the World Wide Web. The two most widely used trial software programs, Sanction and TrialDirector, have wonderful tools for the organization of documents. Folders can be created for the various stages of trial, and there are various methods of searching to find specific exhibits quickly and easily. One of the most impressive benefits of using these programs is the capability to import video testimony or depositions and have the synchronized transcript scrolling right beside it.

Digital presentations are absolutely sensational if done properly, but if not, the consequences can be punishing. Creating a precise presentation magnifies the authors' responsibili-

ties. First and foremost, they must be completely comfortable with the software and hardware being used, or be willing to hire someone who is. A lot of practice is required in making sure the presentation is seamless and error free. Planning and preparation for any foreseeable problem, such as bringing extra projector bulbs, is a must. The propane always runs out during your game day barbeque, not when you're just cooking for yourself. Even with all of the rehearsal in the world, the potential for computer issues beyond your control still exists.

Regardless of the presentation style that works for the attorney, or if it is a combination of the two, there are some key factors to keep in mind for success. A complicated, confusing or poorly executed presentation can do more harm than good, as it reflects those attributes on the attorney and their client. Train with the chosen media and play to its strengths while working around its weaknesses. All presentations should be clear, simple and brief (a good rule for most things in life). "Our life is frittered away by detail . . . Simplify, simplify."

— Henry David Thoreau **LS**

Toss Your Typewriter

BY LOUI TUCKER—SUBMITTED BY SANTA CLARA COUNTY LPA



LOUI TUCKER

It seems every law office has a typewriter somewhere – in the receptionist's area, on an out-of-the-way shelf in the workroom, or in a spare office. The only time anyone uses the typewriter is to fill in a form required by some government agency, a financial institution, or perhaps a title company. Sometimes forms are available on-line, but you cannot save them, retrieve them, and revise them. And then there are the delivery services and court runner forms that you're stuck filling in by hand!

Why aren't you filling them in on the computer? You just need to learn a trick using a scanner and Word or Word Perfect's header feature and it's possible to put those forms on your computer. You'll retrieve them, fill them in, print them, save them – just like any other word processing document.

First, scan the form to a file on your computer. You do not have to run it through OCR (optical character reader) software to turn it into text. Just scan it to a picture file with a ".jpg" extension.

Start from a blank screen.

Set the margins as small as your printer will allow.

Word 2003 - Click File, Page Setup, make all margins as small as possible

Word 2007 - Click Page Layout, Margins, Custom Margins, make all margins as small as possible

Word Perfect - Click Format, Margins, make all margins as small as possible

Set a small, fixed line spacing

Word 2003 - Click Format, Paragraph, Line Spacing, Exactly, 5 pt

Word 2007 - Click Home, Paragraph, Line Spacing, Exactly, 5 pt

Word Perfect - Click Format, Line, Spacing, .3

Move into the document header and reduce margins again

Word 2003 - Click View, Header, use mouse to reduce left and right margins

Word 2007 - Click Insert, Header, Blank header

Word Perfect - Click Insert, Header/Footer, Header A, Create, use mouse to reduce left and right margins.

Insert the scanned image of the form

Word 2003 - Click Insert, Picture, From File, locate scanned form, Insert button

Word 2007 - Click Insert, Picture, locate scanned form, Insert button

Word Perfect - Click Insert, Graphic, From File, locate scanned form, Insert button

Re-size and format the image

Word 2003 - Use the mouse to resize the image if needed to fill the page. Right-click on the image, select Format Image, click the Layout tab. Select "Behind Text" and click OK.

Word 2007 - Use the mouse to resize the image if needed to fill the page. On the Ribbon, select "Text Wrapping" and then "Behind Text."

Word Perfect - Use the mouse to resize the image if needed to fill the page. Then right-click, select "Wrap" from the menu and select "Behind text."

Exit to the main screen

Word 2003 - Click "Close" on the Header/Footer toolbar. The form image will fade to gray.

Word 2007 - Press the Escape key to return to the main document. The form image will fade to gray.

