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BY LYNNE PRESCOTT, CCLS  
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Dedicated to LSI Past President, Joan M. Moore, PLS, CCLS

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# Moving Onward and Upward in Unity

BY MARY J. BEAUDROW, CCLS



## MARY J. BEAUDROW, CCLS

is President of Legal Secretaries, Incorporated and a member of Mt. Diablo Legal Professionals Association. Mary has worked in the legal field since 1977, and has worked for the law firm of Morrison & Foerster LLP since 2002, where she is currently a Senior Docket Coordinator. Mary is a former member and Past President of San Francisco Legal Professionals Association.

Stockton-San Joaquin Legal Professionals Association did a fabulous job of hosting LSI's August 2015 Quarterly Conference at the Hilton in Stockton with the theme, "A Visit to the Emerald Isle." I believe members had the feeling of being in Ireland, especially with Saturday night's entertainment of the Irish band, "The Mighty Murphys."

The Board of Governors meeting began with our welcome speaker, J. Mark Myles, Esq. the San Joaquin County Counsel. Mr. Myles spoke on the topic of professionalism and how it applies to service. He pointed out to the assembly that we were showing our professionalism to our industry by giving up our weekend to attend the conference, so we would be able to provide better service to our employers. I in turn acknowledged Mr. Myles' professionalism in giving up his Saturday morning with his family to speak to us. Mr. Myles provided a great way to start the day.

Between the six seminars presented over the weekend by the Legal Specialization Sections, the CEC seminar presented Friday night, and the CCLS Workshop presented on Saturday morning, attendees had ample opportunity to obtain continuing education. The main reason for LSI's existence is to provide continuing education to our members and non-members.

Vice President Jennifer L. Page, CCLS, informed the Governors of the following changes that have been made to the 2015-2016 Chapter Achievement contest:

1. Advertising: Member submitting potential advertiser to the LSI Advertising Chair. (Per member, per advertiser. No duplicates. Must include contact information for advertiser.) 25 points
2. Legal Specialization Sections: Member attending Webinar sponsored by the Sections. (Per member, per webinar.) 50 points per member, per webinar
3. LSI Chairmen: Member accepts appointment to serve LSI as an appointed officer or chairman. 100 points
4. Reporting: Officers and Chairmen reporting to LSI counterparts (Per report, each quarter.) Reports must be filled out. 50 points

The first President's luncheon of the new fiscal year started with a demonstration from LSI's Social Media Chair Rod Cardinale Jr. on how to sign up on the Presidents' blog which is set up on LinkedIn. This page was set up last year for the Presidents to use, but I received many comments that people were not sure how to use it. I am hoping that after this demonstration that the Presidents will utilize this tool as a way to communicate with each other between conferences.

Tori Verber Salazar, District Attorney for San Joaquin County, was the Sunday morning speaker. Ms. Salazar is the first woman District Attorney for San Joaquin County. She shared with us her inspirational story. She grew up on the wrong side of the tracks in Stockton, and she didn't go to any Ivy League schools. It took her eight times to pass the California bar exam, and she said that failing multiple times and then finally passing the exam proved that she could pick herself up and go on to achieve her goals.

In continuing with the Local Association Promotion Program, on Sunday morning the following five associations were selected to receive a free scrip ticket for the November 2015 Quarterly Conference: Beverly Hills/Century City LSA; Imperial County LPA; Long Beach LPA; San Fernando Valley LSA; and Stanislaus County LPA. Governors have told me that this is a great program and appreciate that LSI is giving back in this way.

There were several first time attendees at the August 2015 Quarterly Conference, which made me realize that many of us take for granted what happens at the Board of Governors meeting, but for a newbie it can be an overwhelming experience. The main focus of the Board of Governors meeting is to conduct the business of the corporation – Legal Secretaries, Incorporated. We are a non-profit mutual benefit corporation, and must comply with the laws to maintain such a corporation. In order to comply with California laws, we must conduct the business of the corporation and keep proper records. The status of the corporation's financials and any action taken must be addressed and brought before the Board of Governors to ensure the Executive Committee is overseeing the finances and programs of LSI responsibly.

