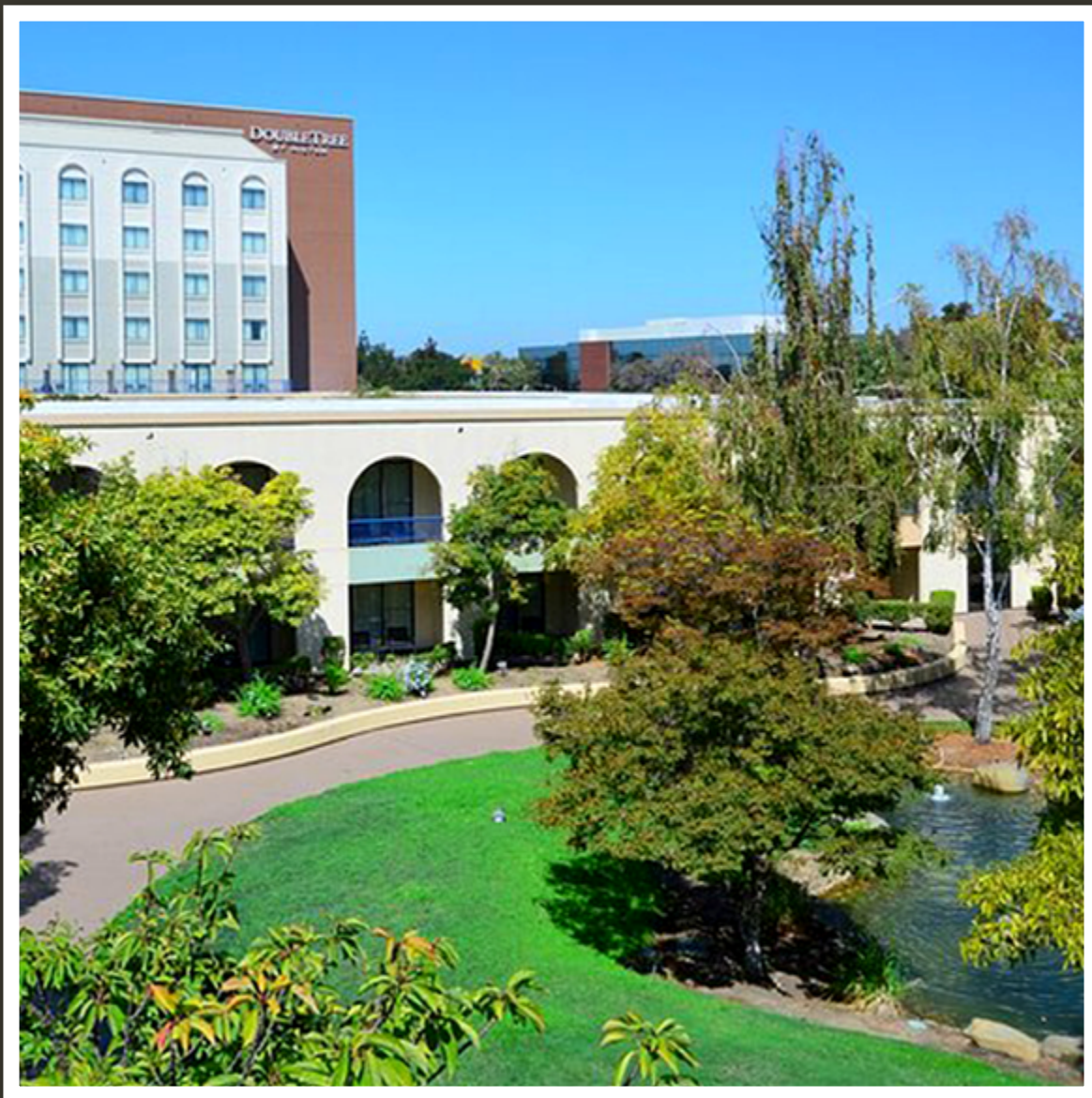


# THE Legal Secretary®

MAY 2019



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### THE LEGAL SECRETARY MAGAZINE

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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. — *Dedicated to LSI Past President, Joan M. Moore, PLS, CCLS*

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# President's Message

BY HEATHER EDWARDS, LSI PRESIDENT



HEATHER EDWARDS is LSI's President and has been a member of San Fernando Valley Legal Secretaries Association since 1991, the same year she joined the legal field. She obtained her Bachelor's Degree from California State University Northridge. In May 2006, LSI President Mary S. Rocca presented Heather with the President's Award. Heather resides in Northridge, California with her husband of 27 years Ernie, and their 4 children, Kennedy, Koree, Kaden and Kamden.

*"The best is yet to come." — William Shakespeare*

As we begin our new fiscal year, we have so much to look forward to. May 1, 2019 marks the beginning of our 85th year! Congratulations to every member of LSI past, present, and future for believing in our illustrious and esteemed organization. What began as the California Federation of Legal Secretaries by a few legal secretaries, has blossomed into a statewide corporation providing stellar education to California's legal professionals.

The members of LSI pride themselves on excellence through continuing legal education, building our membership, and professional development. We have an incredibly strong 85 year old foundation. To have the opportunity to be a part of something that provides personal and professional growth is what we strive for. We have made and continue to make remarkable progress in transforming our 85 year old organization into the number one "go-to" resource for every legal professional.

Many exciting things have transpired this past year. The Marketing Committee, through the leadership of Lynne Prescott, CCLS, Marketing Coordinator, is working diligently on our two year marketing plan to move LSI forward with their massive and aggressive campaign to reintroduce LSI to the world with #MeetLSI. This will soon include a reintroduction of [www.lsi.org](http://www.lsi.org). In the very near future, you will be able to get continuing legal education and webinars on the fly through your mobile device with our mLearning (Mobile Learning) through our LSI app currently under development. You currently have the capability to become an E-Subscriber. At the click of a button, you can now sign up at no cost to receive our notifications and important information directly into your inbox.

The fiscal year for Legal Specialization Sections is May 1 through April 30, and membership renewals are just around the corner. Please be sure to renew your membership soon. If you are not a member of one or all of the Legal Specialization Sections, you are missing a wonderful opportunity for quality education at an outrageously minimal cost. The Legal Specialization Section Leaders never cease to amaze me with the creative topics for their workshops and webinars.

I hope you have stepped outside your circle of comfort a bit and seized the opportunity to attend conference, educational workshops, rekindle old friendships, and make new friends. This is an exciting time for LSI. Choose to be a part of this excitement. It just takes T.E.A.M. work. Thank you for choosing to be a part of LSI. I look forward to another great year and Together we Empower & Accomplish More as one. We are T.E.A.M.

LS



# Meet the LSI Executive Committee

As part of the Meet LSI Campaign, *The Legal Secretary* has introduced you to many of the chairmen and appointed officers of LSI. In this issue, we are pleased to have you meet the members of the LSI Executive Committee.

## Parliamentarian – Kristi L. Edwards, CCLS



Kristi says she totally fell into what turned out to be a wonderful career in 1983, when her daughter was just one year old. She had caught the attention of the local attorney while working at the one bank in the (very small) town. He asked her to do some bookkeeping for him while she was on leave from the bank after the birth of her daughter. She says, “the rest is history.”

According to Kristi, she finally attended a Marin County LPA (MCLPA) meeting over a year after she joined the association, because she lived and worked about an hour away from the meeting locations (and she was kind of shy about joining). It just happened to be Jennifer L. Page, now CCLS, and the MCLPA President both now and then, who invited her to the meeting. She says she kept going back to the meetings because she loved finding out how other law offices worked. “I was employed by a crazy attorney, and I just couldn’t believe all law offices could be run like his. I joined primarily to find out if my skills were good enough to work in another office, but it turns out that was unnecessary - I’m still employed by that original office, just in a different configuration.”

At the local level, Kristi has held all the elected positions and served as chair for “a bunch of standing committees.” She says she liked being Governor the best “because you got to go to conference, represent your association, and vote!” She still enjoys being on the Professional Liaison Committee and has worked hard to develop a relationship with the local bar association, which is finally paying off.

When asked about her first LSI Conference, Kristi says, “I think my first conference was in Alameda when Mary Rocca was installed as LSI President. The thing I remember most was being blown away by the professionalism of all the LSI officers. They were all such impressive women, and I thought ‘if this organization can produce officers of that caliber, I want to be a part of it!’” She kept coming back to conferences for the educational opportunities and the chance to network with people from all over the state who practiced in her area of probate law. “The travel and the inspiring speakers are also a big plus. I always feel revitalized when I get back to work after a conference.”

At the LSI level, Kristi states that she loved being the Probate Section Leader and working with the other LSS members and leader (she served three years in that position). She has also been a co-chair for annual conference, and has served as LSI Parliamentarian for the past three years. She says, “My current position as Parliamentarian is demanding on my time, but I appreciate the opportunity to learn about parliamentary procedure. I think it fits my skill set pretty well.”

The broad educational opportunities are the foremost reason Kristi continues to be a member of LSI - everything from the Legal Procedures blog to the CCLS program to the LSS seminars and webinars. The networking and being a part of the legal community are a close second. As LSI Parliamentarian, Kristi’s position in an appointed one. She states, “Fortunately, I did not have to run for this office and commit to ten (10!!!) years. I was extremely honored to be asked to serve by two people whom I respect a lot.”