Word Perfect - File, Close (which closes the header window) and return to the main document.

Loui Tucker In the mid-1980s, Loui Tucker combined her early years as a public school teacher with three years as a legal secretary when she joined a company that sold, serviced and trained people how to use the then hot new technology – word processors. When that company closed its doors, she opened her own business The Software Dominatrix.

Over the years she assisted her clients with the transition from word processors to computers. Loui frequently gives workshops and seminars on the many tips and tricks she knows that increase efficiency and reduce strain. She can be reached at www.louitucker.com for more tips and tricks and macro solutions.

Continued on page 30



KIMBERLY STEVENS

Kimberly Stevens is a Senior Case Manager at JAMS, administering primarily complex mediations with a case load heavily focused on large multi-party Construction Defect matters. She works with Mediator/Special Master Bruce A. Edwards, Esq., who has over 20 years of experience specializing in complex construction disputes. She graduated with a B.A. from University of Pittsburgh, PA.

Demystifying the Complex Construction Defect Case: How Paralegals, Legal Assistants and Secretaries Can Help

BY KIMBERLY STEVENS—SUBMITTED BY ALAMEDA COUNTY LSA

If you've ever worked on Construction Defect (CD) lawsuits, then you know they can be complicated, if not, overwhelming. The good news is there are some steps you can take to make construction defect matters easier to handle for yourself and your firm. From understanding basic definitions to learning the procedural ins and outs of the CD litigation, you can learn what is needed to seamlessly manage one of these cases.

Typically, the Construction Defect case begins with a single homeowner or a group of homeowners (a Homeowner's Association) who bring suit against the General Contractor for alleged defects with the property. The General Contractor may or may not also be the Developer of the project. The Developer/General Contractor will usually bring a third party claim against all design professionals and subcontractors who worked on the project. This often results in the addition of twenty or more parties to the action, thus complicating case handling.

Plaintiffs' first step after filing the complaint will be to have their experts prepare a preliminary statement of claims (sometimes referred to as Defect list) and a Cost of Repair estimate. The statement of claims will identify all alleged defects including design deficiencies, geotechnical issues, and any number of construction deficiencies such as plumbing, roofs, windows, etc. Once the defects have been identified, California law (Senate Bill 800) requires a period known as the "right to repair" where the plaintiffs, having specified certain defects, must provide defendants the opportunity to perform repairs. If the defendant fails to ade-

quately make repairs or does not do so within a specified timeframe, then the case moves forward into litigation.

Under the California Standards of Judicial Administration, complex CD matters typically appoint a Special Master to try to reduce costs, help resolve the dispute, and manage discovery prior to trial. One of the Special Master's first actions will be to assist the parties in formalizing an initial Case Management Order (CMO). That first CMO sets forth procedural guidelines and targets specific dates for managing the discovery and settlement process. Legal professionals can be vital in this stage of the case by paying particular attention to all CMOs as they contain critical requirements and deadlines that your attorney will need to address. By understanding the initial CMO's deadlines and content, you can help your attorney and clients by ensuring nothing is overlooked from the very beginning.

SPECIFIC DETAILS TO NOTE IN THE CMO

Discovery Referee: Sometimes the term "Discovery Referee" and "Special Master" are used interchangeably in the Construction Defect context. It is important to note the Discovery Referee or Special Master's role and how much power has been assigned to him or her. Read this section of the CMO carefully to understand the types of hearings a Special Master can undertake. Often "Special Master" refers to someone who is typically also serving as a Settlement Referee and can schedule settlement conferences as well as discovery hearings.

Settlement Referee: The Settlement Referee may or may not be the same person serv-

ing as the Discovery Referee or Special Master. The Settlement Referee typically presides over settlement conferences but often also has the power to order Mandatory Settlement Conferences requiring the attendance of attorneys, clients, and insurance professionals. It is a good idea to note who is ordered to attend settlement conferences, so you can ensure your attorney and client are in compliance with the CMO.