The Executive Committee has the power to act on behalf of the corporation at the direction of the Board of Governors. The responsibilities of the Executive Committee are set out on behalf of the corporation at the direction of the Board of Governors. Committee are set out in our Bylaws, specifically, Article VIII, Sections 1-6, and the specific powers of the Executive Committee are set out in Article XI of the Bylaws. As a member of LSI, it is important to become familiar with the Bylaws and Standing Rules of LSI, so as to understand how and why the corporation operates the way it does.

This is why many times you may hear one of the members of the Executive Committee telling the Board of Governors that if you are not happy with how the corporation



is being run and/or, you have a suggestion to make the corporation run better then it is up to you to say something. The Executive Committee merely follows through with the decisions made by the governors, and issues that are developed and discussed at the Board of Governors meeting. The Governors are the only ones with voting rights at the quarterly conferences, and delegates have voting rights during the general sessions at the annual conference. However, any member may ask questions at the business meeting, express their opinion, make a motion, second a motion, or amend a motion.

Make a change in your life, step outside of your comfort zone. Invite someone new to attend an LSI conference with you. Introduce them to the Executive Committee and the members of LSI. Help them experience all that LSI offers. But most importantly, make them feel welcome. Help them realize the advantages of being a member of Legal Secretaries, Incorporated.

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# CCLS QUIZ:

## CCLS QUIZ: REASONING & ETHICS

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

1. An attorney is legally responsible for the work product of all members of his staff.
2. Fee agreements are required for all representations, and must be in writing.
3. Attorneys may collect contingent fees in all types of cases and representations.
4. Staff in a law office are held to the same standards of confidentiality as attorneys.
5. An attorney has no duty to turn over a client's files until all fees are paid in full.
6. It is illegal for a notary to use "notario publico" when advertising his or her services.
7. Attorneys may never break the attorney-client privilege.
8. Setting legal fees is considered the "practice of law."
9. A notary may never leave their journal in the care of another notary.
10. If a notary personally knows the signer, they may obtain the signer's signature and ID for their journal within 24 hours after the notarial act is completed.

SEE ANSWER KEY ON PAGE 27



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# LSI First Quarterly Conference





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SHAYLENE CORTEZ, CCLS, is a legal assistant at Thompson & Colegate, and teaches the Legal Administrative Professional certificate program at Riverside Community College. She is president of Riverside LPA, and currently serves on LSI's Continuing Education Council. She is a professional geek, adrenaline junkie, loves technology and the legal field.

# LSI Superheros

BY SHAYLENE CORTEZ, CCLS, LSI 2ND QUARTERLY CONFERENCE CHAIR

It's a bird, it's a plane - no it's legal professionals in Riverside! The Justice Conference League of the Riverside Legal Professionals Association invite all of you to Riverside November 13-15, 2015. We will be staying at the beautiful Riverside Marriott at the Convention Center this year where room rates are \$109 for a single/double, and parking is at a discounted rate of \$8 per day (despite what the website says). All rooms have free Wi-Fi and there is a Starbucks across the street ready to satisfy your needs.



The Marriott is at the east end of our Main Street pedestrian mall which hosts many restaurants, shops, and fun places like the Dragon Marsh. In a five block radius, there are lots of places within walking distance. Heroes Brewery, Simple Simons, and the Salted Pig are popular places for those of us who work in downtown Riverside. Then for dessert, it's Casey's Cupcakes, winner of the Food Network's Cupcake Wars. You can also walk one block to the Mission Inn and tour our city landmark. A five minute walk farther is our downtown Justice Center where our Hall of Justice, Family Law Court, Bankruptcy Court, Federal Court and Court of Appeal are all within a few blocks of each other. However, in the center is our pride and joy - the Historic Riverside Courthouse. Built in the early 1900s, this beauty is worth visiting and is the pride of our legal community.