Kristi says she believes the most important things LSI needs to do to remain relevant and keep moving forward are to market itself appropriately and open its doors to all legal professionals who need beginning and continuing legal support education. “Expanding the online education is imperative. We need to be the ‘go to’ place to look for this or the organization will not survive.”

When asked what legacy she wants to leave as a legal professional and LSI officer, Kristi says, “I want to be a part of sustaining LSI and helping it adjust to the new environment. Change and growth can be painful, but it’s vital if the organization is to survive. I am ready to be a mentor, and I would like to see the vast pool of legal knowledge held by the members of LSI shared with those entering the field.”

## Executive Advisor – Jennifer L. Page, CCLS



Jennifer began her legal career in 1990. After being let go from several administrative assistant positions, she realized she really needed some sort of education to get her past the last-hired, first-fired cycle, and came upon a paralegal certification program. The

CONTINUED ON PAGE 4

## MEET THE LSI EXECUTIVE COMMITTEE

*Continue from page 3*

first time she attended a local association event was after she received a flyer in the mail at the firm she was working for in 1991, when Marin County LPA hosted a Membership Drive meeting. She says she has been hooked ever since, and it's been the networking, education, meeting new people, and making lifelong friends that has kept her coming back.

With the exception of the office of secretary, Jennifer has held every position in her local association. She says that each one brings its own pluses and minuses, but being the Vice President/Membership Chair was probably her favorite, as she got to initiate new members and welcome them to the group.

When asked if Jennifer remembered her first LSI Conference, she said, "Yes, it was an annual conference at the Oakland Airport Hilton. I was absolutely dumbfounded when I walked into the General Session. I was so impressed with everything about it -- from the ballroom full of people, to the camaraderie, and celebrating as each contest winner was announced. I was amazed at the EC and other officers and chairmen; how they conducted themselves, gave oral reports, etc. I was impressed with how professional everyone was." Jennifer says she kept coming back to LSI conferences after that because she was asked to serve as Governor for her local association, and then she "just couldn't stop going!" Again, it was the networking, education and meeting likeminded people. Jennifer said, "I just couldn't not attend conferences. I felt I owed it to my employer to be as educated as I possibly could, and this was the place to do it."

At the LSI level, Jennifer has held the position of Legal Procedures Chair, LSS Leader - Civil Litigation (for one year and then again for two years), LSS Coordinator, CEC Coordinator, Treasurer, Executive Secretary, Vice President, and President. She currently serves as LSI's Executive Advisor. She says her favorite position was serving as President. "Not sure exactly why - but I really enjoyed that position the most." She says she "never had any intention of running for LSI office, but after serving in the various chairmanships, I realized that I had something to offer LSI. And why not run? It's been one of the most rewarding experiences ever."

When asked why she continues to be a member of LSI, or why LSI is important to her, Jennifer responded, "LSI provides me confidence in who I am as a legal support professional through the networking, education and interacting with likeminded people. I think it is a necessary relationship to have and, in fact, I think it should be mandatory to be a member. Where else and who

else offers what LSI has to offer? Being a legal support professional to me isn't just a job; it's a career, and in any career shouldn't you be the best you can be and be part of an organization that provides the kind of support, education and networking like LSI offers?"

Jennifer believes that one of the most important things LSI needs to do to remain relevant and keep moving forward is to focus on quality, not quantity. She states that quality education is the most important thing LSI can offer, both in person and online. "We just need to make sure the education we offer is top-notch and relevant."

The legacy that Jennifer wants to leave as a legal professional and LSI officer is two-fold: embracing change and inclusivity. She says, "I think during my term as President, I was able to change the attitude of the membership to think of the Executive Committee as approachable, that we are ALL part of the same team and it's not the membership versus the EC. During my term as President, we successfully added two categories of membership to LSI -- students and associate members -- which opens the doors of our organization to even more members."

### Executive Secretary – Rod Cardinale, Jr.



Rod entered the legal profession in January 2008, after graduating with his paralegal degree.

The first local association event he attended was a Santa Clara County LPA general membership meeting in June 2008, where he was invited by the President of SCCoLPA (and just happened to be one of his professors at paralegal school). He says he only attended that one meeting and didn't attend another until August of 2009, after which he attended two more meetings, and at the third one he was installed as President. At the local association level, Rod has held the position of Ways and Means Chair, President, Executive Advisor, and Treasurer. He states that he enjoyed being President the most.

The first LSI Conference Rod attended was Annual Conference in May 2010. Christa Davis was the outgoing President and Brooke Mansfield was the incoming President. He says, "I remember having such a great time. I told Elise Dresser, CCLS, how much fun I had, and what I thought we could do to lift SCCoLPA back up. I also told her at that conference that I wanted to host an annual conference. We hosted the best conference ever in May 2013. I served as conference chair. I have not missed a conference since I attended my first one in May 2010." When asked what keeps him coming back



to LSI conferences, Rod replied, “Spending time with the friends I have made through SCCoLPA and LSI. I enjoy the networking and being a part of a team. I feel very fortunate to have served LSI in various capacities since 2010, and look forward to the positions I will hold in the future.”

At the LSI level, Rod has served as the Legal Procedures Chair, 2013 Annual Conference Chair, Annual Conference Official Registrar and Assistant Registrar, Social Media Chair, and Treasurer. Rod currently serves as the LSI Executive Secretary. He says he has liked all of the positions he has held, and that being the LSI Treasurer has probably been the most rewarding, “but I assume serving as President will end up being my favorite.”

When asked why he continues to be a member of LSI, Rod states, “I continue to be a member because I signed up for the ten-year Executive Board commitment. Serving on the EC is important to me because I felt LSI was going down a path that wouldn’t be successful. I believe in LSI and its mission. I want to do everything I can to help make sure that this corporation is around for the next generation. I think we’re taking the correct steps to get us back on the right track, and I’m proud to be a part of it.”

Rod says he decided to run for LSI office because he thought he had some good ideas and the foresight to help guide LSI back into the 21st century. “I love being part of a team and I think we have a unique opportunity to reinvent LSI and help move the corporation into what the 21st century legal professional wants from a professional organization.” He says that he believes the most important thing LSI needs to do to remain relevant and keep moving forward is to change the name of the corporation to California Legal Professionals Incorporated or Legal Professionals Incorporated.

The legacy that Rod wants to leave as a legal professional and LSI officer is to be remembered as a legal professional who wasn’t afraid to step out of his comfort zone, who always wanted to learn, and was always driven to be the best. “As an LSI officer, I want to be remembered as somebody who was a team player, who always put the needs and wants of the corporation first. I want to be remembered as an officer who was not afraid to voice his opinion, not afraid of a challenge, and was instrumental in bringing LSI into the 21st century. Most importantly, I want to be remembered as an officer who left LSI in a better place than when I started, and an officer that was respected by my peers for my dedication to LSI.”

### Vice President – Lynne Prescott, CCLS



Working in the legal field was not Lynne’s first choice as a career. She moved from Alabama to California in 1979 to pursue a career in the music industry, but quickly learned that you can’t sing for your supper and began working as a receptionist in the Inyo

County District Attorney’s Office in 1983. She was later cross-trained by the D.A.’s Office as a legal secretary in both the Family Support and Criminal Divisions, which set her on a life-long path as a legal support professional.

Lynne was introduced to LSI in 1990, when a coworker invited her to attend a dinner meeting being held by Solano County Legal Secretaries Association. The camaraderie and professionalism among the members was what impressed her the most, while the education and networking was what kept her coming back. As a member of Solano County LSA, Lynne held the positions of Educational Training Chair, CCLS Chair, Quarterly Conference Co-Chair, Programs Chair, Secretary, Vice President, President (two terms), and Governor.

Since moving to the Sacramento area in 2004, Lynne has been a member of Sacramento LSA and has held the positions of Day in Court Committee Member, Programs Chair, Scholarship Co-Chair, Reno Bus Trip Chair, 75th Anniversary Gala Chair, Vice President, and President (two terms). Of the positions she has held on the local level, Lynne says that she enjoyed being Educational Training Chair, CCLS Chair, and Vice President the most.

The first LSI Conference Lynne attended was held at the Northern Queen Inn in Nevada City. In other words, all the events were not held at the hotel. There were Legal Specialization Section workshops held in the old historic courthouse, luncheons were held both on-site and off-site, etc. Lynne says it was like nothing she had ever experienced before, and the combination of the beautiful location, the fabulous agenda of meetings and educational workshops, and the time spent with fellow members made the whole experience unforgettable.

At the LSI level, Lynne has been the Law Office Administration Section Leader, Day in Court/Professional Liaison Chair, Treasurer, Executive Secretary, and currently serves as Vice President. She says it’s hard for her to pick a favorite out of those positions because she has learned so much from each one. Being LSI Treasurer taught her the most, and working with the Governors as Executive Secretary was the most fun and personally rewarding.

CONTINUED ON PAGE 6

*Continue from page 5*

Lynne states that she continues to be a member of LSI because there is nothing that can compare to the quality of education, continuous updates, and level of professionalism that LSI offers. “This organization offers so much to the legal support professional. All you have to do is take advantage of it. LSI has been there for me in every way - - personally and professionally - - supporting me, encouraging me, and helping me reach places in my career that I never dreamed I could reach. That’s why I decided to run for LSI office. LSI has given so much to me, and I knew I wanted to be part of the continuation of its legacy.”