Stay On Discovery: There is typically a Stay on Discovery except for a limited amount of document exchange, which is permitted and explained in the initial CMO. It is important to take note of the central document depository, usually a local court reporting service, where the limited discovery is permitted. Typically, a party will be required to deposit its original job file and answer basic interrogatories regarding Scope of Work and available insurance. The location, address, and procedure for depositing documents should be listed in the initial CMO and should provide for your client's Bates stamp designation for all deposited documents. Subsequent Case Management Orders will establish time frames for witness depositions beginning with the client's most knowledgeable witness (identified as "Person Most Knowledgeable") and concluding with expert witnesses.

Deadlines: Again, the initial CMO contains essential dates for planning that govern the orderly progression of the case and is typically summarized in a timeline at Exhibit F. In addition to calendaring these dates, a helpful step to take is to immediately notify your experts, insurance adjusters, and/or clients to ensure that they will be present for all upcoming site inspections, expert meetings, and settlement conferences. Bring any conflicting calendar issues that may delay the process to your attorney or directly to the Special Master to help save yourself time and calendar juggling later.

MANAGING THE PROCESS

Planning and preparation are critical to managing the CD litigation process. What may not be obvious are the small steps that you can take to stay organized. You can help your attorney be better prepared simply by efficiently managing all incoming correspondence and pleadings. The first step is to ensure you have an up to date service list, no small task in an ever evolving case. It is easy to overlook parties on your service list or be overlooked by others. Keep track of the incoming answers, notices of association, and letters from new counsel. If the case is E-filed, routinely compare your service list with others to keep all of your contacts up to date. It is a good practice pointer to confirm that you are listed with the Special Master's office as well as the Plaintiff and Developer.

In addition, paying careful attention to upcoming court events is an essential part in overseeing the litigation process. Court deadlines are often changed by the court or the Special Master through Case Management Orders and therefore result

in parties needlessly preparing for events no longer calendared or missing continued hearing dates entirely. Keeping track of important dates can be further complicated when the parties are often involved in significant settlement discussions and not paying particular attention to court deadlines. You can help by closely monitoring all dates and if appropriate, request a continuance of court required deadlines such as a Case Management Conference (CMC) in a timely fashion. A request to continue the CMC by the Special Master often saves everyone in the case time and expense. Even trial deadlines including Trial Setting Conferences (TSC) and Trial Management Conferences (TMC) can be postponed if the Special Master intervenes and has been given enough notice to timely pass along a Report and Recommendation to the court. It is sometimes the most obvious of deadlines that are overlooked when complex matters are involved, so your vigilance will be essential in avoiding missteps.

POISED TO SETTLE

Legal professionals can also help attorneys prepare for upcoming settlement conferences/mediations. Depending on your client's role in the negotiation, you may be asked to organize documents and/or prepare an agenda/schedule for settlement conferences with specific timeslots for parties to appear at the settlement conference/mediation. These agendas can be extremely valuable by ensuring that the mediation will be conducted efficiently. There are different ways to organize the settlement conference/mediation agenda, which should be discussed with your attorney in advance. Sometimes preparing the agenda by grouping similar trades is a more efficient means of information exchange and negotiation in contrast to individual timeslots. If you are not preparing the agenda, pay attention to which office will be serving it so that you can contact that office to find out the timeslot for your client. Most importantly, make sure that your attorney, client, expert, and insurance representatives have all arranged to be physically present at the settlement conference/mediation. If there is a calendar conflict or the insurance carrier does not want to make the trip to the mediation, you may be able to arrange for telephonic appearance as long as the carrier has full settlement authority and you get advance approval from the settlement referee/mediator.

