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**BY LYNNE PRESCOTT, CCLS**

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### THE LEGAL SECRETARY MAGAZINE

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# President's Message

BY JENNIFER L. PAGE, CCLS, LSI PRESIDENT



JENNIFER L. PAGE, CCLS has been in the legal field since 1989, starting out as a legal secretary to a bankruptcy attorney. She obtained her Paralegal Certification from St. Mary's College, Orinda, CA in 1991. In 2012 Jennifer joined the firm Ragghianti Freitas LLP embarking on the next adventure in her legal career working for seven partners of the firm and learning new areas of law.

Jennifer has been a member of Marin County LPA since 1990; has held virtually every officer and chairmanship position. Marin County LPA presented her with Honorary Life Member status in 2001. Jennifer began serving LSI in 1999 when she was appointed as the Legal Procedure Chair and continued to serve LSI until she was elected Treasurer in 2010. In May 2008, President Lorraine Bettencourt, PLS, CCLS, presented Jennifer with the President's Award. She is currently serving as LSI President.

Jennifer obtained her CCLS designation in October 2008.

Jennifer resides in Novato, California with her husband of 23 years Tony, and their 17 year old daughter Emma.

It's hard to believe that May 2018 will mark the end of my term as LSI President. These past two years have flown by. Several people have asked me if I'm ready to step down; and I can honestly say – no, I'm not ready to step down. I have thoroughly enjoyed every minute serving LSI. Yes, there were challenges and difficult moments but, I believe every experience has helped me grow both personally and professionally.

I could not have done this without the help of some amazing people. I have been honored to serve with a dedicated Executive Committee: Heather, Lynne, Rod, Mary and Kristi each bringing their own ideas and thoughts and most importantly wanting nothing but success for LSI. Along the way we've tackled a lot; we may not have always agreed with each other's position on something, but we treated each other with utmost respect; and in the process, I believe we have become friends. I thank each of them for their dedication and friendship.

I also must recognize and thank the Officers and Chairmen who served LSI these past two years. They too have been dedicated to their respective positions and have all helped move LSI forward. Thank you!

We have accomplished so much these past two years and there is even more to be done in the coming years.

- As of May 1, 2018, LSI has two new membership categories; student and associate. The Marketing Committee is putting together a marketing plan to encourage those who qualify to join as student or associate members.
- We've added a Webinar Section Leader and have plans to offer at least one Webinar a month.
- CAMS has settled into their position as LSI's Administrator – serving LSI efficiently and giving LSI a professional image.
- A contract has been signed with NextGen Legal who will be moderating our Beginning Legal Secretary and Discovery training classes along with offering up to 4 webinars a month on varying topics that will help both seasoned and new legal professionals.
- The treasurer's report is no longer read in its entirety and its gone green.
- The quarterly conference schedule has been modified to provide attendees a chance to meet with friends and mingle on Friday night but still provide them with the same excellent educational opportunities.
- Directives and Reports have gone green.
- As has *The Legal Secretary* magazine.

LSI is embracing technology and I believe will be the go-to organization for networking and education at a reasonable price.



## PRESIDENT'S MESSAGE

Looking to May Annual Conference, we will be back at the Garland Hotel in North Hollywood. I had the chance to tour the hotel in February and have to say the location is quite spectacular. Rooms feature complimentary high-speed wireless internet, private balconies, Pasadena-based and sustainable LATHER amenities, LCD flat screen TVs, a refrigerator/beverage center, an in-room safe, single cup brewer with complimentary coffees and teas, and all guestrooms are non-smoking. The hotel offers a trolley service to transport you to Universal Studios, City Walk, etc. Go to the Garland's website and click on Trolley for full details.

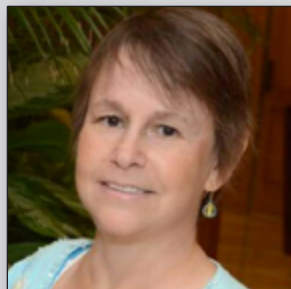
Conference starts bright and early Friday, May 18, 2018 with the Officer/Chairmen Workshops, which will include the President's Roundtable, Governors and Newcomers Workshops and others. Plan your travel accordingly so you are able to attend these very informative workshops. The 4 LSS Workshops will be held in the afternoon

followed by the Welcome/Campaign Reception. Saturday brings the Meeting of delegates which starts out with introduction of the Executive Committee, followed by the Keynote Speaker, elections and then reports of the Officers and Chairmen. Results of the Bulletin and History Book contests will be announced, and Scholarships awarded. We will also celebrate those who successfully sat for and passed the CCLS exam this past year at the Kalman Zempleny II CCLS Luncheon. The day is capped off with the Banquet where the new CCLS's will be celebrated once more, Chapter Achievement winners announced followed by the Rising Star and President's Award. Sunday Brunch celebrates the outgoing officers and chairmen and ends with the Installation of the newly elected officers.

Annual Conference is truly a remarkable event with lots of celebrating. Please plan on attending this year.

LS





MAE CHESTER, CCLS is the 2018 LSI Annual Conference Co-Chair. She has been a legal secretary for more than 30 years and has been with her current employer, Hogan Lovells US LLP, for 18 years. Mae has been a member of San Fernando Valley Legal Secretaries Association since 2008 and is currently serving as its Governor. She was recently appointed to the CCLS Certifying Board. Mae is a self-proclaimed yarn enabler and can usually be seen knitting.

# TEAMWORK – “Everything is Awesome When You're Part of a Team”

BY MAE CHESTER, CCLS, 2018 ANNUAL CONFERENCE CO-CHAIR

San Fernando Valley LSA (“SFVLSA”) is very excited to host LSI’s 84th Annual Conference May 17-20, 2018. Our committee has been working very hard to make sure you enjoy the memorable experiences as well as educational opportunities offered this weekend. Be prepared for three stimulating and memorable days filled with networking, educational seminars and workshops.

The conference is being held at The Garland hotel located in North Hollywood, California, the gateway to Hollywood. Our theme is “Teamwork – Everything is Awesome When You’re Part of a Team.” The hotel is 5 miles from the Hollywood Burbank Airport (formerly known as Bob Hope Airport) and 25 miles from Los Angeles International Airport (LAX). The hotel does not offer a shuttle to and from the airport, however, does offer complimentary trolley service to and from Universal Studios Hollywood/Universal CityWalk and LA Metro Red Line Universal City/Studio City Station. The Garland is easily accessible if you drive (between the 101 and 170 freeway exits for Vineland).

Defining “Teamwork” in its fullest sense, SFVLSA invites you to be involved with all types of teams: attend the Friday Night Reception (Television/Movie Teams); Saturday’s congratulatory lunch welcoming new CCLSs (Legal Teams); Saturday Night Banquet (Spy Teams) with an original Bond girl entertaining you with songs from the Bond movies; and Sunday Brunch (Sports Teams) will feature the installation of SFVLSA’s own Heather Edwards as incoming LSI President.



The Continuing Education Council and Legal Specialization Sections have scheduled great speakers for their seminars. See the registration forms in this issue for more information. Robert K. Tanenbaum, noted author of legal thrillers, will be our keynote speaker Saturday morning.

Be sure to visit the legal and non-legal vendors offering goodies and information to help you in your day-to-day jobs as legal professionals. Be sure to get your vendor card signed and dropped in the box for an opportunity for a prize. Get your tickets for the fabulous door prizes offered. Don’t forget to visit the History Book and Bulletin contest entries. Each association will have only one vote for the outstanding entry. Get inspiration for doing your own for next Annual.

The Hotel was recently renovated and remodeled. The Conference will take full advantage of new and exciting venues within the Hotel. The Hotel features a business center, fitness center/spa and personal trainer, and pool. The Hotel offers a dogs-only pet policy (check the website), a Reverse Happy Hour at the Front Yard. Discount tickets are available through the Hotel to various

Southern California attractions including Universal City Park and the Wizarding World of Harry Potter. Check out the Hotel website for unique items such as the Melting Pot tours. If you are so inclined, visit stars of the past at the Forest Lawn Cemetery and the Hollywood Forever Cemetery. The Hotel's Trolley offers service to both the LA Metro Redline Station and to the Universal City/City Walk Shuttle. A myriad of attractions are an easy subway, bus, or car ride away. Minutes from the Hotel are museums, Union Station, Olvera Street, and the San

Fernando Mission. You can check out the original themed art at each Metro Station. Metro offers free regularly scheduled group tours if you are interested. You can also check out tapings and tours at the various local studios, including Paramount, NBC, and Warner Bros.

SFVLSA is looking forward to seeing you in May! Join us for a fabulous weekend.

LS

# Congratulations to LSI's Newest California Certified Legal Secretaries!

**THE FOLLOWING INDIVIDUALS ARE TO BE RECOGNIZED AND COMMENDED FOR PASSING THE CCLS EXAM DURING THE 2017-2018 YEAR:**

---

Kathy A. Bailey, CCLS - Sacramento LSA	Becky Neidhardt, CCLS - San Diego LSA
Elise Bowie, CCLS - Non-LSI Member	John Pianka, CCLS - Non-LSI Member
Dana Chan, CCLS - San Gabriel Valley LSA	Erika R. Shannon, CCLS - San Francisco LPA
Cynthia Dahl, CCLS - Orange County LSA	Pamela Schuld, CCLS - Orange County LSA
Rachel Kayhan, CCLS - Alameda County LSA	Karen Zeitvogel, CCLS - Sacramento LSA

---

Passing the CCLS examination is a tremendous achievement and these new CCLSs deserve kudos for rising to the challenge and proving that hard work, dedication, and commitment can lead to fantastic results!