For those of you looking for a beautiful hike, there is Mt. Rubidoux. A popular day spot for area residents, the views from the top of this 2-mile trail are breathtaking. The Riverside Farmers Market near the hotel will be lively on Saturday from 8 a.m. to 1 p.m. for cheese, bread, flowers and specialty items.

Fly into Ontario International Airport which is only a 20-minute drive to Riverside. Be sure to stop at Ontario Mills on the way for the most awesome shopping experience ever as it is the largest outlet center in California. While you could spend all day there, hurry to Riverside as we have a fun weekend of events planned for you.

While we keep the kryptonite in a safe place, our conference events will be held at the Riverside Convention Center connected to the Marriott. As you enter the foyer, you will be greeted by our registration avengers. You can

then purchase your drawing tickets for awesome prizes, and visit our exhibitors who love and support us. Thanks to the powers of the CEC, there will be a free seminar for registered attendees at 5:15 Friday afternoon. You can then get your superhero powers warmed up at the Welcome Reception in the foyer where you are encouraged to dress up as your favorite superhero or wear your cape as you are greeted by our LSI officers and chairmen.

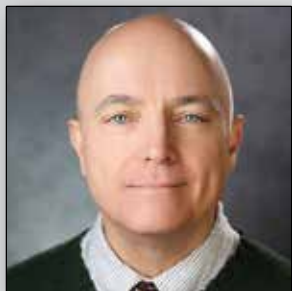
Be sure to have your picture taken at our Justice League photo booth which will be operated by Deadpool himself. You can then dash over to our LSS seminars and sharpen your Spidey senses with education while we keep Lex Luther at bay.

On Saturday, up, up and away, as you will have another opportunity to visit our exhibitors and participate in our Board of Governors meeting before soaring off to more LSS seminars. Join us at one of the Justice League luncheons for more education on LSI's mission to save the world. In the afternoon, the LSS will be having more awesome educational opportunities as, we all know, with great power comes great responsibility. Then it's off to Gotham City for our banquet where a Batman caper is sure to arise and will require the keen problem-solving minds of all to bring evil to justice. After a night of solving crimes, you will be ready for a Marvel-ous brunch Sunday morning as we finish up LSI business.

So "Wonder Twin Powers activate," and join us for a weekend that will certainly be adventurous!

Govern yourselves with love, kindness and service to others - Wonder Woman

LS



CURT HARRINGTON is a high-tech patent attorney and a California Board of Legal Specialization Certified Tax Specialist. In addition to his J.D., Curt holds an LL.M. - Tax from the University of San Diego and master's degrees in chemical and electrical engineering and business. He has prepared and prosecuted hundreds of patents, and has published and spoken widely on Patent, Trademark, Licensing, Intellectual Property Taxation, and Business Start-up. Curt is currently chair of the California Board of Legal Specialization, a unit of California State government that oversees California's Legal Specialization Program. Harrington & Harrington is a tax and patent law firm that helps fortify a client's personal tax position, technology, & business success. [www.PATENTAX.com](http://www.PATENTAX.com) includes many helpful articles and FAQs.

# Attention Trade Shows: Give My Start-Ups a Break!

BY CURT HARRINGTON, ESQ., LONG BEACH LPA

This career has continued to move toward greater ability to help start-ups and with increasing measures of in-depth knowledge. The core of the beginning was rooted in chemistry, and then in chemical engineering as a wholly different and more intense mathematical pursuit. Then a study of business and then law culminating in registration before the patent & trademark office. Unlike many who would have stopped their career at that point, I continued to move through electrical engineering and then tax. The synergies and crossovers between these areas are subtle but important.

Being able to exemplify the advantages in business, chemical and electrical aspects of every invention helps me to at least think about, identify, and put into detail many more aspects and advantages of each invention as it is described in its patent application. An application for utility patent is, after all, a sales document (in addition to being a technical document). The sale is made to the examiner and pays off in terms of greater claim allowability if the selling process is successful. Each examiner is different, but they all respond better to a good presentation of the inventor's path to success.

However, the patent is just part of the process of making money from the invention, and it may not be the most important part. The patent prosecution activities typically occur before filing and then just before one year after filing as you check with the entrepreneur to see if foreign filings make sense. Examination of a utility patent by the patent & trademark office typically may not occur for 2-3 years after filing.