As with any complex matter, a mediation brief may prove helpful to the mediator. Sometimes parties will opt to provide the mediator with a confidential letter outlining the basic facts of the case and specific reasons why the case will be hard to settle. Either way, you can be instrumental in this process by ensuring the brief has been submitted sufficiently in advance of the mediation to permit the mediator the opportunity to review all pre-mediation submissions. In addition to providing basic facts, identifying the parties and key allegations, the mediator

Continued on page 30



LORI ANN MCELROY

Lori Ann McElroy is the Art Director of the Design department at Esquire Solutions. She has a Bachelor's Degree in Art with an Emphasis in Graphic Design, and has been in the legal niche of exhibit consultation and design since 1999. She and her team meet and consult regularly with attorneys and paralegals throughout San Diego County to develop custom winning exhibits and successful presentations. Lori can be reached at lmcelroy@esquiresolutions.com.

Presentation is Key

BY LORI ANN MCELROY—SUBMITTED BY MERCED COUNTY LPA

After all of the painstaking discovery work that goes into a case, what a win or loss really comes down to is presentation during trial. A successful presentation will prove its point through a combination of words and visuals in a manner that builds confidence and trust with the audience. Attorneys are often very well versed in the art of language, but are not always so comfortable with the creation and use of visual aids. Visual communication can play a major role in persuading how a jury interprets information.

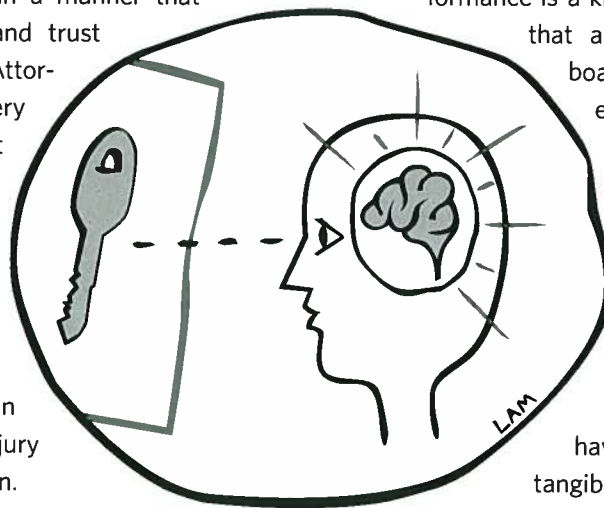
Studies show that over a 72 hour period, visual aids can increase viewer retention by 45%! Statistics like this make it obvious that a tool as powerful as visual aids should not be overlooked or underutilized, as it could be the key to ensuring a win. The two most common forms of presenting visually in the courtroom are traditional hard boards and digital projection. Both of which have benefits and shortcomings that need to be taken into consideration.

Traditional hard boards are not given the credit they deserve in the technical society in which we live. Many seem to think that high tech is the way to go, but boards definitely still have their place, and probably always will. However, they do have some faults, such as the fact that can be cumbersome transporting to, and maneuvering in the courtroom. They also need to be completely finalized ahead of time, because last minute edits and reproduction can be problematic.

The benefits of boards when applicably used are vast though. There are no surprises or technical mishaps to worry about. Even if boards have an interactive aspect such as flipping pages or dry erase capabilities, their performance is a known entity. In cases that are document heavy, boards are ideal for key exhibits in conjunction with a digital presentation. They remain in front of the jury box, emphasizing their point, and are often taken into deliberation. Boards have an unspoken tangible value due to the increased use of the internet.

Technology allows anyone to post anything they want or be anyone they like, from the far reaches of the universe with anonymity. Thus, boards are subconsciously given more validity, "It's here, it's real, I can touch and see it, so it's true." Boards also offer an interactive aspect which many disregard. They allow the attorney a reason to get up close and personal with the jury. Pivotal information can be left off and hand scribbled in for impact and shock value, drama that typing just doesn't achieve. It also allows for theatrical embellishments such as waving arms, pointing and thumping to emphasize an argument. This sort of passionate execution has an immeasurable impact on jury attentiveness and the attorney juror relationship.