## LEGAL SECRETARIES, INCORPORATED Officers and Chairmen Workshops

May 18, 2018

Moderator: J. Cori Mandy, CCLS, Educational Program Coordinator

Schedule: 8:30 a.m.

Registration– J. Cori Mandy, CCLS

**10:15 -10:30 a.m. Coffee Break**

President's Roundtable (Incoming/Outgoing Presidents Only) Moderator: Jennifer L. Page, CCLS, LSI President Location: TBD		9:00 a.m. to 11:45 a.m.
First Session – 9:00 a.m. – 10:15 a.m.		Second Session – 10:30 a.m. – 11:45 a.m.
<u>Treasurer/Corporate Workshop</u>  Moderators: Rod Cardinale Jr., LSI Treasurer Kim Oreno, LSI Administrator Location: TBD		<u>Newcomer's Workshop</u>  Moderators: Linda Neuman Shannon Quigley Location: TBD
<u>Governor's Workshop</u>  Moderator: Lynne Prescott, CCLS LSI Executive Secretary Location: TBD		<u>Parliamentarian</u>  Moderator: Kristi L. Edwards, CCLS LSI Parliamentarian Location: TBD
<u>Advertising/Marketing/Social Media Workshop</u>  Moderators: Heather Edwards, LSI Vice President Larry McGrew, LSI Advertising Chair Erika Garduno, LSI Social Media Chair Location: TBD		9:00 a.m. to 11:45 a.m.

Please note: Locations are subject to change.

Please r.s.v.p. E-mail: [jcmandy5@gmail.com](mailto:jcmandy5@gmail.com) or 619-515-3256/619-954-3603

# LEGAL SPECIALIZATION SECTIONS SEMINARS

May 18 and 19, 2018  
Beverly Garland Hotel  
4422 Vineland Ave., North Hollywood, CA



**The last day to register without a late fee is May 11, 2018.**

<b>LSS MEMBER</b> Free with Advanced Reservations \$5 at the Door/After Deadline -- Handout Only: \$5	<b>NON-LSS MEMBER</b> \$15 with Advanced Reservation \$20 at the Door/After Deadline -- Handout Only: \$15
<b>Friday, May 18, 2018, 1:30 p.m. to 3:30 p.m.</b>	
<b>Probate and Estate Planning</b>  <b>Complex Trusts</b> Alex Bruno Bruno Group Inc.  <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER	<b>Federal Law</b>  <b>The Surprising Origin, Continued Relevance, and Uncertain Future of Privacy in Our Data Driven Age</b> Michael Maddigan Hogan Lovells US LLP  <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER
<b>Friday, May 18, 2018, 4:00 p.m. to 6:00 p.m.</b>	
<b>Criminal and Family Law</b>  <b>Asylum/Special Immigrant Juvenile Status</b> Amy Woo Lee and Jossiel Moreira Kids in Need of Defense – KIND  <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER	<b>Law Office Administration</b>  <b>Using Your Brain And Common Sense: A First Amendment Discussion</b> Jeremy Geltzer  <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER
<b>Saturday, May 19, 2018, 4:00 p.m. to 6:00 p.m.</b>	
<b>Specialty Law</b>  <b>TBD</b>  <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER	<b>Civil Litigation</b>  <b>Transportation Network Companies (Uber, Lyft)</b> Roxanna M. Robertson Clerkin, Sinclair & Mahfouz, LLP  <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER

Name: \_\_\_\_\_ ☐ CCLS ☐ Paralegal ☐ PLS  
 E-mail: \_\_\_\_\_ (please print clearly, confirmations sent via email)  
 Local LSI Association (if applicable): \_\_\_\_\_ ☐ LSA ☐ LPA

**REGISTRATION AND PAYMENT VIA CREDIT CARD AT [WWW.LSI.ORG](http://WWW.LSI.ORG) PREFERRED**

If paying by check, make payable to LSI and send to: Dawn R. Forgeur, CCLS, LSS Coordinator  
 500 Capitol Mall, Suite 1600  
 Sacramento, CA 95814

The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 2.0 hours each, by the State Bar of California unless otherwise specified.



FEBRUARY, 2018 | BUENA PARK, CA

# LSI's 3rd Quarterly Conference











MARY LOU FLOYD, CCLS has been a paralegal for over 20 years, has a BA in Criminal Justice, and an MS in Psychology. She has been a member of Mt. Diablo Legal Professionals Association since 1988, is a past president, and is currently the Parliamentarian. She is also LSI's Legal Specialization Sections Criminal/Family Law Section Leader. On a personal note, Mary Lou enjoys reading, bicycling, exercising and spending time with her husband, children, grandchildren and friends.

# Millennials: Who Are They?

BY MARY LOU FLOYD, CCLS – SUBMITTED BY MT. DIABLO LPA

How many times have you heard the term “Millennials” lately? If you are reading HR materials, business magazines, or listening to the news, the term is likely to be found there.

Who are these Millennials? According to the Washington Post, Millennials are young people between the ages of 18 and 33. The Huffington Post identifies Millennials as people born after 1980.

Here are terms used for other generations. Baby Boomers are people born between 1946 and 1964. Generation X are people born between 1965 and 1980. (Huffington Post)

What makes the generations so different and distinct? What am I? I can provide some answers from my own experience. First, I'm a Baby Boomer. The primary difference is that as a Baby Boomer, I didn't utilize or experience the technology that a Millennial has at his or her disposal. Computers had been invented but were extremely expensive and not everyone could afford one. The main server usually took up an entire room or a large portion of an office. Cell phones were a futuristic concept - the first analog phone was commercially introduced in the early 1980s. The Internet was touted as being from the devil (yes, you can laugh at this!).

My first experience with computers was at a refractory plant and laboratory (a brick plant) in Pittsburg, California. I was the certified Quality Control Technician for the laboratory. The computers were a Wang system and DOS based. The paper for the many printers (depending on the size of the paper) was hooked onto pegs, was perforated, and you had to tear off the edges after you printed your report. There were days that I couldn't believe how much I was learning, my brain felt like it would implode, I was scared I'd mess the entire system up, but I also saw how scared people were to enter my domain where all the computers were housed and where I ran all the laboratory reports. I felt I had a tremendous responsibility and an important role in how the laboratory functioned. I was also able to design and help implement computer programs and reports to improve the production of refractory products.



I had several people who motivated me to learn the new technology. I was a single mother at the time and the primary support for my daughter. As I learned all about the computers, how to run them, how to change the programming, how to fix the printers, etc., so did my job security and my pay. My mentor, Roger R. Riley (R3 as he was known at the refractory), had a lot of faith in my ability. He always encouraged me and told me I could do it. The other influential person was my father. He didn't finish grade school, English was his second language, and yet he operated and ran computerized equipment at what is now U.S. Posco (the steel mill in Pittsburg, California). If he could do it, certainly I could!

The refractory business was a dying industry. The lab in Pittsburg was going to close. I was offered an important position at the laboratory in Ione, California, but that just wasn't for me. My roots were here in the Bay Area.

R3 sent me to one of his friends who owned a staffing agency. He told me she would find something that would help me with my future and to provide for my daughter. The first assignment I was sent to was to a law office in Walnut

Creek. I walked in the door and there was chaos! The new computers had just arrived, and no one knew how to use them. I approached the counter, and someone asked me what I wanted. I said I was there for an interview for the legal secretary position. A woman turned around and told me that if I could show them how to use the new computers, I was hired. I went behind the counter, flipped the switch on the side, entered a few key strokes, and the computers were up and running. That woman turned out to be the partner of the firm. I worked for her for several years. I trained the staff and together we adapted quickly to the new technology.

Not all law firms were lucrative enough to afford computers. The next firm I worked at as a legal secretary (paralegals were not yet “invented”), typed legal documents on an IBM Selectric typewriter or something comparable. Copies were made by using carbon paper. If I had to make 3-4 copies of a legal document, I had at least 6 pages of paper and carbon paper in the typewriter, and I moved the lever to the hardest striking strength to get the clearest image I could on that last page. If I made a mistake, there were time-consuming remedies to make the corrections, none of which I want to dredge up at this moment.

Eventually, the firm bought Wang systems. Once again, I was in my element. At this firm, a couple of the attorneys had car phones. They were these large contraptions that the attorney kept in the glove box (if it fit), in the center console (if it fit), or on the front seat. We only called the attorney on this phone if it was urgent and the attorney only used this phone if it was urgent.

Here are some items Millennials didn't experience: 5 ¼" floppy disks, transcription machines (using cassette tapes), 8-track tapes, cassette tapes, fax machines that used special thermal paper, etc.

On the flip side, Millennials have a myriad of communication tools at their fingertips: cell phones, texting, instant messaging, video chats, web cams, and social media sites. Millennials are tech savvy, able to learn new software and adapt to new technology quickly.