Further, the entrepreneur may need a lot of guidance early as licensing can occur from a period before filing (as a trade secret). Licensing in a manner that either paralyzes future possibilities, or destroys advantageous tax benefits can amount to giving away up to about 18% of the post-tax cash flow from the invention from tax loss alone. Inventors have "instant capital gains" rights provided that the licensing of the invention enables it to turn what might be ordinary income into capital gains. A checklist of factors to consider for all of the above may or may not include:

1. Prepare an advance plan for an advertising roll-out of the product:
  - a) No-cost article pre-positioning plan in industry magazines and blogs.
  - b) Preparation of videos, drawings, & photographs to "teach" the product.
  - c) Web sites, catalog mock-ups, & product positioning preparation.
2. Manufacturing Options that may include:
  - a) Options for timing of domestic self-production (permanent/temporary).
  - b) Options for timing of contract production.
  - c) Options for foreign production, shipping and customs duties.
  - d) Identify foreign markets and supply chains.
3. Decisions to address the clearance of the manufacturing of the product:
  - a) Defensive Patent Insurance for IP-type production liability.
  - b) Defensive Product Liability insurance for harm to others.
  - c) Clearance Search and/or industry investigation for the product.
  - d) State, County & Local Ordinances Prohibition & Liability.



4. Decisions to address nature and extent of any monopoly for the product.
  - a) Offensive Patent Insurance for control of competitors.
  - b) Add-on design patent protection of commercial appearance.
  - c) Trademark protection for a non-descriptive, non-dictionary name.
  - d) Search to insure that materials do not infringe others' trademarks.
5. Prepare operating plan for target & variation of price to optimize markets:
  - a) Construct direct, representative sales, & vertical chain sales profiles.
  - b) Construct models for overseas sales and match with production sites.
  - c) Formulate the manner & limitations of doing business overseas.
6. Tax and Duty considerations, including:
  - a) After-tax income from outright sale of a business line.
  - b) After-tax income and enhanced deductibility from further invention.
  - c) Advantages of a series of joint ventures for inversion tax savings.
  - d) Location and tax advantage of further country-specific research.
  - e) Insulation from state sales & income tax liability.
7. Personal Wealth Planning providing for safe storage of profits:
  - a) The use of spend thrift trusts to insulate against creditors.
  - b) Examination of personal liability based upon state of residency.
  - c) Examination of personal liability based upon state of production.
  - d) Tax minimization based upon residency & production/sales activities.
  - e) Diversification of organizational structure for survival.
8. Licensing Considerations, with and without self-production:
  - a) Separation of patents for segregation of ordinary v. capital gains.
  - b) Examination of personal liability based upon state of residency.
  - c) Examination of personal liability based upon state of production.
  - d) Tax minimization based upon residency & production/sales activities.
  - e) Location and tax advantage of further country-specific research.
9. Periodic re-evaluation of operations:
  - a) Evaluate expansion into new markets if circumstances warrant.
  - b) Consider incentivizing current licensees to expand.
  - c) Consider "carrot" and "stick" licensing provisions.
  - d) Continue improving the product & learn technology advances.

The more you think about these issues, the higher your chances for an improved outcome.

LS

START



ANA FATIMA COSTA, RPR, CSR is a consultant, author, coach and speaker. After a successful 35-year career in the court reporting field, Ana launched her firm AFC Consulting Services in August 2015. She provides court reporters for mock deposition and mock trial events in law schools, law firms, courthouses and private venues throughout the greater Bay Area. The court reporters' presence ensuring the integrity of the record and capturing the spoken words is a powerful reminder that participants need to be more mindful of what they say, and how they say it. Afterward a rough draft or final transcript is provided. As a certified coach and trainer, Ana uses powerful scientifically proven processes that assist legal professionals in achieving greater ease, resilience and understanding in any circumstance. Contact Ana at [afccoaching@gmail.com](mailto:afccoaching@gmail.com).