When asked what she believes are the most important things LSI needs to do to remain relevant and keep moving forward, Lynne responded:

“LSI has to not only keep its finger on the pulse of what is happening in the profession, it must be a leader in the legal marketplace, always anticipating and being at the forefront of change and innovation. LSI must position itself to be the go-to resource for legal support professionals in California. We cannot afford to linger in the past and we cannot operate this corporation in 2019/2020 and the years ahead as we did in 1934; that model simply does not support today’s professionals in the way they need to be supported, nor does it reflect the future and direction LSI must pursue. The demands and requirements of our profession are getting more refined, technical, and specialized every day. If LSI is not positioning itself to help legal professionals meet those demands and requirements, then who will be? We MUST be ready to meet and exceed those needs.”

Lynne says that when people think of her as an LSI officer and career legal professional, she hopes they will remember her unequivocal belief in and passion for LSI. “I have been inspired by so many people during my career and as an LSI member and officer. I hope that I am, or have been, an inspiration to others also. I would like the legacy I leave to be one that strengthens LSI, embraces positive innovation and forward-thinking, promotes partnership and collaboration, and helps secure LSI’s place as a necessary resource and leader in the marketplace for generations to come.”

### President – Heather Edwards, CCLS



Heather fell into a legal career in 1990 when she was putting herself through college and working towards a degree in fashion merchandising and marketing. She needed a part-time job and had never worked in an office before, let alone a law office. She saw a job posting for a

part-time receptionist at a prestigious probate and estate planning law firm and applied for the position. At the time of the interview, her then-office manager took a chance and offered her the job as receptionist. Within two to three months, she was promoted to a junior legal secretary. Heather says, “Needless to say, when I graduated college, I did not go into fashion merchandising and marketing. I stayed in the legal field.”

San Fernando Valley LSA (SFVLSA) was Heather’s first introduction to a local association. Her coworker and dear friend, Sylvia M. Ellis, invited her to a meeting in 1991, and Heather still remains a member of that association today. She says she kept coming back because “SFVLSA continues to offer stellar monthly educational programs with excellent speakers. In addition to the educational programs, what keeps me coming back are the members. Many have been my dearest friends for over 28 years, and many of whom are serving at the LSI state level today.”

At the local level, Heather says that being the Hospitality Chair for SFVLSA was her very first and most favorite chair position aside from serving as SFVLSA President. She says, “It gave me a chance to welcome potential new members to SFVLSA and work with our long-time members. I graduated to 2nd Vice President of Programs, then 1st Vice President of Membership, and I was President of SFVLSA three times.”

Heather’s first LSI Conference was Annual Conference in May 1991. Caroline E. Van De Pol, PLS, CLA/CAS, CCLS, was President. Sylvia M. Ellis and an entourage of San Fernando Valley LSA members attended. “I remember how much fun I had attending workshops, meeting new people, the camaraderie of the weekend, and the structure of an LSI Annual Conference. The professional development aspect of conference, seeing my long-time LSI friends and colleagues, meeting new friends, and learning something new at each and every conference kept me coming back. It made me want to play a larger role in my own association and with LSI.”

Deanna A. Pepe, CCLS, PLS, LSI Past President 1996-98, offered Heather her first LSI chair position as Probate and Estate Planning Section Leader in 1996. She served in that position, as well as being President of SFVLSA, pregnant with her second child, and SFVLSA hosted an Annual Conference in May 1997, all in the same time period. She returned to serve as Probate and Estate Planning Section Leader from 2002-2004, and then as Legal Specialization Sections Coordinator from 2004-2006. She has also served as LSI Director of Public Relations, and Liaison to the Law Practice Management & Technology Section of the State Bar of California. Heather was elected LSI Treasurer in



2012, and has also served as Executive Secretary and Vice President. Heather is currently serving as LSI President. She says that being LSI President is, by far, her most favorite position.

When asked why she continues to be a member of LSI, Heather says, "I owe my entire legal career to LSI. I give back to LSI because LSI shaped and molded me into the professional I am today. I am LSI." She says she decided to run for LSI office "because I have served LSI for most of my life and I felt I owed it to LSI to serve as an Executive Officer to make a positive difference in its members and to move this corporation forward."

Heather responded as follows when asked what she believes are the most important things LSI needs to do to remain relevant and keep moving forward:

"LSI needs the future generation of legal professionals. We need to grow our virtual learning (mobile learning or 'mLearning') by offering phenomenal educational

programs, workshops, and classes for both new and long-standing legal professionals. LSI needs to preserve our legacy past, present, and future."

Regarding the legacy that she would like to leave, Heather states, "I have always believed there is no higher calling than to be of service to others. By living and working with a spirit of service, we have an opportunity to leave a powerful legacy to the world. My parents always encouraged me to make the world a better place and to live by the Golden Rule, 'Do unto others as you would have them do unto you.' I would like to be remembered as an LSI President who served to bring people together for education, professional development, and personal growth; who inspired others and always provided a sense of optimism and hope for the future for the betterment of this corporation."

LS

## Meet the Editor of The Legal Secretary

The Editor of *The Legal Secretary* is an appointed officer of LSI. The Editor of *The Legal Secretary* is in charge of the compilation, editing, publication and distribution of *The Legal Secretary* magazine each quarter, and is in charge of the Bulletin Contest held annually at LSI's Annual Conference in May.



Barbara Barregar, of Orange County LSA, has taken on the challenge of this position for almost 3 years. There are a lot of moving pieces to make sure the magazine looks professional, is a good resource for educational information for LSI members and legal professionals, and to make it a great marketing tool for LSI. Barbara has stated that it is a lot of hard work but the end product makes all of the hard work so worthwhile.

Prior to being appointed as Editor of *The Legal Secretary*, Barbara has served LSI as the Legal Procedure Chair, Annual Conference Official Registrar and Assistant Registrar, LSS Civil Litigation Section Leader, and LSS Transactional Section Leader. Barbara has been an LSI

member for 30 years (she's a current member of Orange County LSA but was a member of Newport Beach LSA before it dissolved). Barbara has been a legal secretary at Rutan & Tucker, LLP for 34 years (from starting as a file clerk, to being a litigation support clerk, and currently is a legal assistant in the real estate department). She loves to travel, read, and is a huge sports fan (Anaheim Ducks being her favorite team).

She has been a long-standing member of LSI due to the great educational opportunities, being able to network with other legal professionals at the local and state level, enjoys the camaraderie among all of the members, and greatly cherishes the friendships she's acquired throughout the years.

LS

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## 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, 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*

**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*



## WEBINAR OPPORTUNITIES!

Presented by:



**May 8, 2019 12:00 p.m.**

**\$25/\$45**

### **Everyone's Favorite...Table of Contents and Table of Authorities**

No more cutting and pasting from briefs! This one-hour webinar will take you step by step, through the process of creating and generating a table of contents and authorities using Word.

NextGen is an affiliate of Legal Secretaries, Incorporated, an approved provider, and certifies that this activity is approved for 1.0 hours of CCLS credit.

CCLS Certificate Requested: \_\_\_\_

### **Register no later than May 6, 2019 @ 5:00 p.m.**

*No cancellations or refunds are provided after the webinar; however, should a cancellation occur at least 48 hours before the live webinar, LSI will issue a full refund. Should you be unable to attend the live webinar, and you have already paid, you can receive a link to the presentation to watch at a later time.*

ONLINE REGISTRATION AND PAYABLE AVAILABLE AT [WWW.LSI.ORG](http://WWW.LSI.ORG)  
For group registration, please email [training@lsi.org](mailto:training@lsi.org)

<b>May 8, 2019</b>	<b>Member</b>	<b>Non-member</b>
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**PLEASE READ:** The email of the person(s) attending the webinar should be the email used for online registration. The email listed in the registration is the email that will be sent the webinar link.  
**The webinar link will be emailed to registrants 24-48 hours prior to the webinar.**

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AMANDA PETH is member of McManis Faulkner's marketing team. She is responsible for crafting, tracking, and implementing marketing strategies regarding client development, social media, and general public relations. Learn more [www.mcmanislaw.com](http://www.mcmanislaw.com)

# 11 Tips for Building Your Online Brand with LinkedIn

BY: AMANDA PETH – SUBMITTED BY SANTA CLARA COUNTY LPA

It's no secret that social media has transformed the way the world communicates. And LinkedIn specifically has revolutionized the professional branding landscape both for individuals and companies. But if you think LinkedIn is just for job seekers, think again. From keeping you up to date on industry trends, to staying in touch with someone you met at a conference, to sharing news of a big case win, to spreading awareness about a nonprofit you support, LinkedIn has proven to be multi-functional and valuable for all professionals.



With more than a half billion users on LinkedIn, having an active presence on this social media platform is just as important as in-person networking – and it's easier and more efficient. Think of LinkedIn as your digital reputation. What you put on (or don't put on) defines you in the online world. In fact, your LinkedIn profile often appears in the top 3 Google results when someone searches for you online, which is why it is important to keep your profile in tip-top shape.

While the value is clearly there, it can still be overwhelming to think about adding LinkedIn updates between your 3pm court filing and that stack of trial dates to calendar. But just like you wouldn't show up to work in your pajamas, you shouldn't leave your LinkedIn profile looking sloppy, incomplete, or worse, blank. Whether you're just starting or you've had a LinkedIn profile for a few years, but never actually really used it, it's time to put your best foot forward and start building your online brand today. Here are a few pointers to get you started on LinkedIn.

## A Professional Photo is A Must

Steer clear of using casual photos (no selfies, vacation photos, etc.). If you have a firm headshot, use that. If not, don't fret. All you need is a friend, professional clothing, a smartphone/camera, and a smile.