Recently, I discovered how tech savvy I've become. I attended a legal educational conference through LSI ([www.lsi.org](http://www.lsi.org)) for legal professionals. This is a non-profit organization dedicated to educating California's legal professionals. I am currently the Criminal/Family Law section leader. I surprised myself, and others in my group, by presenting an innovative way to use webinar software and other technology to market the legal specialization sections, specifically to target Millennials and to provide a marketing tool for local associations. Earlier last year, I would not have

had the knowledge or experience to be of much assistance or value to the legal specialization sections. Galia Aharoni had faith in me to learn the new technology and now I have the knowledge and experience to be of value in reaching the Millennials to keep LSI growing and thriving into the future.

I am fortunate to be working in a law firm started by a Millennial. Looking back, the primary difference in working for a Millennial owned firm versus a Baby Boomer owned firm is that the Millennial is more open to utilizing new technology and keeps abreast of what is new and useful for the firm. It is different working for a Millennial because I feel I have limitations to use and learn new technology – or rather fears. Working for Baby Boomers they were looking to me to see where technology would take the firm, but resistant to change too much. Baby Boomer owned firms are usually resistant to using social media, and their websites may not exist or may be very limited as to the information on the site. A Millennial owned firm is already using new technology and social media to reach out to clients.

There is another aspect with regard to Millennials and the workplace. How can a Millennial be expected to enter the work force and become part of a team that is comprised of Baby Boomers and Generation Xers? Integrating Millennials into the work place is like learning new technology. Providing Millennials with training, a mentor, and a purpose are some tools that can help. But also listening to Millennials and the ideas for future technology or how to use social media or improve a website to attract other generations can bring positive change to the workplace.

Technology has enabled workers to log in from anywhere and work either from home, or other remote locations. Millennials have adapted to this concept quicker than Baby Boomers and some Generation Xers. Being able to work from home or remotely provides common goals for all generations striving to have a good work/life balance and flexible hours.

As everyone adapts, learns new technology, and embraces the Millennials, we will increase opportunities for professional development, improve quality of services, and balance the needs of multiple generations in the workplace. Cheers to the future!

LS





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KAREN J. JONES is the Editor-in-Chief of LSI's Publications Revision Committee. Karen has served on LSI's Legal Specialization Sections as the Transactional Law Section Leader. She is a member of Beverly Hills/Century City LSA currently serving as Treasurer. She has been working as a legal secretary for over 33 years.

# What is the PRC and What Do We Do?

BY KAREN J. JONES, LSI EDITOR-IN-CHIEF

When I joined the Beverly Hills/Century City chapter of Legal Secretaries, Inc. ("LSI"), I never imagined that I would hold such a responsible state position as being the Editor-in-Chief ("EIC") of the Publications and Revision Committee ("PRC"). I remember the very first time that I was asked to serve at the state level like it was yesterday. I received a call from Mary Rocca, CCLS, wanting to know if I would serve as the Transactional Specialization Section Leader during her term as President. Of course I said "yes" and that is how I began serving LSI at the state level.

I am often asked what it is that I do as EIC of the PRC. Well, the short answer is that I oversee a wonderful group of people who, together with me, make sure that the publications of LSI are properly and correctly updated three times a year. The Law Office Procedures Manual ("LOPM") is updated twice a year and the Legal Professional's Handbook ("LPH") is updated once a year.

The PRC consists of: EIC – Karen J. Jones, Editor of the LPH – Linda Lane, CCLS, Editor of the LOPM – Lisa De La O, and the following Assistant Editors: Betty J. Thomas, Pamela Schuld, CCLS, Judy Johns, CCLS, Norma Marquez, and Sue Sampley, CCLS.

The entire PRC are called to two quarterly conferences and annual conference. When we are all together, I make our meeting time educational. Everyone also brings their assigned chapters to work on. During this time questions are asked and answered and thoughts and ideas about how to make the LSI publications better are discussed. The editors and EIC are called to every LSI conference at which we work on our chapters as well.

The chapters of each publication are divided evenly among the PRC. Once the Assigned Editor has received her chapters, she goes through them to make sure that they have the most recent updates in them. A copy of her assigned chapter is made (single sided, not double-sided). The next step is to go through the chapter and highlight every code/rule of court/regulation/other reference/form number with a different highlighter color. After this is completed the assigned editor reads, reviews, and compares the references

that have been highlighted to the appropriate code book or she goes on-line to Westlaw to make sure that what is cited is still current. If the code has been updated then the assigned editor has to make sure that what the publication says is up to date as well. The forms at the end of each chapter of the LOPM and the LPH have to also be checked to make sure that the current form is reflected in the chapter.

When all of this is done and the changes are made and saved to the chapter's flash drive, then the entire chapter is sent to a different reviewing editor who has been assigned to review the chapter. After the reviewing editor has reviewed the chapter, doesn't make any changes, and finds everything just fine with the chapter that she reviews, then the chapter is sent on to the LOPM Editor or the LPH Editor. Once the chapters are received by the LOPM Editor or the LPH Editor then they review each chapter one last time before the chapters are sent to me. This takes a minimum of 10 to 20 hours a month for each person on the PRC to do.

After the EIC receives the LOPM and LPH chapters she reviews them, again, and then prepares the chapters for shipment to Rutter. The EIC does this by saving each chapter to a flash drive and then forwarding the flash drive to Rutter so that the contents of the flash drive can be published.

I hope that this answers everyone's questions about what the PRC is and what we do. See you all soon.

LS

## Publications & Revision Committee



LINDA NEUMAN has worked in the legal field, primarily in personal injury for 39 years. She joined Santa Clara County LPA in 1987, where over the years she has participated in a wide variety of activities, chairmanships and also served on its Executive Board. The last four years she has served on the Executive Board as Governor. Recently retired, Linda enjoys spending her time with her newly inherited 97 lb. Weimaraner, Hans.

# A Day in the Life of a Governor

BY LINDA NEUMAN – SUBMITTED BY SANTA CLARA COUNTY LPA

I have been the proud Governor for Santa Clara County LPA (SCCoLPA) for the past four years. Did you ever wonder what “A Day in the Life of a Governor” is like? Well, here’s what “A Month in the Life of a Governor” is like.

If you are interested in a Board position, traveling throughout the State of California, networking with people who are involved in many different aspects of law and want the feeling of making a difference, then being a Governor is for you.

During a month, and in particular a month which includes a Quarterly Conference, as Governor you have many important (and fun) duties to fulfill. Let’s go through the activities and duties you have starting at the beginning of the month.

Remember that the Governor is the liaison between your association and LSI. Whenever you receive any correspondence, conference documents or educational notifications from LSI, it is your responsibility to email this news to your membership. When sending these emails, I have in the past, tried to put my own “fun and to the point” type of spin on things as sometimes reading bylaw amendments can be confusing and time consuming. So the ability to summarize is definitely an asset in the Governor’s world.

Not only are you circulating reports, as Governor you will need to prepare a report for the monthly board meetings; you will need to present a report at the general meetings; and after attending conferences prepare another report that is posted to the website. Reporting on conference and telling the membership about the inner-workings of LSI is the heart of being a Governor. Don’t get me wrong, reporting IS important but so is having a little fun. Something I like to do at General Membership Meetings around conference time is to wear some sort of themed conference accessory or outfit while reporting on conference. This is where the fun comes in.

A Governor’s attendance at conference, which usually is paid for by your association, begins on a Friday night and continues through brunch on a Sunday morning. Prior to conference you will need to read all the LSI reports, which



I find REALLY interesting, as you get an idea of what is happening all over the State of California. Make sure you read any bylaw amendments and talk with your Board about opinions on voting on these at conference. Of course attendance at the Governor’s Lunch on Saturday is ALWAYS a treat, but it is truly a working lunch. No there isn’t a secret ceremony or secret handshake at the lunch but what we do is go over items on an agenda, prepared by the luncheon moderator (LSI’s Executive Secretary), and we also review the Executive Committee (EC) Resume. The EC Resume is comprised of items the EC discussed during their all-day meeting on Friday before the business portion of the meeting on Saturday. In order to attend this lunch, Governors and/or Governors Pro Tem must submit, prior to conference, a Notification of Attendance at Board of Governors Meeting, which is now accessible via the LSI website before any submission deadline and helps in preparing the agenda for the lunch.



The big reason for attending conference is the LSI business portion of the meeting. This is where you find out how LSI is run, and this is where Governors can express their opinions on subjects that come up. I find this type of activity uplifting, informative, and lets me feel like I am a part of the bigger picture.

Another activity that a Governor does on a monthly basis is collect Chapter Achievement points from the membership. This is a kick in the pants. Members either email or tell me what they have done during the month, I record it on a spreadsheet, and after the first of the year, around March or so, transfer that data onto the LSI Official Contest Form and submit it. I have to admit, I do get a little competitive with Chapter Achievement. But as you know, SCCoLPA is a hard working group and I want to let our sister Associations know we are a VERY active Association.

So, there you have "A Day in the Life of a Governor" in a nutshell. I hope this gives you a better view of what goes on during the month and also strikes up some interest in taking on the position of Governor of your association. If you are at all interested in the position of Governor, you can attend the Governor's lunch at the February conference as a "Governor in Training."

On a personal note, I would like to share with you something that has made my term as Governor one of the most fulfilling times of my life. At our 2016-2017 Installation Ceremony, our Installing Officer Patty Russell read off the usual duties of the office of Governor but added a little something which played into President Elise's theme for the year. Patty read, "Your 'Don't Be Too Shy To Try' assignment will be to meet three new people at every LSI Conference you attend." Well this was quite the assignment. Believe it or not I am a little shy when it comes to going up to someone and striking up a conversation. I am much better at joining in on a conversation already in progress. So I took my Governor assignment to heart, and went up to at least three people every conference this last year. I have met some absolutely wonderful people because of this, and I am much better at starting a conversation. So in summary, being a Governor is the best and I encourage everyone to give it a try.