# The Court Reporter's Dilemma: Interrupt or Drop

BY ANA FATIMA COSTA, RPR, CSR

No one likes to be interrupted, least of all the litigator who is hot on the trail of a crucial answer from a witness. Words are flying like bullets. Suddenly, a voice asks him to repeat the question. He glances at the person sitting nearby, fingers hovering over her machine, waiting. She interrupts several times over the course of the day. He grows increasingly frustrated.

**The following mock Q&A addresses what court reporters confront every day.**

Q. My court reporter is great, but when she was on vacation, her replacement kept interrupting while I was questioning a key witness. I had my secretary advise the reporting firm not to send him back.

A. Court reporters are required by law to be impartial. There is no such thing as "your" reporter. The reporter you prefer may have more experience or the ability to write faster. That doesn't mean other reporters are incompetent.

Q. Well, aren't reporters supposed to be seen and not heard?

A. It sounds like you have an expectation that reporters shouldn't interrupt when participants speak at the same time, too fast, or mumble. Imagine adding heavy accents or terms such as *Lymphangioliomyomatosis* to the mix.

No reporter *wants* to break the flow and momentarily stop the proceedings, especially during an intense volley of Q & A and/or colloquy. Yet as officers of the court and guardians of the record, they have a legal and ethical duty to prepare a full, impartial and verbatim transcript of the proceedings.

Less assertive reporters feel intimidated about speaking up. Isn't it better that they interrupt rather than drop words and produce an inaccurate transcript peppered with "inaudible" parentheticals?

Q. When you put it like that, of course! What kind of training do they get, anyway?

A. Reporters invest an average of five years in school to develop the high level of skill required to pass the strin-

gent California CSR licensing exam. Courses include English; legal and medical terminology; professional practices; CCCP and B&P codes; and thousands of hours of hands-on machine training. Afterward, they take continuing education courses to keep abreast of new laws, services and technology.

Q. I had no idea. Is there anything else I should know?

A. Yes. These three steps will minimize interruptions:

1. Send the following to the reporter at least 24 hours in advance: The Notice of Deposition and service list, a case-specific terminology list, and a previous transcript. These are especially important when reporters provide realtime.
2. Take a breath before speaking. Speak clearly and ask everyone to do the same. By the way, if reporters can't hear or understand you, neither will a judge or jury.
3. Slow down when reading on the record, especially numbers, acronyms and unusual names or terms. Give the reporter a copy of the quoted material.

Reporters work hard to make a verbatim record and satisfy clients, and even the most experienced realtime reporters need to interrupt under certain circumstances. Frustration is temporary, but transcripts are permanent. Viewing interruptions as confirmation that reporters are doing their job will result in a win-win experience where everyone's needs are met – including your clients'.

This article was originally published in the August 2015 issue of The BASF Bulletin, a publication of The Bar Association of San Francisco:

<http://blog.sfbare.org/2015/07/28/the-court-reporters-dilemma-interrupt-or-drop>.

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Deputy City Attorney – City of Riverside

## SEXUAL HARASSMENT LAW IN CALIFORNIA

What You Should Know!

**FRIDAY, November 13, 2015\***

5:15 p.m. to 6:15 p.m.

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## **WORKSHOP REGISTRATION FORM**

### **“ABILITY TO COMMUNICATE EFFECTIVELY – WORD USAGE”**

Second Quarterly Conference, November 13-15, 2015

Marriott Hotel, Riverside, CA

Saturday, November 14, 2015, 7:30 a.m. – 8:30 a.m.

Speaker: Terrie Quinton, CCLS

Cost: \$5.00 for LSI members/\$10.00 for non-LSI members

Who/whom has trouble sometimes/some times deciding on the correct word to use in a sentence? Not choosing the correct word can have an adverse/averse affect/effect on your CCLS exam results. One of the perquisites/prerequisites of attending this workshop will be insuring/ensuring/assuring that you will make the right choice!