On the other hand, digital presentations are gaining increased popularity. They are the



Continued on page 30

Dates to Remember in 2010

May 20-23, 2010

LSI 75th Annual Conference

Hosted by Butte County LPA and Sacramento LSA
Hilton Sacramento Arden West

June 1, 2010

Deadline for Submission

of articles for August issue of *The Legal Secretary*

July 12, 2010

Last day to register

for August conference to avoid a late fee

July 26, 2010

Last day to reserve a room

for August conference and receive group rate

August 13-15, 2010

LSI 1st Quarterly Conference

Hosted by Merced County LPA and Stanislaus County LPA
Doubletree Hotel, Modesto CA

August 18, 2010

Last day to register

For October CCLS exam

Helpful Websites

Supreme Court of the United States

<http://www.supremecourt.us>

Office of the Attorney General

www.ag.ca.gov

California Courts

<http://www.courtinfo.ca.gov>

California Assn. of Photocopiers and Process Servers

www.capps.org

California Codes

<http://www.leginfo.ca.gov/calaw.html>

California State Bar

http://www.calbar.ca.gov/state/calbar/calbar_home.jsp

California Legislative Information

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<http://www.uscis.gov>

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<http://pacer.psc.uscourts.gov>

American Medical Association

<http://www.ama-assn.org>

American Association of Law Libraries

<http://www.aallnet.org>

National Notary Association

<http://www.nationalnotary.org/index.cfm>

California Secretary of State

www.sos.ca.gov

National Court Reporters Association

<http://www.ncraonline.org>



DEBORAH RICKERT

Deborah Rickert is editor of *The Legal Secretary* magazine. She has served LSI as LSS Civil Litigation Leader, PRC Assistant Editor, Registrar, and Editor of *The Legal Secretary* 2004-2006. She is currently serving as Parliamentarian of Orange County Legal Secretaries Association. Deborah has been a legal secretary for over 25 years, and works at Latham and Watkins LLP in Orange County, California.

A Message From the Editor

BY DEBORAH RICKERT, CCLS

It has been an honor to serve as Editor of *The Legal Secretary* for the past two years, and I am proud of the changes made to bring the magazine up with the times. It was challenging moving on to a new designer and lithographer, and we will continue working together to produce the best magazine we can.

Special thanks to everyone who has been supportive of me these years, in particular, Patti Mires, CCLS for always being available as my #1 proofreader, Denise Lopes and Don Lee for sending photographs from each conference, each association that contributed great educational articles, and all members and guest writers who were authors of articles. The magazines produced have been full of interesting and educational topics.

If your association has a special event, please share it with all LSI members by submitting an article and photographs of the event, to be published in a future issue. Follow the Guidelines for Contributors to *The Legal Secretary* which have been created to ensure the magazine maintains its integrity and professionalism. The Guidelines are available on the LSI website in the Members Only section. The most important Guideline updates are (1) articles must be submitted by email as an attached document using word processing programs such as Microsoft Word or WordPerfect; (2) All articles submitted must be at least 500 words and no more than 2500 words; (3) When sending email, include in subject line: "[Last Name of Author] and [contents], " i.e., Smith - Article, Bio and Photo; and (4) All articles submitted must

be accompanied by the name, email address, contact information of person submitting the article, and name of submitting Association.

Immediately after the Annual Conference, LSI officers and chairmen must provide the magazine editor with a digital photograph to be used in the center photo page display for the August issue. When sending email with photo attached, include in subject line: "[Name of Officer/Chairman] Photo," i.e., Jane Smith - Photo. Photographs must be received by the deadline of June 1st.

The associations assigned to submit articles for the August 2010 issue of *The Legal Secretary* are: Alameda County, Antelope Valley, Bakersfield, Beverly Hills/Century City, Butte County, Capitol City, Conejo Valley, Desert Palm, El Dorado County, Fresno County, Humboldt County, and Imperial County. Submissions are to be received no later than June 1 and are always accepted prior to the deadline.

I encourage each of you to write an article for an upcoming issue. It's very rewarding to see your work published including your photograph and bio in the magazine. We need your help to continue making this magazine a success.