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Creative Director



# Dates to Remember in 2018

- May 11, 2018** Registration deadline for Legal Specialization Sections Seminars at Annual Conference
- May 17-20, 2018** LSI Annual Conference  
The Garland Hotel, North Hollywood, CA  
Hosted by San Fernando Valley LSA
- June 1, 2018** Last day to submit articles for August 2018 issue of The Legal Secretary
- June 22, 2018** Deadline to register for CCLS On-Line Study Group (July 8 - Sept. 9, 2018)
- July 8, 2018** CCLS On-Line Study Group begins
- July 20, 2018** Registration deadline without late fee for LSI 1st Quarterly Conference
- August 10, 2018** Registration deadline for Legal Specialization Sections Seminars at LSI 1st Quarterly Conference
- August 17-19, 2018** LSI 1st Quarterly Conference  
Stockton Hilton, Stockton, CA  
Hosted by Stockton-San Joaquin County LPA

## Quarterly Assignments

**THE FOLLOWING ASSOCIATIONS ARE EXPECTED TO SECURE ARTICLES FROM GUEST WRITERS FOR PUBLICATION IN THE MAGAZINE ISSUES SPECIFIED BELOW.**

- **A. AUGUST ISSUE (TO BE SUBMITTED NO LATER THAN JUNE 1ST):**  
*Alameda County, Beverly Hills/Century City, Conejo Valley, Contra Costa County, Desert Palm, Fresno County, Humboldt County, Imperial County*
- **B. NOVEMBER ISSUE (TO BE SUBMITTED NO LATER THAN SEPTEMBER 1ST):**  
*Livermore-Amador Valley, Long Beach, Los Angeles, Marin County, Merced County, Mt. Diablo, Napa County, Orange County, Placer County*
- **C. FEBRUARY ISSUE (TO BE SUBMITTED NO LATER THAN DECEMBER 1ST):**  
*Rio Hondo District, Riverside, Sacramento, San Diego, San Fernando Valley, San Francisco, San Gabriel Valley, San Mateo County, Santa Barbara*
- **D. MAY ISSUE (TO BE SUBMITTED NO LATER THAN MARCH 1ST):**  
*Santa Clara County, Santa Cruz County, Santa Maria, Sonoma County, Southern Butte County, Stanislaus County, Stockton-San Joaquin County, Trinity County, Ventura County*

# LEGAL SPECIALIZATION SECTIONS

## 2017-2018 Membership Form

MAY 1, 2017 - APRIL 30, 2018

Membership includes access to free quarterly workshops at LSI conferences for those sections you are a member of; quarterly newsletters that include changes to the law and forms; LSS webinars; statewide roster of all LSS members in each section for easy access to local procedural information in other counties; and networking opportunities. The Legal Specialization Sections (through LSI) offer continuing legal education credit for California Certified Legal Secretaries and MCLE for paralegals and attorneys.

## JOIN OR RENEW AT [WWW.LSI.ORG](http://WWW.LSI.ORG)

PAY VIA CREDIT CARD OR PAYPAL

### SECTIONS

(circle which sections you are joining)

- Civil Litigation
- Criminal/Family Law
- Federal Law
- Law Office Administration
- Probate/Estate Planning
- Specialty Law

### LSI Member Rates:

Individual Section: \$20

All Six Sections: \$75

### Non-LSI Member Rates:

Individual Section: \$40

All Six Sections: \$150

**If paying by check, make payable to "LSI" and mail to the LSS Coordinator. This information is distributed to all members of the Legal Specialization Sections.**

Name: \_\_\_\_\_

Email Address: \_\_\_\_\_

LSI Member, Local Association/MAL: \_\_\_\_\_

Legal Specialty(ies): \_\_\_\_\_

Counties/Courts: \_\_\_\_\_

This information may be included in the LSS Roster and sent to all LSS members periodically. Newsletters are emailed to members, if you would like to opt out, please email the LSS Coordinator.

**Dawn R. Forgeur, CCLS**  
**LSS Coordinator**

c/o Stael Rives LLP  
500 Capitol Mall, Ste. 1600  
Sacramento, CA 95814

E-mail: [dawn.forgeur@stael.com](mailto:dawn.forgeur@stael.com)  
[www.lsi.org](http://www.lsi.org)



# CCLS QUIZ:

## ABILITY TO COMMUNICATE EFFECTIVELY – GRAMMAR

ANSWER "TRUE" OR "FALSE" FOR EACH STATEMENT BELOW.

1. NEITHER THE PLAINTIFF NOR THE DEFENDANT [A] HAVE [B] HAS THE TENTATIVE RULING.
2. THE BOARD [A] IS [B] ARE DRIVING THEIR OWN CARS TO THE MEETING.
3. HE IS THE KIND OF ATTORNEY [A] THAT [B] WHICH ALL PLAINTIFFS WOULD LIKE TO HIRE.
4. THE PLAINTIFF MUST ASSERT ALL OF [A] IT'S [B] ITS CLAIMS AT THE OUTSET OF THE CASE.
5. [A] WHO [B] WHOM IS THE PERSON IN CHARGE OF THIS PROJECT?
6. YOU AND [A] ME [B] I ARE THE DESIGNATED SIGNORS.
7. I WISH SHE [A] WERE [B] WAS PRESENT FOR THE HEARING.
8. A NUMBER OF ACCIDENTS ON THE FREEWAY [A] HAVE [B] HAS TIED UP TRAFFIC.
9. THE OPPOSITION TO THE MOTIONS [A] ARE [B] IS DUE TODAY.
10. WE [A] CAN NOT [B] CANNOT DO ANYTHING, OR WE CAN FIX THE PROBLEM.

CCLS QUIZ ANSWERS ON PAGE 27

## 2018 California Court Holidays

<i>Monday, May 28</i>	<i>Memorial Day</i>
<i>Wednesday, July 4</i>	<i>Independence Day</i>
<i>Monday, September 3</i>	<i>Labor Day</i>
<i>Monday, October 8</i>	<i>Columbus Day</i>
<i>Monday, November 12</i>	<i>Veterans Day</i>
<i>Thursday, November 22</i>	<i>Thanksgiving Day</i>
<i>Friday, November 23</i>	<i>Day after Thanksgiving</i>
<i>Tuesday, December 25</i>	<i>Christmas Day</i>



# Clara Shortridge Foltz: Opening Doors For Women To Become Notaries

BY GAIL R. DELANEY ON MARCH 05, 2018 IN NOTARY NEWS  
– SUBMITTED BY SAN DIEGO LSA

They say necessity is the mother of invention, but in the case of Clara Shortridge Foltz, a mother's necessity paved the way to many firsts for women — including becoming California's first woman Notary — that have since molded our nation and our justice system.

Clara and innumerable determined women like her fought hard to break barriers and open doors for future generations, and it is these inspiring individuals who we honor during Women's History Month.

Born in Indiana in 1849, Clara's early adult life was akin to most women of the time. She married at 15, moved to California with her husband as he sought work, and took care of her husband, children, and home. It wasn't until her womanizing spouse left her alone to care for five children did Clara step outside the confines of a woman's place in the 19th century.

She didn't just step, she leaped. And she broke down walls as she went.



## BECOMING A TRAILBLAZER

The daughter of a lawyer and preacher, Clara was familiar with the practice of law. At the time, there was no law school in California, so beyond apprenticing in a law office and applying to the court, the requirements were minimal. One must have been a resident in the state for six months, be of high moral character, and be a "white male citizen."

That law changed because of her. She authored the Woman Lawyer's Bill, which changed the language from "white male citizen" to "any citizen or person," clearing the path for future female attorneys.

And so, Clara became a lawyer in 1878. The very first female to practice law in the state of California. That was only the beginning. Her list of "first" accomplishments is lengthy and ambitious:

- First woman to attend Hastings College of Law (an education she desired, even though she was already a practicing lawyer).
- First female deputy district attorney in the United States.
- First woman prosecutor to try a murder case.
- First female clerk on the State Assembly's Judiciary Committee.
- First woman appointed to the State Board of Corrections.
- One of the original suffragettes to vote in 1911.
- First female commissioned Notary Public in the state of California.

## CHAMPIONING WOMEN'S RIGHTS

Clara was an eloquent lecturer and prolific writer. She contributed articles to publications such as New Northwest and the San Jose Mercury. She also founded and wrote for the San Diego Daily Bee and The New American Woman magazine.

She remained a staunch advocate for women's rights and for social reform that has stretched forward even to today. She fought for state and constitutional changes guaranteeing access to jobs and education for women. The birth of our public defender system is attributed to Clara, who believed the concept of innocent until proven guilty could not be properly enforced without adequate legal counsel.

Never one to slow down, at the age of 81 Clara ran for governor of California; perhaps one of the few goals she failed to accomplish when she lost the election.

When speaking of her accomplishments, Clara said, "Everything in retrospect seems weird, phantasmal and unreal. I peer back across the misty years into the era of prejudice and limitations, when a woman lawyer was a joke... but the story of my triumphs will eventually disclose that though the battle has been long and hard-fought it was worthwhile."