## Create a strong first impression with your Profile Summary

This is one of the first things visitors view. A good way to start is to take an inventory of all that you did last year (review the clients you worked with, the services you provided, your biggest cases/wins (keeping in mind confidentiality), community involvement, articles and blogs, awards, etc.) and then incorporate the noteworthy items in your summary. Remember to use descriptive keywords for searchability and show your personality too. This is also a great place to add photos that speak to your experience, expertise, and community involvement. Don't forget to add your contact information to your profile (surprisingly this is a common thing people forget to do).

## Connections do matter

When building your network, remember that your connections are public to your friends and sometimes friends of friends (barring any specific privacy settings). Only connect with people you know and respect. Start with co-workers, former classmates, friends, and individuals within your nonprofit or trade organizations. From here, LinkedIn will suggest people for you to connect with in "People You May Know" section. Those you already connected with are also great resources. Take a peek at their connections to see if you may know any of the same people.

Always be cautious when using social media and keep in mind potential conflicts of interest. Also, do not feel like you have to accept invitations from everyone. If you receive a connection invite from someone you don't know, I suggest checking them out and even messaging them to determine if they align with your professional goals. Think quality over quantity.

### **Content Content Content**

If you have written blogs or articles or have participated in seminars, include them into the "Publications" section of your LinkedIn profile. This content helps establish you as an expert in your field. Be sure to add hyperlinks to the content if it is live online. The easier you make it, the more likely people will take the time to read it.

### **Yes, I have skills**

Add any relevant skills or certifications that you have acquired. These further strengthen your status as an expert in the legal profession. When you list your skills be sure to change the order of your skills to have the most important skills for your profession on the top.

### **Show off what you do outside the office**

Add the organizations you are involved with to your profile and include some background information about your connection with them. Not only does it provide more insight about you, it also helps spread awareness about the cause or organization you are passionate about.

### **Take time to browse LinkedIn**

Following groups, companies, or influencers that align with your professional interests and goals is a simple way to stay in the loop about industry updates or opportunities. Not sure who or what to follow? Start with the basics – your alma mater, nonprofits you are involved with, trade organizations, and news publications. Taking a peek at who your colleagues, clients, and even competitors are following is also helpful. Be aware: who and what you follow is public knowledge in the "interests" section of your profile.

### **Don't shy away from automatic notifications**

Many people ask how they may turn off the setting that shares any profile changes you make with your network. If you are changing dated information, by all means turn off that setting, but if you are adding something noteworthy (e.g. a promotion, firm change, etc.), automatic notification to your network is the way to go. It politely pings people of your news and keeps you on top of their minds. It is also good to check the box to receive automatic notifications from your connections. This way, you won't miss a chance to congratulate someone on a work anniversary or other news.

### **Alexa, set a weekly reminder to check my LinkedIn**

Download the LinkedIn mobile app and browse while waiting in line at the grocery store or perhaps you prefer scrolling through your feed in the morning while sipping coffee. It's up to you, but either way, it takes less than 5 minutes, so just do it.

### **Keep up with your firm's LinkedIn page**

Follow your firm's LinkedIn page. This is the single easiest way to share news and company updates with your network.

### **Practice the golden rule**

Visit profiles of your colleagues, clients, and friends to see what is new and interact with them. Consider sending them a quick message or sharing the article they wrote. Pro tip: clicking the "See all" in the "Activity" portion of their profiles shows you their posts, likes, and articles for the last 2 years. Scrolling through this feed may give you an idea of how to start a conversation or make a connection. Also, take time to endorse skills or write a recommendation. Your contacts are likely to return the favor.

It's time to create a LinkedIn profile or update your current profile because it does matter! If questions arise, remember to utilize your resources such as your marketing team, technology team, and good ole Google and YouTube. Not sure how to update your profile picture without sending a notification to your 500 connections? Just ask.

**LS**



## LEGAL SECRETARIES, INCORPORATED Officers and Chairmen Workshops

May 17, 2019

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: Mary S. Rocca, CCLS - LSI Past President <b>Location: Ballroom 1C</b>		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's Workshop</u>  Moderators: Jennifer L. Page, CCLS–LSI Interim Treasurer and Executive Advisor <b>Location: Ballroom II</b>	<u>Newcomer's Workshop</u>  Moderators: Shannon Quigley-Santa Clara County LPA President Elena Schneider, CCLS-Santa Clara County LPA Governor <b>Location: Ballroom II</b>	
<u>Governor's Workshop</u>  Moderator: Rod Cardinale Jr.-LSI Executive Secretary <b>Location: Ballroom III</b>	<u>Membership</u>  Moderator: Lynne Prescott, CCLS-LSI Vice President <b>Location: Ballroom III</b>	
<u>Marketing</u>  Moderator: Lynne Prescott, CCLS-LSI Vice President <b>Location: Seminar II</b>	<u>Hosting Your Own Webinar</u>  Moderators: Kim Oreno-LSI Administrator Rene Evans, CCLS-LSS Webinar Section Leader Dawn R. Forgeur, CCLS–LSS Coordinator <b>Location: Seminar II</b>	
<u>Parliamentarian</u>  Moderator: Kristi L. Edwards, CCLS -LSI Parliamentarian <b>Location: Seminar III</b>	<u>Bulletin</u>  Moderator: Barbara Barregar-Editor of The Legal Secretary <b>Location: Seminar III</b>	

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

**May 17 & 18, 2019**

REGISTER BY MAY 10

Section Member - Free | All others - \$15

**REGISTER AT [WWW.LSI.ORG](http://WWW.LSI.ORG)**

**FRI, MAY 17 1:30PM - 3:30PM**

***Law Office Administration***

**Neutral Workplace Investigations**

Jeanine DeBacker, Esq.

McPharlin Sprinkles & Thomas LLP

***Civil Law***

**Litigation & California Wildfires and/or Mudslides**

Kristine Meredith, Esq.

Danko Meredith

**FRI, MAY 17 4:00PM - 6:00PM**

***Criminal and Family Law***

**International Jurisdictional Issues With Regard to  
Custody Litigation**

Gary Dubrovsky, Esq. and Rosie Reith, Esq.

***Specialty Law***

**CEQA: Litigation and the Administrative Record  
for Legal Secretaries and Paralegals**

Cheron McAleece

**SAT, MAY 18 4:00PM - 6:00PM**

***Federal Law***

**Appellate Process**

Marwa Elzankaly, Esq.

McManis Faulkner

***Probate and Estate Planning***

**Charitable Gift and Trust Planning**

Ryan W. Lockhart, Esq.

Brothers Smith LLP

**Legal Specialization Sections Seminars**  
**DOUBLETREE BY HILTON, NEWARK, CA**

The Legal Specialization Sections are a program of Legal Secretaries, Inc., 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, 2019 | ALPINE, CA

## 3rd Quarterly Conference











SCOTTLYNN HUBBARD is a Ninth Circuit appellate lawyer from Chico, California. He has advanced degrees in finance, business administration, and taxation and offshore financial services. His practice extends to commercial negotiations; business transactions; and federal litigation, the latter evidenced by 70 published opinions.

# Recovering Paralegal Fees: the Best Kept Secret in Federal Court

BY SCOTTLYNN J HUBBARD – SUBMITTED BY SOUTHERN BUTTE COUNTY LPA

One of the best kept secrets in federal court is that paralegals stand on equal footing as attorneys when recovering court-awarded fees. The principle was first established in *Missouri v. Jenkins*, when the Supreme Court recognized that a reasonable attorney's fee is one based on the practices of the community in which the court sits. And if the community bills separately for paralegals, then that practice must be considered when awarding fees. In other words, if law firms in your area bill for both lawyers and paralegals, then judges must respect that practice, too. In arriving at this conclusion, the Supreme Court even went so far as to explain how – all else remaining equal – billing separately for paralegals was economically beneficial for all parties and would lead to lower attorney's fees, as paralegals would charge less to handle many of the tasks normally performed by lawyers. Such work could include, for example, factual investigation; locating and interviewing witnesses; assistance with depositions, interrogatories, and document production; compilation of statistical and financial data; checking legal citations; and drafting correspondence. And by encouraging the use of paralegals wherever possible, judges could promote the effective delivery of legal services while, simultaneously, reducing the spiraling cost of litigation. But this opinion was not a blank check for legal professionals.



Paralegals could still only recover fees to the extent they reflected work traditionally performed by an attorney, i.e., tasks which require the application of legal knowledge and the exercise of independent judgment. Purely clerical tasks did not qualify, no matter who performed them; and many a paralegal (not to mention lawyer) has had their fees stricken entirely because they sought reimbursement for non-legal services. For example, no reasonable client would pay a lawyer \$300 an hour to wash their car, no matter how good of a job they did. Yet, clients routinely sought court-ordered fees for non-lawyerly tasks, and then expressed both surprise

and umbrage when the judge refuses to award them. But such a denial is predictable, as the Supreme Court explicitly prohibited reimbursing attorneys for work that a non-lawyer could perform at a much lower rate. That same prohibition applies to paralegals. Now, obviously, washing a car is an absurd example, but the principle applies with equal force to clerical tasks, too. Where problems arise is that clerical task is a fairly loose term and courts frequently disagree over the finer contours of its meaning.