As always, we welcome your comments (or complaints), and recognize that this magazine is all about you, our members. Please let your views be known and give us some feedback on what you would like to see included in future editions of *The Legal Secretary*. Feel free to contact the Editor at any time by phone or email, either at home or office. **LS**

LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	UNIT PRICE	QUANTITY	TOTAL
BRASS TACKS* A guide instructing local officers and chairmen on how to perform their respective duties. Contains check lists, calendars and forms. (Rev. 5/06)	\$ 5.00		\$
CAREER PROMOTION/SCHOLARSHIP <i>NOT JUST A SECRETARY</i> BOOKLET Currently under revision and not available at this time			
CCLS BROCHURE Tri-fold brochure promoting the benefits of taking the CCLS Exam. Includes tear-off to request application form and information kit. (Rev. 2/08)	N/C		
CCLS MOCK EXAM (Revised 2009) Sample questions and answers to assist in preparing for all sections of the CCLS Exam.	20.00		
CCLS PIN A ½" high, 10-karat gold pin with CCLS logo. For the CCLS.	35.00		
CCLS STUDY KIT Contains Mock Exam (see above), Gregg Reference Manual with Basic and Comprehensive Worksheets and Instructor's Resource Manual.	120.00		
GUIDELINES FOR HOSTING LSI CONFERENCES* An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI Conference. (Rev. 2/08)	N/C		
GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM A 34-page guide, with sample forms, to assist with the planning and execution of a successful legal educational program. (Rev. 8/03)	5.00		
HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND GUIDELINES* A booklet with step-by-step directions, including rules and examples, for preparing a History Book for entry in the LSI History Book Competition. Created for local association historians and/or presidents. (Rev. 11/05)	5.00		
HISTORY OF LEGAL SECRETARIES, INCORPORATED A 50-page memory of people, places and events since 1929. (Rev. 2/08)	5.00		
LAW OFFICE PROCEDURES MANUAL FLYER An 8 ½" x 11" advertisement of the LOPM. Includes listing of contents and Order Form. (Rev. 1/02)	N/C		
LAW OFFICE PROCEDURES MANUAL INSTRUCTOR'S GUIDES To assist instructors in conducting training classes. Teacher Training Chapter offers tips for teaching. Other Guides supplement Chapters of the LOPM and contain projects, instructions to student, completed and blank legal forms, exams and answer keys.			
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MISCELLANEOUS CHAPTER (Rev. 9/07)	7.00		
LEGAL SECRETARY'S REFERENCE GUIDE A legal procedure guide designed to assist local associations in conducting a training class. Also useful for training office personnel and as a general reference for experienced staff. (Rev. 4/07)	30.00		
LSI BYLAWS AND STANDING RULES* As currently adopted by the LSI Governors.	5.00		
TOTAL THIS PAGE			\$

*Item available to LSI members only.

(Prices effective 5/1/09)

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ITEM	UNIT PRICE	QUANTITY	TOTAL
LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER An 8 1/2" x 11" advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/02)	\$ N/C		
LSI LEGAL SPECIALIZATION SECTIONS BROCHURE Lists Sections offered and reasons for joining. Includes Section Membership Application. (Rev. 2/08)	N/C		
LSI MEMBERSHIP BROCHURE Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application. (Rev. 2/08)	N/C		
LSI MEMBERSHIP PIN* (Magnetic) A 3/4" high oval gold-tone pin with blue and white enamel overlay. LSI logo in center and "Legal Secretaries, Incorporated" inscribed on circumference. For all LSI members.	5.00		
LSI ROSTER* Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.	N/C		
MEMBERSHIP APPLICATION FORM* An 8 1/2" x 11" form adopted 5/01 by LSI for use by all local associations. Includes request for Legal Specialization Sections information. Local associations may add second-page for supplemental information. (Rev. 5/08) Can be transmitted as an e-mail attachment (Word format), if so requested.	N/C	<input type="checkbox"/> E-mail -or- <input type="checkbox"/> Printed	
NEW MEMBER PACKET* A 2-pocket folder containing letter from LSI President, LSI membership information, Specialization Sections Membership Application, list of benefits and providers, CCLS information, Legal Professional's and Law Office Procedures Manual flyer and Code of Ethics. Local associations may insert additional material. For new local association members only.	N/C		
PRESIDENT'S PENDANT* A 1" high oval gold-tone pendant with blue and white enamel overlay. LSI logo in center and "Legal Secretaries Association" inscribed on circumference. Eye for necklace chain on back. For local association presidents.	7.00		
PRESIDENT'S PIN* Same as pendant (see above), but with pin on back.	7.00		
TOTAL THIS PAGE			\$
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*Item available to LSI members only.