*Originally published by the National Notary Association, 9350 De Soto Ave., Chatsworth, Calif., 91311-4926, and reprinted with permission. Contact the NNA at (800) 876-6827 or online at [NationalNotary.org](http://NationalNotary.org).*

*<https://www.nationalnotary.org/notary-bulletin/blog/2018/03/clara-foltz-woman-notaries>*

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# STOCKTON-SAN JOAQUIN COUNTY LEGAL PROFESSIONALS ASSOCIATION

INVITES YOU ALONG ON A

## California Road Trip! \*

\* All roads lead to Stockton

### LSI 1<sup>ST</sup> QUARTERLY CONFERENCE AUGUST 17-19, 2018

#### CONFERENCE REGISTRATION FORM



Name (as it will appear on badge):

Mailing Address:

City/State/Zip:

Contact Telephone:

Work Telephone:

Email address:

Local Association (please spell out):

PLEASE INDICATE IF YOU ARE:

\_\_\_\_\_ State Officer

\_\_\_\_\_ State Chairman

\_\_\_\_\_ Governor

\_\_\_\_\_ CCLS \_\_\_\_\_ PLS

SCRIP (includes Registration, Welcome Reception, Banquet and Brunch):

POSTMARKED ON OR BEFORE JULY 20, 2018

\$ 125.00

\$

POSTMARKED AFTER JULY 20, 2018

\$ 135.00

\$

INDIVIDUAL TICKETS:

\_\_\_\_\_ Registration PRIOR to July 20, 2018

\$ 20.00

\$

\_\_\_\_\_ Registration AFTER July 20, 2018

\$ 30.00

\$

\_\_\_\_\_ WELCOME RECEPTION (Friday)

\$ 25.00

\$

LUNCHEONS

\_\_\_\_\_ Presidents' Luncheon (Saturday)

\$ 27.00

\$

\_\_\_\_\_ Governors' Luncheon (Saturday)

\$ 27.00

\$

\_\_\_\_\_ Open Luncheon (Saturday) - Open to All

\$ 27.00

\$

CHOOSE ONE: \_\_\_\_\_ Lemon Grass Chicken Lettuce Wrap or \_\_\_\_\_ Portobello Mushroom Lettuce Wrap

\_\_\_\_\_ BANQUET (Saturday Evening)

\$ 60.00

\$

CHOOSE ONE: \_\_\_\_\_ Ribeye Steak \_\_\_\_\_ Chicken \_\_\_\_\_ Vegetable Napoleon

\_\_\_\_\_ BRUNCH (Sunday)

\$ 30.00

\$

TOTAL AMOUNT ENCLOSED

\$

Special Dietary Restrictions

**PLEASE MAKE CHECKS PAYABLE TO SSJCLPA AUGUST CONFERENCE**

**RETURN THIS FORM WITH PAYMENT TO REGISTRATION CHAIR:**

**Jan Kuykendall, 11662 N. Ham Lane, # 41, Lodi, CA 95242;**

For questions call Jan Kuykendall evenings at 209 747-4781 or email [ks24fanatic@aol.com](mailto:ks24fanatic@aol.com) or

Colleen Young at 209- 609-4042 or email [youngns@comcast.net](mailto:youngns@comcast.net)

**NO REFUNDS AFTER JULY 20, 2018**

# STOCKTON-SAN JOAQUIN COUNTY LEGAL PROFESSIONALS ASSOCIATION

INVITES YOU ALONG FOR A

## California Road Trip! \*

\*All Roads Lead to Stockton

LSI 1<sup>ST</sup> QUARTERLY CONFERENCE

AUGUST 17-19, 2018



**Stockton Hilton Hotel**  
**2323 Grand Canal Blvd**  
**Stockton, CA 95207**

Room Reservations: \$134.00 Single/Double

Group Code: LPA18

Please contact the hotel at 800 445-9667 and request the group rate, or

Book online at: <http://group.hilton.com/LegalProfessionalsAssociation>

Check in 3:00 pm / Check out 12:00 pm

Free Wi-Fi ✦ Free self-parking, valet parking not available ✦ mini refrigerators  
24-hour business center ✦ pool and fitness center

FOR ADDITIONAL INFORMATION CONTACT:

Conference Co-Chairs - Jan Kuykendall at 209 747-4781 evenings; [ks24fanatic@aol.com](mailto:ks24fanatic@aol.com) or  
Colleen Young at 209 609-4042; [youngns@comcast.net](mailto:youngns@comcast.net)





LYNNE PRESCOTT, CCLS, is a legal secretary with Messing Adam & Jasmine LLP, a labor and employment law firm specializing in public sector labor law in Sacramento. She has been a legal professional for over 30 years, primarily focusing on litigation, legislative/regulatory law, and administrative law. She is a past president and member of Sacramento LSA, and currently serves as LSI's Executive Secretary.

# The Highest Standards of Professional Conduct

BY LYNNE PRESCOTT, CCLS, LSI EXECUTIVE SECRETARY

When I first began my legal career, I was a receptionist in the Inyo County District Attorney's Office. I'd had some previous experience in clerical work and how to act in an office environment, but it was a whole different world when I stepped into the legal profession. Part of my training had to do with conducting myself properly and professionally as a representative of the D.A.'s Office. This training was considered to be just as critical as the legal and receptionist duties I performed. Manners, common courtesy, respect, self-control, and politeness were the standard, as well as the expectation.



Sadly, it appears that we have reduced, or perhaps even forgotten, the importance of training our valued workforce members in the art of common courtesy and good business behavior; in other words, the standards of professional conduct. Merriam-Webster defines professionalism as: (1) characterized by or conforming to the technical or ethical standards of a profession; and (2) exhibiting a courteous, conscientious, and generally businesslike manner in the workplace.

In this fast-paced, technology-driven world, where seemingly everything is more lax and casual, you may wonder if anyone even notices or cares about professional conduct or "exhibiting a courteous, conscientious, and generally businesslike manner" these days. Believe it or not, people DO notice. Your boss, your clients, and your coworkers care about your level of professionalism. So do the other people you deal with on a regular basis, i.e., other law offices, the courts, legal vendors, service providers, etc. They will notice if you lack this quality and it could have severe consequences for your office, or even your career. To minimize the importance of professionalism would be a big mistake.

Recently my firm was holding a deposition in our office, and when the court reporter arrived, she presented herself in the following manner: *"Hi, I'm the court reporter."*

Period. She did not offer her name, the name of the court reporting agency she was from, or what deposition she was appearing for. I was very tempted to extend my hand and say, "Hi, I'm the legal secretary." Of course, I didn't (and I wouldn't), but I was truly taken aback by the way she presented herself. This kind of business manner is not something her employer would be pleased to hear about, I'm sure, and I would not be surprised if this kind of conduct cost the court reporting agency future business.

On the same day, opposing counsel and the deponent arrived for the same deposition and announced themselves as follows: *"We're here for the deposition."*

Period. If you thought I was surprised before, I was flabbergasted at this. Again, no names or firm references were provided and they did not state which deposition they were appearing for. Fortunately, our office was only holding one deposition that day.

So, I'm standing there thinking, "Okay . . . you ARE wearing a suit and a tie, and you ARE carrying a briefcase, and you DO seem to know that there is a deposition occurring in our office today." But what's to stop anyone from entering a law office and presenting themselves similarly? What if this was someone intent on doing harm?

I wanted to say, “Really? You’re an attorney and this is how you present yourself to another law office? And in front of your client?” Of course, I didn’t (and I wouldn’t). I promise I am not making this up – it truly happened (and, yes, I do have a very sassy inner voice sometimes). But, based on his lack of professionalism, I would definitely think twice about hiring someone like this as my attorney, or referring someone to him. Again, the way one presents oneself can create or damage business.

Below are some basic rules of professionalism and conduct of which we should all be aware and practice in our daily business interactions.

### BE COURTEOUS AND RESPECTFUL

We work in a very visible and highly-critiqued industry. Courteousness is being friendly, polite and well-mannered, with a gracious consideration towards others. This applies to clients, coworkers, bosses, and others we interact with in our profession. It makes social interactions in the workplace run smoothly, avoid conflicts, and earns respect. Respect is a positive feeling of esteem or deference for a person or organization; it is built over time and can be lost with one inconsiderate action.

Use polite, respectful references such as “Sir” and “Ma’am.” Likewise, use the basic courtesies of “Please” and “Thank you.” When in an association meeting, remember to address the Chair as Madam President or Mister President.

Use eye contact and be genuine in your interactions.

### REMEMBER BASIC ETIQUETTE

How many times have you answered your office phone, only to hear the caller say, “Can I speak to John?” No identifying who they are, what the call is in reference to, etc. Of course, this means you then have to play 20 questions with the caller. Don’t be that caller. Remember to announce yourself, where you’re calling from, and the purpose of your call. Be polite and speak in a pleasant tone of voice. It may seem old-fashioned, but trust me, a little professionalism goes a long way!

Try to remember to use the word “Goodbye” when ending a telephone call. Goodbye is infinitely more professional than “Bye-bye.” I was told very early on in my career, “Bye-bye is how you talk to babies.”

Unless you have been instructed otherwise, always use Mr. or Ms. and last names for clients, attorneys, and guests. Again, this is a sign of respect. Also, even if you are on a first-name basis with your boss, always address him or her as Mr. or Ms. when speaking to a client or non-office

members. This conveys to the other party that you respect your employer enough to use their professional title.