That said, a number of jobs repeatedly appear in orders denying fees, which include:

- Reviewing court-generated notices
- Calendaring, scheduling, and docketing
- Mailing documents to clients
- Forwarding documents to attorneys
- Informing a client that a document has been filed
- Personally-delivering documents
- Bates stamping and other labeling of documents
- Organizing, maintaining and pulling files
- Copying, printing, and scanning documents
- Receiving, downloading, and emailing documents
- Preparing proofs of service and instructions for service

The above tasks have a high probability of being rejected by the judge and should be avoided whenever possible with the following caveat: Nothing lasts forever, especially billing practices. If the practices in your community change, you are well within your right to bring that change to the judge's attention and demand reimbursement for these traditionally non-recoverable services. Again, by way of example, San Francisco law firms have started billing for clerical tasks, e.g., word processing. As a result, district judges have (slowly) allowed firms to recoup that cost from opponents. If you live in a community experiencing just such a change, be prepared to offer evidence showing how firms are now billing for clerical tasks and do not be surprised when you receive a lukewarm reception. Courts are naturally skeptical and it will take more than one application before they consider your request credible.

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## *Dates to Remember in 2019*

- May 6, 2019** Deadline to register for LSI Webinar – “Everyone’s Favorite...Table of Contents and Table of Authorities”
- May 8, 2019** LSI Webinar – “Everyone’s Favorite...Table of Contents and Table of Authorities”
- May 10, 2019** Registration deadline for Legal Specialization Sections Seminars at LSI Annual Conference
- May 16-19, 2019** LSI Annual Conference  
DoubleTree by Hilton, Newark, CA  
Hosted by Alameda County LSA
- May 21, 2019** Deadline to register for LSI Webinar – “Requesting Your Client’s Medical Records”
- May 23, 2019** LSI Webinar – “Requesting Your Client’s Medical Records”
- June 1, 2019** Last day to submit articles for August 2019 issue of The Legal Secretary
- July 7, 2019** Deadline to register for CCLS On-Line Study Group
- July 14, 2019** CCLS On-Line Study Group begins

SAN GABRIEL VALLEY LEGAL SECRETARIES ASSOCIATION

INVITES YOU TO A

**WEEKEND IN PARIS**

AUGUST 16-18, 2019

LSI's 1ST QUARTERLY CONFERENCE

Hilton Los Angeles/North Glendale  
100 W. Glenoaks Blvd., Glendale, California 91202



**CONFERENCE REGISTRATION FORM**

Name (As it will appear on Badge): \_\_\_\_\_

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

City/State/Zip: \_\_\_\_\_

Home No.: \_\_\_\_\_ Cell No.: \_\_\_\_\_ Work No.: \_\_\_\_\_

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

Local Association (Do Not Abbreviate): \_\_\_\_\_ ☐ LSA ☐ LPA

Please Check If Applicable (Include Title): ☐ Governor ☐ CCLS ☐ PLS ☐ Other \_\_\_\_\_

☐ State Officer: \_\_\_\_\_ ☐ State Chairman: \_\_\_\_\_

**SCRIP TICKET** (Includes Registration, Welcome Reception, Banquet and Brunch):

Postmarked on or Before July 15, 2019 \$180.00 \$ \_\_\_\_\_

Postmarked on or After July 16, 2019 \$190.00 \$ \_\_\_\_\_

**INDIVIDUAL TICKETS:**

REGISTRATION on or Before July 15, 2019 \_\_\_\_\_ @ \$25.00 \$ \_\_\_\_\_

REGISTRATION on or After July 16, 2019 \_\_\_\_\_ @ \$35.00 \$ \_\_\_\_\_

WELCOME RECEPTION (Friday) \_\_\_\_\_ @ \$30.00 \$ \_\_\_\_\_

GOVERNORS LUNCHEON (Saturday) \_\_\_\_\_ @ \$37.00 \$ \_\_\_\_\_

PRESIDENTS LUNCHEON (Saturday) \_\_\_\_\_ @ \$37.00 \$ \_\_\_\_\_

OPEN LUNCHEON (Saturday) Choose One: \_\_\_\_\_ @ \$37.00 \$ \_\_\_\_\_

☐ Barbeque Ranch Chicken Salad

☐ Fresh Tuna Salad on Sourdough with side  
of cold pasta

BANQUET (Saturday) Choose One: \_\_\_\_\_ @ \$80.00 \$ \_\_\_\_\_

☐ Pan Seared Breast of Chicken

☐ Boneless Beef Short Ribs

BRUNCH (SUNDAY) \_\_\_\_\_ @ \$45.00 \$ \_\_\_\_\_

**TOTAL AMOUNT PAID:** \_\_\_\_\_ \$ \_\_\_\_\_

**Special Dietary Request** (Including Vegetarian): \_\_\_\_\_

**MAKE CHECKS PAYABLE TO: SGVLSA 2019 CONFERENCE FUND**

**SEND TO:** Linda Lane, CCLS  
c/o San Gabriel Valley Legal Secretaries Association  
P.O. Box 12582, La Crescenta, CA 91224

**FOR INFORMATION CONTACT:**

Co-Conference Chair, Linda Lane, CCLS, email: [llane44@yahoo.com](mailto:llane44@yahoo.com) - 818-434-6600 or

Co-Conference Chair, Betty Thomas, email: [bettythomas317@gmail.com](mailto:bettythomas317@gmail.com) - 323-258-3435

**NO REFUNDS AFTER AUGUST 1, 2019**





## *WEEKEND IN PARIS*



HOSTED BY  
**SAN GABRIEL VALLEY LEGAL SECRETARIES ASSOCIATION**

LSI's 1ST QUARTERLY CONFERENCE

AUGUST 16-18, 2019

HILTON LOS ANGELES NORTH/GLENDALE  
100 W. GLENOAKS BLVD., GLENDALE, CALIFORNIA 91202

### **HOTEL REGISTRATION FORM**

**ACCOMMODATIONS:** (Plus applicable taxes and fees)

1 King Bed - \$175 / 1 Queen Bed - \$175 / 2 Double Beds - \$175

Check-in Time: 3:00 p.m. / Check-out Time: 12:00 noon

**RESERVATIONS:** 818-956-5466      **GROUP CODE:** LSI

Book Online at: [https://www.hilton.com/en/hi/groups/personalized/B/BURHGHF-LSI-20190815/index.jhtml?WT.mc\\_id=POG](https://www.hilton.com/en/hi/groups/personalized/B/BURHGHF-LSI-20190815/index.jhtml?WT.mc_id=POG)

**Deadline to reserve your room is July 25, 2019 - No Room Rate Guarantee After This Date**

**Parking:** \$ 5.00 - (Self-parking with in and out privileges)

\$19.00 - (Valet parking with in and out privileges)

There is no hotel shuttle from either airport.

Directions from Burbank and LAX Airports:

Burbank Airport is 8 miles from hotel: Left onto W. Burbank Blvd to I-5 South toward Los Angeles to Route 134 East toward Glendale/Pasadena. Exit Central/Brand Blvd. Keep right at exit ramp, fork left onto N. Central Ave., right onto W. Glenoaks Blvd. Hotel is on the right. Los Angeles International (LAX) is 25 miles from hotel: Exit LAX via Century Blvd., to 405 North to 101 South to 134 East. Exit Central/Brand Blvd. At light make left onto Central Ave., right onto W. Glenoaks Blvd. Hotel is on the right.

### **FOR INFORMATION CONTACT:**

Co-Conference Chair, Linda Lane, CCLS, email: [l.lane44@yahoo.com](mailto:l.lane44@yahoo.com) - 818-434-6600 or

Co-Conference Chair, Betty Thomas, email: [bettythomas317@gmail.com](mailto:bettythomas317@gmail.com) - 323-258-3435

Visit our website for Conference Information and Updates at [www.sgvlsa.org](http://www.sgvlsa.org)

# CCLS QUIZ: CALIFORNIA LEGAL PROCEDURE

**DIRECTIONS: DETERMINE THE CORRECT ANSWER FOR EACH QUESTION BELOW.**

1. Which of the following are grounds for dissolution?
  - (a) Unsound mind and adultery
  - (b) Incest and bigamy
  - (c) Irreconcilable differences and incurable insanity
  - (d) All of the above
2. What type of deed does not contain any implied or express covenants?
  - (a) Quitclaim Deed
  - (b) Warranty Deed
  - (c) Deed of Trust
  - (d) Grant Deed
3. Because a deposition subpoena for personal appearance has all the information regarding the deposition (deponent, date, time, location), it is not necessary to serve a separate notice of deposition. True/False
4. Which of the following appraises all cash and money accounts and insurance proceeds in an estate?
  - (a) Probate referee
  - (b) Court clerk
  - (c) Probate judge
  - (d) Personal representative
5. In determining child support, welfare assistance should be included in calculating the amount of support to be awarded. True/False
6. Statements of information for domestic stock corporations must be filed every year. True/False
7. Declaring one's principal residence a homestead protects the dwelling from forced sale. True/False
8. The last day to complete discovery in a civil lawsuit is \_\_\_\_ days prior to the initial trial date.
  - (a) 10 days
  - (b) 15 days
  - (c) 30 days
  - (d) 45 days
9. A self-proving will is one which is witnessed under penalty of perjury. True/False
10. Statements of Information for a limited liability company must be filed within 90 days of filing the Articles of Organization and every \_\_\_\_\_ thereafter.
  - (a) Every 6 months
  - (b) Every year
  - (c) Every other year
  - (d) Every 5 years

**CCLS QUIZ ANSWERS ON PAGE 27**



CYNDEE SAUCEDA, CCLS is the Practice Group Manager for the Land Use & Appellate Departments for Meyers Nave and has been with the firm for fifteen years. She is responsible for all the litigation and project related calendaring for both departments. She has over 20 years of experience in supporting attorneys and staff in all aspects of Civil Litigation. She is currently the Governor of Alameda County Legal Secretaries Association and the Legal Specialization Sections Leader for Specialty Law for Legal Secretaries, Incorporated.