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Please complete and mail this form to the following address with your check to reserve your place at one of the examination venues:

CCLS Certifying Board
5726 Lorelei Avenue
Lakewood, CA 90712

<input type="checkbox"/> Northern California	<input type="checkbox"/> Saturday, March 20, 2010
<input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, October 16, 2010

Deadline: Application must be received 60 days prior to examination date. A late application may be accepted up to 30 days prior to the examination if submitted with a \$25 late fee, in addition to the fees listed below, if space is available.

EXAMINATION FEES*			
LSI MEMBERS**		Non-LSI MEMBERS	
Registration fee:	\$ 15.00	Registration fee:	\$ 55.00
Examination fee:	\$ 95.00	Examination fee:	\$ 95.00
Total	\$110.00	Total	\$150.00

Enclosed is a check in the sum of \$ _____, payable to LSI.

* Fees subject to change without notice.

** LSI members: Name of local association: _____ LSA/LPA.
Please enclose a photocopy of your local membership card.
You must be a member upon application to be eligible for reduced fees.

*** Include \$25 late fee if applicable.

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Summary of Duties _____

Dates _____ Position _____

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I certify that I have completed this application truthfully. I understand that a false statement may result in the revocation of my certification. I understand and agree that the contents of the examination are confidential and are not to be discussed. I understand that my employment record will be verified by a member of the California Certified Legal Secretary Certifying Board.

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Applicant

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rev. 11/17/2008



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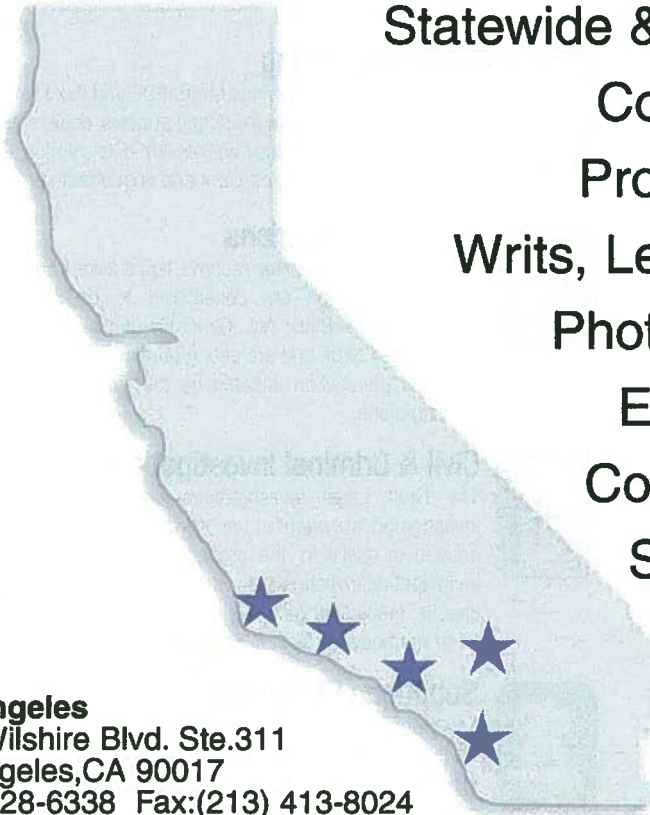
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