When a guest or client comes to the office, be pleasant, welcoming, and introduce yourself.

*“Hi, Mr. Smith. I’m Lynne, Mr. Anderson’s assistant. Take a seat and I will let him know you’re here.”*

*“Nice to see you again, Mrs. Jones. Mr. Anderson will be right with you.”*

*“Hi, I’m Lynne, Mr. Anderson’s assistant. The deposition will be taking place in Conference Room B today, so you can set up in there. If you need anything, please let me know.”*

### BE HONORABLE AND ACT WITH INTEGRITY

Honorable action is behaving in a way that portrays “nobility of soul, magnanimity, and a scorn of meanness,” which is derived from virtuous conduct and personal integrity. This is a concept of “wholeness or completeness” of character which is in line with certain values, beliefs, and principles, together with action and outcome. Remember the old saying about character – “Character is who you are, even when no one is looking.”

### WATCH YOUR MOUTH

Swearing, cursing, or cussing—whatever you call it—has no place in most workplaces. Unless you know it is okay in yours, refrain from using foul language. Some firms, such as the firm I work for, represent a clientele where cursing is part of the communication style with those clients, so hearing the occasional “F” bomb or similar type of language is not unheard of. Even if that type of culture exists in your firm, ask yourself if that is how you want to be thought of or how you really want to communicate. A good rule of thumb is if you wouldn’t say it to your grandmother, don’t say it at work.

### DON’T GOSSIP

While you may be tempted to tell your cubicle neighbors what you heard about Mike or Linda, gossiping makes you look like a middle school student. If you know something you simply must share, tell someone who has nothing to do with your workplace, like your sister, mother, or best friend. Similarly, don’t gossip about members of your association or LSI members. Your words can have unintended harmful effects, and do you really want to be that person?

*Continued on page 24*

*Continued from page 23*

### **DON'T AIR YOUR DIRTY LAUNDRY**

While confiding in a close friend at work is usually okay, sharing too much information with the entire office is not. Be discreet about who you talk to, particularly when it comes to discussing problems you are having with your spouse or other family members. How awkward will it be when you bring your spouse to the firm picnic after you've told everyone in the office about his substance abuse problem or shared your personal woes all over social media?

The same applies to discussing the business of your local association. Issues discussed among Board members should remain within the confines of the Executive Board. Even sharing specific details of issues in your association with someone in a sister association can have unintended consequences. Certainly, none of these issues should ever be broadcast on social media or the internet.

### **TRY TO STAY POSITIVE**

Negativity is contagious. If you complain constantly about your workplace, it will bring others down, and people WILL notice. Your boss certainly will not appreciate a drop in morale among the staff. That does not mean you shouldn't speak up about things you think are wrong. If you see something that should be fixed, give your boss feedback along with a plan for how to make improvements. If you are just complaining for no reason, stop.

### **OBSERVE CONFIDENTIALITY**

Confidentiality is respecting the set of rules or promise that restricts you from further and unauthorized dissemination of information. Over the course of your career, information will be passed on to you in confidence, either from your office, clients or colleagues. It is important to be true to such confidences; you gain trust and respect of those confiding in you and increase your influence within the organization.

Remember that confidentiality includes not discussing clients or cases, or even association matters, in the presence of non-office and non-association members, including friends and family members. Be mindful of common areas used by others, such as bathrooms, corridors, parking garages, elevators and the like, when discussing work matters or association business. This is especially true when using cellphones.

### **IN CONCLUSION**

Those of us in the legal field – legal professionals – must adhere to and hold ourselves to “the highest standards of professional conduct,” even when others do not. As we are all aware, California, just like most other states, has even established Rules of Professional Conduct for legal practitioners. And remember, those rules extend to the support staff employed by legal practitioners.

Members of Legal Secretaries, Incorporated are also expected to adhere to the LSI Code of Ethics, which reads as follows:

“It shall be the duty of each member of Legal Secretaries, Incorporated, to observe all laws, rules, and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence and diplomacy, in accordance with the highest standards of professional conduct.”

This includes how we conduct ourselves as members and officers of our local association, and members and officers of LSI. Unfortunately, I have been witness to more than one example of a dispute, calling-out, or full-on “rant” in meetings, outside of meetings, and worse, on social media, by and between members. Not only is such behavior against everything LSI stands for, it is a violation of the LSI Code of Ethics and the absolute height of unprofessional conduct. Such conduct is not something you want to have as your personal or professional “label.”

Professionalism is not an old-fashioned, bygone concept. It is something we should all aspire to and willingly embrace. Set the good example. Applying the foregoing principles can help you reach that highest standard of professional conduct, but it is not complete until you impact that knowledge on those around you. Teach those that will come behind you so that the standard remains high and preserved. You must show and lead by example. As the saying goes, “Be the change you want to see.”

**LS**





California Certified Legal Secretary  
A Program of LSI®



## APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LSI Membership Card (if applicable), and fees to:  
**April K. Ignaitis, CCLS, CCLS Certifying Board, P.O. Box 2879, Cupertino, CA 94015**

(Select one) ☐ **Northern California** ☐ **Saturday, March 17, 2018**  
☐ **Southern California** ☐ **Saturday, September 15, 2018**

- **Deadline:** Applications must be received **60 days** prior to the examination date.
- **Late Application:** Late Fees apply when Applications are received less than **60 days** (but not less than 30 days) prior to the examination date, and accepted only if space is available.
- **Deferral:** Requests to defer to the next exam must be received at least **30 days** prior to the exam date.

EXAMINATION FEES (Select Payment Type)	Check <input type="checkbox"/> Payable to "LSI" Mail to above address	PayPal <input type="checkbox"/> Email exam application to <a href="mailto:CCLSCertifyingBoard@gmail.com">CCLSCertifyingBoard@gmail.com</a> . Payment link will be provided upon confirmation of eligibility to sit for exam.	
<b>LSI Members</b> <input type="checkbox"/>		<b>Non-LSI Members</b> <input type="checkbox"/>	
On Time Registration Fee	\$ 25.00	On Time Registration Fee	\$ 75.00
Examination Fee*	100.00	Examination Fee*	100.00
Late Fee (if applicable)	30.00	Late Fee (if applicable)	30.00
<b>TOTAL DUE w/o Late Fee:</b>	<b>\$125.00</b>	<b>TOTAL DUE w/o Late Fee:</b>	<b>\$175.00</b>

### Personal Information

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Mailing Address: \_\_\_\_\_

Last 4 digits of SSN: \_\_\_\_\_ Email: \_\_\_\_\_

Phone (Day): \_\_\_\_\_ Phone (Evening): \_\_\_\_\_

LSI Member: ☐ Yes (enclose copy of LSI Membership Card) ☐ No

Name of Local LSI Association: \_\_\_\_\_

### Employment Information

Provide your legal secretarial employment information beginning with your most recent (or current) employment in order to confirm that you have at least two years' experience. Attach a supplemental page if you have not been in your current position for two years.

Position: \_\_\_\_\_ Dates of Employment: \_\_\_\_\_

Employer: \_\_\_\_\_  
(name and address)

Supervisor: \_\_\_\_\_ Supervisor's Phone: \_\_\_\_\_

Supervisor's Email: \_\_\_\_\_

Summary of Duties: \_\_\_\_\_

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

Date: \_\_\_\_\_

Applicant Signature \_\_\_\_\_

\*Fees subject to change without notice.

Rev. February 2017



JUDY CARTER RELEFORD received a B.A degree in Communications from Pepperdine University and a M.A. in Management from University of Phoenix. Judy has worked with the BigHand Create product (formerly known as iCreate), since 1997. Today, Judy is an integral part of the BigHand team as Director of Client Development where she enjoys participating in international business development efforts, contributing to industry thought leadership and delivering training via weekly webinars. She can be reached at [judy.releford@bighand.com](mailto:judy.releford@bighand.com).

# Top Features To Look For When Shopping For New Document Template Tools

BY JUDY RELEFORD

Whether it is recent changes in the document template landscape or simply a desire for improving productivity, many law firms find themselves on the hunt for new document template tools.

For legal secretaries, the hot new document templating features allow them to improve efficiency and job satisfaction as they tackle some of their more tedious and time-consuming, yet critical, tasks such as creating flawless tables of content and consistent page numbering. However, the firm needs to select the right tools with the right features in order to realize all the potential benefits. Otherwise, the wrong tool could actually decrease productivity and lead to increased friction between secretaries, attorneys and clients.

Here are five things that legal secretaries and their firms should look for when selecting new document template tools.

## 1. Evaluate whether the template's workflow is realistic

When considering new document template approaches, firms need to understand who is really drafting documents and who will be using the tools. Without a thorough assessment, firms may end up selecting tools that don't match the approaches of anyone at the firm.

This question used to have a simple answer, since drafting and formatting documents was once the realm of secretaries. That is no longer necessarily the case because many attorneys, particularly younger ones, handle at least some aspects of document creation.

It is important that firms understand their workflow processes, because attorneys and legal secretaries tend to approach document creation differently. Secretaries often prefer to perform tasks in a linear way, starting at the beginning and following one step after the next until the document is done. Attorneys do not always start with the



shell of a document and proceed methodically. Instead, they often start with the main content, then build out small details. Attorneys will probably not embrace a workflow that requires them to start at the beginning and answer each small question, such as selecting a salutation, before they are allowed to proceed to the next step.