# 85th Annual Conference – Education Through the Years

BY CYNDEE SAUCEDA, CCLS – SUBMITTED BY ALAMEDA COUNTY LSA

## We are just days away from our EIGHTY-FIFTH Annual Conference!

Eighty-five years is a more than a lifetime of achievement. Many of you know the history: In 1929, an idea was formed and initiated to gather together a group of legal secretaries in order to learn what was required in the preparation and filing of legal documents. By 1934, this idea blossomed and spread throughout the state of California, and in 1940, Legal Secretaries, Incorporated, (also known as LSI®) was formed as a nonprofit mutual benefit corporation.



We have been Educating California's Legal Secretaries for 85 years. It is pretty impressive to have that kind of staying power. We have seen a lot of change in that time. In laws, in technology and in our career as legal secretaries. In the 1930s the average yearly salary was \$1,368 and the average cost of a new house was \$4,100; today the average yearly salary for a legal secretary is \$52,000 and a new house \$290,000. These are obviously national averages and not California specific, but still, big difference. I know some of you remember typing on carbon paper and even before those IBM Selectrics became popular; today we have computers where just a back space erases all. Magic I tell you.

I am excited to be leading the team for Alameda County Legal Secretaries Association as we prepare to host the 85th Annual Conference at the DoubleTree by Hilton located in Newark, California on May 15-19, 2019.

We are going to journey back to a simpler time. Join us for elementary school recess at our Friday evening reception. Play a game or step out on the patio for hopscotch while snacking on cracker jacks and mini corn dogs, among other great snacks.

As we head "Through The Years," we remember high school Prom so get out those "Prom Dresses" and come to "Diamonds By The Bay" LSI Prom Night. You will have the opportunity to take photos at the Photo Booth and dance the night away to songs you remember from Prom. There will be lots of glitter and glamour so dust off those tiaras and come dance with Alameda County LSA.

Continuing "Through The Years" we come to the conclusion of our school days – Graduation. Celebrate your years of education with your cap and gown and receive your diploma! You should feel proud and be rewarded for your hard work and dedication to LSI!

This event also features a raffle, which includes various gifts such as a Coach wristlet, Michael Kors gold tote bag, Harry Potter, SF Giants, San Jose Sharks, SF 49ers gift baskets just to name a few. In addition we have a jewelry tree, various statutes, purses and more. There should be something there for everyone. Raffle Tickets will be on sale all weekend. They can be purchased at the registration desk upon arrival.

There are so many things to do in the Bay Area so, come a few days early or stay a few days later. Enjoy shopping at NewPark Mall, located within walking distance of our hotel. Wine connoisseurs can visit the Livermore Wine Country, just 12 miles away, to discover and learn about a variety of famous California wines. Experience the excitement and attractions of downtown or watch the San Francisco Giants play, just a half-hour drive from the DoubleTree. Head over to Oakland and visit the Oakland Alameda Coliseum and ORACLE Arena and watch the A's and Golden State Warriors. Take the family for an exhilarating day out to California's Great America Theme Park or visit the Winchester Mystery House - a Victorian mansion with a unique history - just 15 minutes away.

Come for the education and stay for the lifelong friendships!

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KRISTI L. EDWARDS, CCLS has been a legal secretary for over 26 years. She is legal assistant and office manager for Froneberger & Leviloff in San Rafael, an estate law firm specializing in estate planning and probate litigation. She is an honorary member and has held all offices of Marin County LPA, along with many chair positions. She served LSI as Probate Section Leader for 3 years and is now in her third year as LSI's Parliamentarian. She is a member of the Marin County Bar Association in the non-attorney category. She and her husband of 44 years live in Novato and enjoy following the local Pacifics baseball team, the SF Giants, and Golden State Warriors.

# What is the Value of Membership?

BY KRISTI L. EDWARDS, CCLS – SUBMITTED BY MARIN COUNTY LPA

Why do I maintain my membership in my local association and LSI? What do I get for my dues? Is it worth it? I believe it is for the following reasons:

First, I have access to quality education that is affordable. I've always considered myself a student and hope that I will remain curious forever. I loved going to school, and I think that is one reason I am attracted to the legal profession. Becoming an attorney involves lots of education; attorneys value and recognize the need for continuing education, e.g., their mandate for MCLE. This requirement written into their rules of conduct extends to the staff they employ. Although some attorneys fail to recognize this and do not actively promote the education of their staff, the mandate is there.

Has Marin County LPA ("MCLPA") and/or LSI aided my quest for CLE? Yes. In addition to the general education I receive through exposure to members and speakers at my local association meetings, the first thing I found in LSI was the CCLS program. This program offered me the missing link in my legal secretary education. I came to my first job in a law office with no legal education or experience at all. The CCLS program helped fill that gap at a very reasonable cost, while allowing me to participate on my own time, at my own rate.

The next educational opportunity I was afforded were excellent classes at regional seminars, at the LSI conferences through LSS membership, and at local seminars sponsored by MCLPA. I still miss the regionals – the most in-depth classes I have ever attended were at the regionals where we had the time for lengthy sessions, uninterrupted by business meetings and social events. Those are gone, but I have rarely been disappointed in any local MCLPA or LSS seminar I have attended, and the price has always been extremely affordable.

Now that LSI is offering more and more webinars and online classes, the access to this quality education is available to anyone who has an internet connection. The webinars are offered at various times and as LSI increases access, anyone will be able to fit these classes into their schedule at their convenience.

Have I been able to find similar quality programs, specifically geared to California law, at the fees LSI charges anywhere else? No. I see the brochures that come in the



mail and I've heard the experiences of others who have taken online classes not specific to California law. I know the access to legal secretary educational programs is dwindling. I have not yet found a program that will give me the bang for my education buck that LSI does.

Second, I have access to quality reference materials at reduced membership prices. I depend on the Law Office Procedures Manual and the Legal Professionals Handbook every day. I have the Legal Secretary Resource Guide and have given it as a gift to several newbies to the law office. I am amazed at the editorial work accomplished by the volunteers of the PRC in producing these reference books and so proud to be associated with them through LSI. Are there other reference books directed at California legal support staff of this quality out there? Maybe, but I've never found these sources to be lacking and my attorneys have long recognized these books as reliable and have been willing to purchase them for me.

In addition to member-priced references, there are the LSS newsletters and the LSI legal procedures blog – extra sources of current information that come right to my inbox.

Third, is networking within a group of people who work in the same capacity that I do important? Absolutely. I have gained so much from my colleagues over casual dinner conversation at local association meetings. I have developed contacts across the state by attending LSI conferences and meeting vendors, speakers, and colleagues who practice in the same area that I do. Sometimes I learn more from the questions asked by participants in an in-person seminar, than



from the speaker's presentation. My contact with colleagues who practice in different areas is helpful as well, even if only on a personal level.

Is this personal contact replaceable? Can't we just do this online, through email or skype? To some extent, yes. But, personal contact, spending time mingling with people, discussing and deliberating, is irreplaceable to me. The best human communication is only possible in person. One of the biggest dangers I see in the on-line experience we all subscribe to today, is that we become so focused, we don't know what we don't know. When I only read what my media thinks I am interested in and channels to me, what might I be missing? If I pick up a magazine or newspaper and happen to glance at an article that catches my eye, I might just be exposed to something I find interesting, but had no idea about before my eye wandered. Getting together with a group of people from different areas and experiences can have a similar effect.

Fourth, I find there are other intangible benefits to my membership in this 85-year-old organization. The structure of LSI is a framework that allows for personal and professional growth. The support is there if you just look for it. An hour spent perusing Brass Tacks will give anyone – someone who has never ever served in any volunteer capacity – the guidelines to succeeding in any position in LSI. If you simply follow the basic suggestions for each office, each chair, you will have a good chance at success in your position. Each experience of success seems to drive you forward, and you become eager for the next challenge. It has been my pleasure to watch members of my local association grow in their ability to address a group and express their ideas, to organize, follow through, and reap the rewards of working on a successful event. It has been amazing to watch members of LSI begin as chairs and then make the leap to the Executive Committee (EC), at each step becoming more confident, more capable, more professional as they climb that ladder. Where else can I find such opportunities nestled in a strong and positive structure of support?

One of my favorite parts of attending conference is hearing the inspirational speakers. Sometimes it's the local dignitary that welcomes us to their city at the opening of the Saturday business meeting. We often hear wonderful stories of hardships overcome at the Banquet or Sunday Brunch, but every conference we hear from one of our own – a member brave enough to address the assembly and tell their story of inspiration. These are often the things I remember most when I return to my desk after a conference weekend.

Another intangible relates to travel. I wrote an article years ago about the places in California I would have never made the time to visit had it not been for attending a regional or LSI Conference. I've seen the amazing Sundial Bridge at sunset, walked among plopping mud volcanoes destroying a pair of shoes in the process, visited an aviation museum and sat inside a plane like the one my father must have flown to Europe in World War II, enjoyed theme parks and national parks, toured a replica of Independence Hall, and explored the Queen Mary, just to name a few off the top of my head. I've flown all over and driven through many parts of this incredible state, often with some of the good friends I have made, just because I was attending an LSI event.

There is one caveat to all this. It only happened because I said, "Yes, I want to do that." I had to make the effort to get started. I had to say, "OK, I'll try being an officer in my local association." Well, that has worked pretty well; I've learned a lot, my colleagues keep electing me, and I've used that as a springboard to membership in the local bar association and the local legal community. "Alright, I'll attend a conference and find out what happens there." That has been worthwhile; I've visited a lot of cool places, made new friends and contacts all over the state, attended really good classes. "Gosh, can I tackle this CCLS exam?" Yes, I did that! And it earned me a tremendous amount of confidence and the respect of my employer. "Oh, wow, you want me to be an LSS section leader? I don't know, but okay, I'll try." Now, I've become infatuated with the area of law I'm privileged to work in, I found a bunch of new information sources while learning to produce a newsletter, and I'm not afraid to cold-call an attorney and ask them to be a speaker. "Are you serious, Parliamentarian? A member of the EC?" Wow, what a learning opportunity this has been and a privilege to serve LSI alongside the dedicated members of the EC.

I'm sure that there are benefits that other members may say are the reasons they maintain their membership in LSI. The bottom line for me is that I have gained more from my membership in MCLPA and LSI than I have yet to return to these organizations. I hope that LSI can continue to respond to the rapid changes in the legal profession and be relevant to the legal support staff working in California law today and tomorrow, because my membership is important to me. It's worth it.

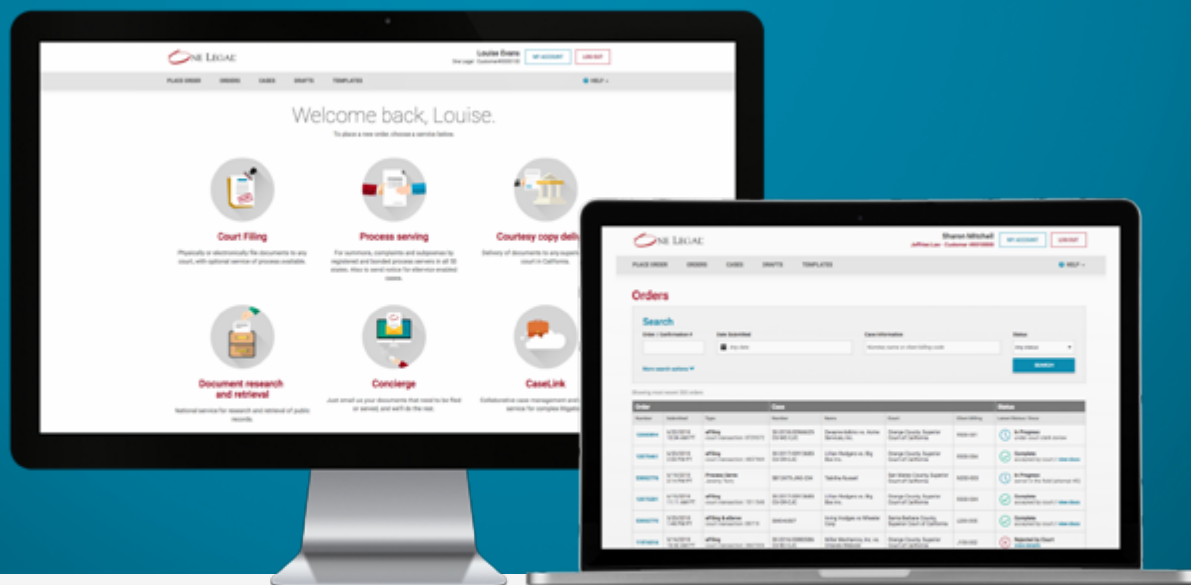
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NextGen is an affiliate of Legal Secretaries, Incorporated, an approved provider, and certifies that this activity has been approved for minimum continuing education credit by the State Bar of California in the amount of 1.0 hours. This activity is approved for 1.0 hours of CCLS credit.

MCLE Certificate Requested: \_\_\_\_CCLS \_\_\_\_ Paralegal \_\_\_\_ Attorney [Bar No. \_\_\_\_].

**Register no later than May 21, 2019 @ 5:00 p.m.**

*No cancellations or refunds are provided after the webinar; however, should a cancellation occur at least 48 hours before the live webinar, LSI will issue a full refund. Should you be unable to attend the live webinar, and you have already paid, you can receive a link to the presentation to watch at a later time.*

ONLINE REGISTRATION AND PAYABLE AVAILABLE AT [WWW.LSI.ORG](http://WWW.LSI.ORG)  
For group registration, please email [training@lsi.org](mailto:training@lsi.org)

<b>May 23, 2019</b>	Member	Non-member
<b>Requesting Your Client's Medical Records</b>	<input type="checkbox"/> \$25	<input type="checkbox"/> \$45

**PLEASE READ:** The email of the person(s) attending the webinar should be the email used for online registration. The email listed in the registration is the email that will be sent the webinar link.  
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LEGAL SECRETARIES, INCORPORATED

## CCLS ON-LINE STUDY GROUP

July 14, 2019 – September 15, 2019



If you are interested in studying for the California Certified Legal Secretary ("CCLS") Exam,\*\* join LSI's CCLS On-Line Study Group. During the classes, all topics covered in the CCLS exam will be reviewed (see *CCLS Information Kit* on LSI website for a description of the sections of the exam).

Lectures (MP4) and materials will be posted no later than 7 pm on Sundays. Students may complete the material at their convenience. Access information will be provided upon enrollment in the classes.

### Individual modules for each section of the CCLS Study Group are available!

If you only need to study for a few sections, you may purchase individual modules for immediate upload at any time during the then-current Study Group class. You may also purchase all sections if you would prefer to study at your own pace.

Reminder – all material is intended for individual use only, and not for local association study groups

Students will be provided with homework and handouts. **Students are responsible for providing their own *Law Office Procedures Manual*, *The Gregg Reference Manual* (11th Ed.), *California Style Manual* (4th Ed.), and *Pocket Guide to Legal Ethics*, NO LATER THAN the start of the classes.** Students are also encouraged to have the CCLS Study Guide.

**\*\*All examinees must meet eligibility guidelines outlined in the CCLS Information Kit on LSI's website.**

### CCLS STUDY GROUP REGISTRATION

(Please type or print clearly)

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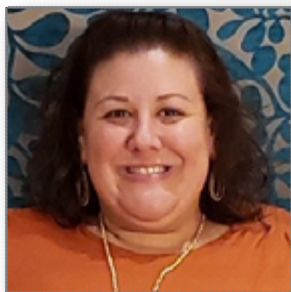
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**DEADLINE TO REGISTER IS JULY 7, 2019.** Send registration to Terrie Quinton, CCLS, LSI CCLS Chair, c/o Duckor Spradling Metzger & Wynne, 101 W. Broadway, Ste. 1700, San Diego, CA 92101 or email [lsiccls@outlook.com](mailto:lsiccls@outlook.com) (with credit card information). You may also pay via PayPal at [www.lsi.org](http://www.lsi.org). **NO REFUNDS AFTER JULY 10, 2019.**

**STRIVE FOR SUCCESS – BE A CCLS!**





BRANDI MACEDO has been a member of Stanislaus County LPA since 2018. She completed the paralegal program at Abrams College and has been working for Michael Loeffler, Esq., a family law attorney, since January 2019.

# My New Career as a Legal Professional

BY BRANDI MACEDO – SUBMITTED BY STANISLAUS COUNTY LPA

I have never been one to settle, so, at age 36, I decided to quit my job and pursue a new career. Terrified didn't even begin to describe how I felt. However, shortly after attending a couple of my paralegal classes, the feeling of excitement quickly took over. Less than a year after making one of the most difficult decisions of my life, I am now working for a fantastic Family Law attorney and absolutely loving my new career in the legal field. Becoming a paralegal has been one of the most rewarding life choices I have ever made.

I had no idea what I was getting into when I decided to join my local chapter of Legal Secretaries Incorporated, the Stanislaus County Legal Professionals Association. This group of amazingly talented women has provided this newbie with endless amounts of guidance, support, comradery, networking opportunities, and adventure.

In November of 2018, I attended my very first Legal Secretaries Incorporated conference, and what an adventure that was! It all started with a van full of 5 adults, 1 teenager, and a baby. No, that is not the title of a movie, that is just how we roll here in Stanislaus County. As we made the 5-hour road trip to Reno, Nevada, I had no idea what shenanigans were waiting for me when I arrived.

I was pleasantly surprised by the massive amount of planning and detail that went into putting on this conference. Getting to meet people in the legal profession from all over California was such a fascinating experience. Everyone was so warm and welcoming. I couldn't believe how everyone seemed to go out of their way to make my first conference a memorable one.

The reception was a great way to network and meet new people, not to mention the food was delicious. During the day I chose to attend as many of the classes as I could. I love that I

was able to mingle with other professionals in my new career, eat great food, and get some continued education credits all at the same time. I even won some prizes during the classes, just by correctly answering some questions. Being able to gamble in my free time was just an added bonus.

If you like freebies as much as I do, then you'll understand why the meet and greet with the vendors was one of my favorite parts of the weekend. I was handed a boodle bag and told that I could fill it with free goodies just by going around to all the booths and talking with the vendors. I mean, one can never have enough pens, legal pads, calculators, post-it notes, etc. Needless to say, I was in heaven.