If workflow tools cannot be customized for how firms work, secretaries and attorneys alike will become frustrated and will not adopt the new approach.

## 2. Does the tool allow for safely reusing existing document information and content?

The quickest way to create a new document is to reuse and resave existing files. However, simply renaming old documents can lead to significant inconsistencies and inaccuracies. Secretaries may inadvertently choose an outdated file or one that is different from the document that a secretary in another office is using for a similar task. Firms should look for a system that allows for a global method for storing frequently used content.

## 3. Can everyone use the template's document cleanup tools effectively?

For many years, legal secretaries often faced the nightmare of corrupted documents that required extensive cleanup. Today, cleaning up documents rarely requires dealing with infected files. Legal secretaries instead find themselves dealing with documents that have been converted from PDFs or that have been scanned. When files have been converted or scanned, they can lose original page numbers and other

important features. Any tool the firm adopts should allow for accurate cleanup methods that are intuitive enough for secretaries and attorneys to use easily and accurately.

#### 4. Is the system flexible enough for clients and other firms to adapt documents when necessary?

Many template tools use proprietary technology. When firms send files to clients that have been created with proprietary software, those documents are basically locked. Recipients can't update or modify documents unless they are also using that particular type and version of software. And when secretaries receive files from other firms and clients, those cannot necessarily be easily and accurately updated either. This hampers response time and leads to poor client service.

Proprietary technologies can also lead to headaches within firms, when secretaries must work with legacy documents that were created using different or outdated software.

Firms should look for more open systems that allow for working with sections on-the-fly, so documents can be adapted by anyone on the team, regardless of where the documents originate.

#### 5. Does the product lend itself to easy training?

Template technologies need to be intuitive and present a familiar interface, so that new hires and current users can leverage their existing Word knowledge when creating documents. This will make training easier and encourage adoption and usage.

#### Conclusion

Document creation can be highly labor intensive, and even small changes can require redoing hours of painstaking labor. Creating beautiful, solid documents should be a source of pride for legal secretaries. However, it is difficult for secretaries to feel confident about documents that may have fundamental flaws where a single edit could lead to disastrous changes.

For example, one secretary would forbid attorneys at her firm from altering any documents once she had finalized the table of contents. She worried that any change would cause a ripple of errors throughout the document. She didn't realize that the tool the firm was using allowed for automatic, accurate updates.

The right template tools will minimize many of the more annoying day-to-day aspects legal secretaries face with document creation. With these new tools, secretaries and attorneys can spend less time on monotonous tasks and more time on work that is interesting and useful for clients.

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#### ANSWERS FROM QUIZ ON PAGE 18

### CCLS QUIZ: ANSWER KEY

- |    |   |     |   |
|----|---|-----|---|
| 1. | B | 6.  | B |
| 2. | B | 7.  | A |
| 3. | A | 8.  | A |
| 4. | B | 9.  | B |
| 5. | A | 10. | A |



# The Dark Side of Cloud Computing

BY SHARON D. NELSON, ESQ. AND JOHN W. SIMEK, © 2018 SENSEI ENTERPRISES – SUBMITTED BY ORANGE COUNTY LSA

We have said for many years that the cloud will generally protect a law firm's data better than the law firm would itself. As more and more law firms adopt Microsoft Office 365, thereby moving to the cloud, we have come to the conclusion that a few words of caution are in order when law firms entrust their data to the cloud.

With huge volumes of law firm confidential data (and data from other verticals) moving to the cloud, it is no wonder that the bad guys are taking aim at the clouds. And there seems to be a shift afoot, in which the main responsibility for protecting corporate data in the cloud belongs to the cloud customer rather than the cloud provider.

The Cloud Security Alliance (CSA) recently issued the latest version of its Treacherous 12 Top Threats to Cloud Computing Plus: Industry Insights report.

While there are many security concerns in the cloud, CSA's list focuses on 12 concerns specifically related to the shared, on-demand nature of cloud computing. CSA conducted a survey of industry experts to gather professional opinions on the greatest security issues involving cloud computing. In order of severity, here are the 12 risks.

## 1. Data breaches

Data breaches can result from human error, application vulnerabilities, poor security practices – or they can be the result of a targeted attack. The data uncovered might be personally identifiable information, health records, financial information, trade secrets, intellectual property, etc. In our judgment, this is consistently the major concern for law firms.

## 2. Insufficient identity, credential, and access management

Criminals pretending to be legitimate users, operators, or developers can read, modify, and delete data; issue control plane and management functions; snoop on data in transit or release malicious software that appears to originate from a legitimate source according to CSA.

## 3. Insecure interfaces and application programming interfaces (APIs)

Cloud providers expose a set of software user interfaces (UIs) or APIs that customers use to manage and interact with cloud services. Provisioning, management, and monitoring are all performed with these interfaces, and the security and availability of general cloud services depends on the security of APIs. Clearly, they need to be designed to protect against accidental and malicious attempts to circumvent policy.

## 4. System vulnerabilities

System vulnerabilities are exploitable bugs in programs that attackers can use to infiltrate a system to steal data, taking control of the system or disrupting service operations. Vulnerabilities within the components of the operating system put the security of all services and data at risk. When there are multiple tenants in a cloud, systems from various businesses are placed close to each other and given access to shared memory and resources, creating a new attack surface. Not a great idea for law firms.

## 5. Account hijacking

Cloud services add a new threat to the landscape. If attackers gain access to a user's credentials, they can watch activities and transactions, manipulate data (truly, the manipulation of data may be scarier than a data breach), return falsified information and redirect clients to illegitimate sites.

## 6. Malicious insiders

We have seen this time and again in law firms. A malicious insider such as a system administrator can access potentially sensitive information. Now imagine that malicious insider working for your cloud provider . . . systems that depend solely on cloud service providers for security are at greater risk.

## 7. Advanced persistent threats (APTs)

APTs are a form of cyber-attack that infiltrates systems to establish a foothold in the IT infrastructure of target companies, from which they steal data. APTs work stealthily over extended periods of time, often adapting to or eluding the security measures intended to defeat them. APTs can move laterally through networks and appear to be normal network traffic to realize their goals.

## 8. Data loss

An accidental deletion by the cloud service provider, or a physical catastrophe such as a fire or earthquake, can lead to the permanent loss of customer data unless the provider or cloud consumer takes adequate measures to back up data, using best practices in business continuity and disaster recovery. Multiple backups tested regularly are a requirement.

### 9. Insufficient due diligence

Executives need to develop a good checklist for due diligence when evaluating cloud providers. Many rush aboard without a considered study of the cloud provider.

### 10. Abuse and nefarious use of cloud services

Poorly secured cloud service deployments, free cloud service trials, and fraudulent account sign-ups via payment instrument fraud expose cloud computing models to malicious attacks. Bad actors might leverage cloud computing resources to target users, organizations, or other cloud providers. CSA cites examples of misuse of cloud-based resources including launching distributed denial-of-service attacks, e-mail spam, and phishing campaigns.

### 11. Denial of service (DoS)

DoS attacks are designed to prevent users of a service from being able to access their data or applications. By compelling a targeted cloud service to consume inordinate amounts of finite system resources such as processor power, memory, disk space, or network bandwidth, attackers can cause a system slowdown and leave all legitimate service users without access to services. This is not a theoretical threat – it has happened time and again in spite of good faith efforts to defend against such attacks.

### 12. Shared technology vulnerabilities

Cloud service providers deliver their services scalably by sharing infrastructure, platforms or applications. In general, this is a good thing, keeping costs down and allowing customers to scale up or down as needed. Cloud technology often divides the “as-a-service” offering without substantially changing the off-the-shelf hardware/software. Underlying components that comprise the infrastructure supporting cloud services deployment may not have been designed to offer strong isolation properties for a multi-tenant architecture or multi-customer applications. Shared technology vulnerabilities present a serious cybersecurity risk.

We are not trying to scare law firms away from cloud computing (just to be careful!), but it's worth noting a study from last summer. A post in RCRWireless News said that a cyber security incident that takes a top three cloud provider offline for three to six days could cause anywhere between \$6.9 to \$14.7 billion in economic losses and between \$1.5 and \$2.8 billion in industry insured losses. That is one among many findings in a report published by Lloyd's of London in partnership with the American Institutes for Research (AIR), which explores the impact a cloud failure could have on the economy.

The results of the report were based on the top 15 unnamed cloud providers in the U.S., which together constitute a 70% market share. In the event of three to six days of cloud downtime, the report found that Fortune 1000 companies will carry 37% of the ground-up losses and 43% of the insured losses. This is, obviously, particularly meaningful to very large law firms.

Businesses outside the Fortune 1000 are potentially at the greatest risk, carrying 63% share of economic losses and 57% of insured losses. Right out of the gate, we know that law firms consider being out of business 3-6 days unimaginable.

The corollary to a cloud disaster is mitigating your risk through cyber insurance. As the report says, "Organizations large and small are investing in risk and loss mitigation, including preventative security and post event recovery measures. The continued expansion of the cyber insurance market is both necessary and inevitable. Taking proactive measures now to build a risk-based cyber insurance ecosystem, ahead of the next truly catastrophic event, is essential to establishing more resilient communities and businesses."

Bottom line, the cloud is generally a good place to be for law firms, but it is not without its threats and complications. For solo/small firms, we prefer a hybrid cloud, where law firms own their own equipment which is secured by their IT provider in a datacenter where they have the assurances of redundant power and Internet connections. This environment does require more work in order to properly configure and secure the systems, but leaves access to the data in the hands of the law firm and not the cloud provider.

Reprinted with permission by Sharon D. Nelson, Esq. The authors are the President and Vice President of Sensei Enterprises, Inc., a legal technology, information security and digital forensics firm based in Fairfax, VA. 703-359-0700 (phone) [www.senseient.com](http://www.senseient.com)

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LEGAL SECRETARIES, INCORPORATED

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<b>LSI MEMBERSHIP BROCHURE</b> Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application.		N/C	
<b>LSI ROSTER*</b> Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.		N/C	
<b>NEW MEMBER PACKET*</b> 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	
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# 2017-2018 LSI Roster



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**President**  
JENNIFER L. PAGE, CCLS  
Cell: 415-710-3402  
E-mail: jlpagex@ix.netcom.com

**Vice President**  
HEATHER EDWARDS  
Cell: 818-632-6647  
E-mail: heatheredwardslsi@aol.com

**Executive Secretary**  
LYNNE PRESCOTT, CCLS  
Cell: 916-398-0120; Work: 916-551-3360  
E-mail: slprescott7@gmail.com

**Treasurer**  
ROD CARDINALE, JR.  
Cell: 408-461-0972  
E-mail: rodcardinalejr@sbcglobal.net

## APPOINTED OFFICERS

**Executive Advisor (Nominations and Elections Chair)**  
MARY J. BEAUDROW, CCLS  
Cell: 415-717-5675  
E-mail: marybeau59@att.net

**Parliamentarian**  
KRISTI L. EDWARDS, CCLS  
Cell: 415-497-9600; Work: 415-491-5000  
E-mail: kledwards@justice.com

**Editor-In-Chief, Publications Revision Committee (CEC)**  
KAREN J. JONES  
Home: 818-269-5750  
E-mail: karenjacobsonjones@gmail.com

**Editor, The Legal Secretary**  
BARBARA BARREGAR  
Cell: 949-285-5271  
E-mail: LSI.TLSeditor@gmail.com

**Educational Program Coordinator (CEC/Marketing)**  
J. CORI MANDY, CCLS  
Work: 619-515-3256  
E-mail: cori.mandy@procopio.com

**Historian**  
BRYANA SCHRODER, CCLS  
Phone: 415-796-5412  
E-mail: schroderb.lsihistorian@gmail.com

**Legal Specialization Sections Coordinator (CEC/Marketing)**  
DAWN R. FORGEUR, CCLS  
Cell: 916-601-1380; Work: 916-319-4786  
E-mail: dawn@forgeur.com or dawn.forgeur@stoel.com

## CHAIRMEN

**2018 Annual Conference Co-Chair**  
ANNETTE DAVIS  
Cell: 661-839-3423; Work: 213-330-8899  
E-mail: amarie50@me.com

**2018 Annual Conference Co-Chair**  
MAE CHESTER, CCLS  
Cell: 818-929-0328  
E-mail: mae.chester@yahoo.com

**Advertising (Marketing)**  
LARRY MCGREW  
Phone: 415-252-2780  
E-mail: lmcgrew@firstlegalnetwork.com

**California Certified Legal Secretary (CEC/Marketing)**  
TERRIE QUINTON, CCLS  
Cell: 951-294-1246; Work: 619-209-3056  
E-mail: Quinton@dsmw.com

**Career Promotion/Scholarship**  
SYLVIA MARSH  
Cell: 949-680-0825  
E-mail: emjscholarship@gmail.com

**Editor, The Legal Professional's Handbook (PRC)**  
LINDA LANE, CCLS  
Cell: 818-434-6600  
E-mail: llane44@yahoo.com

**Editor, Law Office Procedures Manual (PRC)**  
LISA DE LA O  
Cell: 818-590-3441; Work: 818-715-7025  
E-mail: ldelao@fitcheven.com

**Legal Procedures (CEC)**  
BECKY J. NEIDHARDT  
Cell: 619-892-0197; Home: 619-334-2524  
E-mail: becky.neidhardt@gmail.com

**Legal Professional Training/Seminars (CEC)**  
SHAYLENE CORTEZ, CCLS  
Cell: 951-768-8370; Home: 951-738-9829  
E-mail: ccls4me@ca.rr.com

**Professional Liaison/Day In Court**  
RACHEL MALERBI  
Cell: 916-217-5569; Work: 916-472-6228  
E-mail: rachel@jamisonfamlaw.com

**Social Media (Marketing)**  
ERIKA GARDUÑO  
Cell: 760-777-0380  
E-mail: lsi.socialmediachair@gmail.com

**Liaison to the Law Practice Management and Technology Section of the State Bar**  
MARRY S. ROCCA, CCLS  
Cell: 510-351-0154; Home: 510-865-0437  
E-mail: marysrocca@aol.com

## LEGAL SPECIALIZATION SECTIONS

**Coordinator (CEC/Marketing)**  
DAWN R. FORGEUR, CCLS  
Cell: 916-601-1380; Work: 916-319-4786  
E-mail: dawn@forgeur.com or dawn.forgeur@stoel.com

**Civil Litigation**  
DONNA DAY  
Cell: 510-303-8725; Home: 510-247-1208  
E-mail: wilderdays@sbcglobal.net

**Criminal/Family Law**  
MARY LOU FLOYD, CCLS  
Cell: 707-533-0128  
E-mail: louloux7@yahoo.com

**Federal**  
BETTINA JACOBSON  
Home: 916-616-8158  
E-mail: lssfed2016@gmail.com

**Law Office Administration**  
TAMMY L. HUNT, CCLS  
Home: 916-233-2544  
E-mail: loaleader@tlhunt.org

**Probate/Estate Planning**  
CARMEN VASQUES  
Phone: 805-757-2184  
E-mail: cvasques11@yahoo.com

**Specialty Law**  
DIANE MECCA, CP, CBA  
Cell: 209-918-0796; Work: 209-529-7254  
E-mail: dianemecca@hotmail.com

**Webinar**  
RENEE EVANS, CCLS  
Cell: 619-823-7332; Work: 619-235-3437  
E-mail: lsiwebinar@gmail.com

## PUBLICATIONS REVISION COMMITTEE

**Editor-in-Chief (CEC)**  
KAREN J. JONES  
Home: 818-269-5750  
E-mail: karenjacobsonjones@gmail.com

**Editor, The Legal Professional's Handbook (PRC/Marketing)**  
LINDA LANE, CCLS  
Cell: 818-434-6600  
E-mail: llane44@yahoo.com

**Editor, Law Office Procedures Manual (PRC)**  
LISA DE LA O  
Cell: 818-590-3441; Work: 818-715-7025  
E-mail: ldelao@fitcheven.com

**Assistant Editor**  
NORMA MARQUEZ  
E-mail: norma.a.marqz@gmail.com

**Assistant Editor**  
PAMELA SCHULD  
Cell: 714-797-5520; Work: 949-475-9200  
E-mail: kraftymomm@yahoo.com

**Assistant Editor**  
BETTY THOMAS  
Phone: 323-258-3435  
E-mail: bjthomas1946@aol.com

**Assistant Editor**  
JUDY JOHNS, CCLS  
Cell: 760-533-1405; Work: 619-338-6545  
E-mail: jjohns@sheppardmulin.com

## CCLS CERTIFYING BOARD

**Member (Chair)**  
APRIL IGNAITIS, CCLS  
Work: 408-795-3437  
E-mail: aignaitis@littler.com

**Member**  
SHARA J. BAJURIN, CCLS  
Cell: 650-619-8928  
E-mail: sbajurin@gmail.com

**Member**  
MAE CHESTER, CCLS  
Work: 818-929-0328  
E-mail: mae.chester@yahoo.com

**Member**  
BARBARA HAUSMANN, CCLS  
Home: 805-527-0662  
E-mail: zulustrike@outlook.com

**Member**  
VIVIAN SHREVE, CCLS  
Cell: 408-813-8272  
E-mail: vshreve@wsgr.com

**Attorney Member**  
MARLENE MURACO, ESQ.  
Work: 408-998-4150  
E-mail: mmuraco@littler.com

**Attorney Member**  
NELLIE J. AMJADI, ESQ.  
Work: 858-350-2241  
E-mail: namjadi@wsgr.com

## CONTINUING EDUCATION COUNSEL (CEC)

**Educational Program Coordinator**  
J. CORI MANDY, CCLS

**Editor in Chief**  
KAREN JONES

**California Certified Legal Secretary**  
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**Legal Specialization Sections Coordinator**  
DAWN R. FORGEUR, CCLS

## LSI CORPORATE OFFICE

**Administrator**  
KIM ORENO  
Work: 916-239-4089 or 800-281-2188  
E-mail: kim@lsi.org

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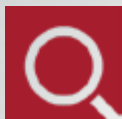
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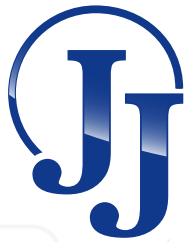


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840 N. Birch Street  
Santa Ana, CA 92701  
(714) 953-9451

### **Inland Empire**

455 W. La Cadena Ste. 17  
Riverside, CA 92501  
(951) 369-8369

### **Ventura**

801 S. Victoria Ave. Ste. 304  
Ventura, CA 93003  
(805) 650-9077