It wasn't until I was invited to game night that I found out that the ladies from my own local chapter of Legal Secretaries Incorporated were responsible for creating this crazy fun tradition. I was welcomed into the group as if these ladies had known me for years. I had so much fun playing games and chatting with my new friends.

Becoming a member of Legal Secretaries Incorporated has been such a blessing. Having a network of experts at my disposal is invaluable as a newcomer to this profession. I look forward to attending many more conferences and I can't wait to see what the future holds for me and my new career.

LS

FROM QUIZ  
ON PAGE 20

## CCLS QUIZ ANSWER KEY

- |          |          |         |
|----------|----------|---------|
| 1. C     | 5. False | 9. True |
| 2. A     | 6. True  | 10. C   |
| 3. False | 7. False |         |
| 4. D     | 8. C     |         |

## LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

*Note: This list is maintained for use by members of Legal Secretaries, Inc. Agents for insurance and financial providers are available as resources when members inquire about benefits. Please use this as a starting point; ask for information, compare policy coverage and prices. LSI wants its members to find the BEST coverage for each member's individual needs and location. For information, call these representatives directly.*

<p><b>*NEW BENEFIT: LEGALSHIELD/IDSHIELD</b>  Contact: Courtney Coats, Independent Associate  (925) 580-6446; <a href="mailto:coats8@legalshieldassociate.com">coats8@legalshieldassociate.com</a>  LegalShield offers legal, identity theft protection, along with a massive Perks Program where you will have significant savings to over 500 local and national companies.</p>	<p><b>QUESTIONS AND CONCERNS CONTACT:</b>  Lynne Prescott, CCLS, LSI Vice President  LSI Marketing Committee Coordinator  (916) 398-0120  <a href="mailto:slprescott7@gmail.com">slprescott7@gmail.com</a></p>
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<b>PRESIDENTS' PIN*</b> A 1.5" high oval gold-tone pin with blue and white enamel overlay. LSI logo in center and "Legal Secretaries, Incorporated" inscribed on circumference. For local association Presidents.		7.00	
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<b>CCLS PIN</b> A 1/2" high, 10-karat gold filled pin with CCLS logo. For the CCLS		35.00	
<b>MISCELLANEOUS</b>			
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<b>CCLS STUDY GUIDE</b> Sample question and answers to assist in preparing for all sections of the CCLS Exam.		25.00	
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<b>LSI ADMIN DOCUMENTS</b>			
<b>BROCHURES</b> Single-page step brochures promoting LSI and its programs (Also available for pdf download on LSI website, <a href="http://www.lsi.org">www.lsi.org</a> )		N/C	
<b>LSI MEMBERSHIP BROCHURE</b> Extolls the advantages of LSI membership and programs.		N/C	
<b>LSS BROCHURE</b> Lists sections offered and reasons for joining.		N/C	
<b>CCLS BROCHURE</b> Promotes the benefits of taking the CCLS Exam.		N/C	
<b>HISTORY OF LSI</b> A memory of people, places and events since 1929		5.00	
<b>HISTORY/SCRAPBOOK RULES*</b> 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.		5.00	
<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 Handbook and Law Office Procedures Manual flyer, and Code of Ethics. Local associations may insert additional material. For new local association members only.		N/C	
<b>LEGAL PROFESSIONALS HANDBOOK/LAW OFFICE PROCEDURES MANUAL FLYERS</b>			
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<b>LOPM FLYER</b> 8.5x11" advertisement of the LOPM. Includes listing of contents and order form		N/C	
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<b>AVAILABLE FOR FREE DOWNLOAD (WWW.LSI.ORG)</b>			
<b>LSI BYLAWS AND STANDING RULES*</b> As adopted by the LSI Governors.		N/C	
<b>Brass Tacks*</b> A guide instructing local officers and chairmen on how to perform their respective duties. Contains checklists, calendars, and forms. (No charge for pdf download @ <a href="http://www.lsi.org">www.lsi.org</a> )		N/C	
<b>BROCHURES</b> Single-page step brochures promoting LSI and its programs (Also available for pdf download on LSI website, <a href="http://www.lsi.org">www.lsi.org</a> )		N/C	
<b>LSI MEMBERSHIP BROCHURE</b> Extolls the advantages of LSI membership and programs.		N/C	
<b>LSS BROCHURE</b> Lists sections offered and reasons for joining.		N/C	
<b>CCLS BROCHURE</b> Promotes the benefits of taking the CCLS Exam.		N/C	
<b>GUIDELINES FOR HOSTING LSI CONFERENCES*</b> An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI conference		N/C	
<b>GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM</b> A guide, with sample forms, to assist with the planning and execution of a successful legal educational program (No charge for pdf download @ <a href="http://www.lsi.org">www.lsi.org</a> )		N/C	
<b>LEGAL PROFESSIONALS HANDBOOK/LAW OFFICE PROCEDURES MANUAL FLYERS</b>		N/C	
<b>LPH FLYER</b> An 8.5x11" advertisement of the LPH. Includes listing of contents and order form		N/C	
<b>LOPM FLYER</b> An 8.5x11" advertisement of the LOPM. Includes listing of contents and order form		N/C	
<b>LPH/LOPM FLYER</b> An 8.5x11" advertisement for both LPH and LOPM. Includes listing of contents and order form		N/C	
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Rev. March 2019





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# Lawyers and Cybersecurity in 2019: Trends and Tips

BY: NICOLE BLACK - SUBMITTED BY ORANGE COUNTY LSA

In 2019, cybersecurity is of paramount importance. This is because lawyers have an ethical obligation to ensure client confidentiality, whether that information is stored in paper files or online. As more lawyers than ever move to cloud computing, maintaining secure online files is a necessity for law firms, both big and small.



No doubt your law firm has security measures in place to protect your firm’s digital data. But are the steps your firm is taking sufficient? How does your firm compare to other firms of equal size? If you’re unsure, never fear. You’ll find the answers in the ABA’s latest Legal Technology Survey Report, which provides all sorts of data on how lawyers and law firms are using technology in 2019. And, of course, cybersecurity is included in its results.

So without further ado, let’s take a look at the data from this year’s report on cybersecurity trends and how lawyers are protecting their firm’s data.

## Securing law firm hardware

Oftentimes for lawyers, the hardware that they carry with them can be the weakest link. That’s why it’s so important to password protect all of your devices, whether it’s your laptop, smartphone, or tablet. The good news is that in 2019, most lawyers understand this.

For starters, lawyers are using passwords to protect their laptops. According to the Report, more than 90% of lawyers surveyed reported that they password-protected their laptops. The large firm lawyers led the way with 100% of respondents from firms of 100 or more attorneys doing so. Next were of solo firms at 99%, followed by 98% of lawyers from firms with 2-9 attorneys, and 94% of lawyers from firms with 10-49 attorneys.

Even more lawyers report using password protection for their smartphones, with 92% of lawyers doing so. The lawyers most likely to password-protect their smartphones

were lawyers from firms of 10-49 (97%). Next were 95% of lawyers from firms of 2-9, 95% of lawyers from firms with 100 or more attorneys, and 87% of solos.

The bottom line: if you’re not already password-protecting your devices, the time is now. Make sure to start today, since it’s your first line of defense when it comes to protecting your firm’s confidential client data.

## The move from premise-based software to secure computing in the cloud

Did you know that one of the primary reasons lawyers are moving from premise-based software to using law practice management software in the cloud to run their law firms is security? In fact, according to the Report, 31% of lawyers surveyed reported that primary reason that their firms made the move from premise-based software to cloud-based software in 2018 was because it provided better security than they were able to provide in-office.

So it’s no surprise then that more lawyers than ever are planning to make the move to the cloud in 2019. According to the Report, in 2019, a good number of law firms are planning to replace premise-based legal software with a cloud-based alternative. 10% of lawyers overall indicated that was the case (notably 43% weren’t sure what their firm’s plans were). Of the firms that planned to make this move, small law firms with 2-9 lawyers led the way at 15%. Next up were law firms with 10-49 lawyers at 14%, followed by firms with 50-99 lawyers at 13%, then firms with 100-499 lawyers at 12%, and coming in last was solos at 6%.

And, notably, 55% of lawyers surveyed have already used cloud-computing software for law-related tasks over the past year, up from 38% in 2016. The fact that 75% of lawyers surveyed reported that they'd downloaded the Dropbox app in the past year is a further indication that even more lawyers are using cloud computing, but are simply unaware that they're doing so. Either way, more lawyers than ever are using cloud computing tools, and security concerns are an important impetus behind this rapidly occurring transition to the cloud.

### Cybersecurity Tips

Of course, password protecting their devices and moving to the cloud are just some of the steps lawyers are taking to secure their firm's data. Another popular security measure that is on the rise in 2019 is using a password manager such as Lastpass to store passwords, with 24% of lawyers doing

so. Lawyers from firms with 100-499 lawyers were the most likely to use password managers at 30%, followed by solos at 27%. Next were lawyers from firms of 500+ attorneys at 26%, and lawyers from small firms (2-9 attorneys) at 23%.

So if you're not already using a password manager, now's the time to start. In addition, there are many other simple security measures that you can start implementing today that you might not even be aware of, such as using two factor authentication. To learn about two-factor authentication, along with lots of other cybersecurity tips, including advice on why password managers are so important, check out this [blog post](#).

*This article is reprinted with expressed permission from Nicole Black.*

LS

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The following individuals are to be recognized and commended for passing the CCLS exam during the 2018-2019 year:

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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!



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