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ROBERT B. JACOBS practices Real Estate, Business, Bankruptcy and Foreclosure Law in the Bay Area. Mr. Jacobs can be contacted at Bob7@RBJLaw.com. The foregoing article is not a complete discussion of the subject addressed, and should not be relied on. Readers with specific questions or issues should consult an attorney.

# Rose Bowl A Tradition

BY ROBERT B. JACOBS, ESQ., LIVERMORE-AMADOR VALLEY LPA

On any given New Years Day, perhaps the most valuable piece of real estate in the entire nation is the football stadium where the Rose Bowl game is played in Pasadena, California. Without a doubt, the Rose Bowl is the site of one of the most well known college football games each year.



Perhaps less well-known is the fact that the Stadium itself is listed as a National Historic Landmark. The National Historic Landmark Database is maintained by the National Park Service. According to a National Park Service National Historic Landmarks update in 2004, National Historic Landmarks are designed to provide “reflection upon how we Americans came to be what we are today.” (For more information about National Historic Landmarks, point your browser to <http://www.nps.gov/history/nhl/>.)

According to the web site maintained by the National Park Service, the Historic significance of the Rose Bowl stadium is described as follows: “Since 1922, this has been the site of the earliest and most-renowned post-season college football “bowl” games. Held every New Years Day since 1916, the Rose Bowl also commemorates the civic work of the Pasadena Tournament of Roses Association, the sponsor of the annual flower festival, parade, and bowl game. Additionally, this was one of the venues of the 1932 and 1984 Olympics.”

Following is an excerpt from the official Rose Bowl web site at [www.RoseBowl.com](http://www.RoseBowl.com): “This uniquely American event began as a promotional effort by Pasadena’s distinguished Valley Hunt Club. In the winter of 1890, the club members brainstormed ways to promote the “Mediterranean of the West.” They invited their former East Coast neighbors to a mid-winter holiday, where they could watch games such as chariot races, jousting, foot races, polo and tug-of-war under the warm California sun. The abundance of fresh flowers, even in the midst of winter, prompted the club to add another showcase for Pasadena’s charm: a parade would precede the competition, where entrants would decorate their carriages with hundreds of blooms. The Tournament of Roses was born.”

The popularity of the annual college football bowl game increased over the years. As a result, there came a time

when the game sold out, and some of the hopeful observers were disappointed. One of these situations ended up in a California legal case. At one point in time, the University of California at Los Angeles was selected to represent the Pacific Coast Conference in the annual Rose Bowl game. Radio and newspaper advertisements were made which announced that there would be a public sale of 7500 admission tickets to be conducted at the Rose Bowl stadium. Several hopeful observers came to the box office, and while waiting in line were given numbered “identification stubs,” which were to provide them with the opportunity to purchase two admission tickets to the game. A total of 3,350 “identification stubs” were distributed, but after only 1,500 tickets were sold, the box office closed and announced that all of the available tickets had been sold. The result was that most of the persons holding the “identification stubs” were never able to purchase tickets to the game.

Four of those persons who stood in line and received “identification stubs” filed suit for \$100 in damages. They each claimed that they had been “wrongfully refused” admission to the Rose Bowl game. They filed the suit as a “class action” on behalf of all of those who had received “identification stubs” and stood in line but had been refused admission to the game.

The Court held that under the specific facts of this case, the complaint amounted to nothing more than an “invitation to such persons as may be interested to join with them in this action seeking relief.” The Court did not allow the lawsuit to proceed as a class action. The case is reported as *Weaver v. Tournament of Roses Association* (1948) 32 Cal. 2d 833.

The scramble for Rose Bowl tickets has been around for a long time. The year when this case was decided? 1948 - just three years after the end of World War II.

The moral of the story? Get your tickets early.

LS





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\_\_\_\_\_



CHERYL L. KENT, PLS, CCLS, is currently a member of Mt. Diablo LPA, having transferred from Livermore-Amador Valley LPA in 2014 where she had been a member since 1981. She has been with her current employer, Gagen, McCoy, McMahon, Koss, Markowitz & Raines in Danville since 1982 working in the area of criminal defense.

# I Have Earned the Title of “LEGAL SECRETARY”

BY CHERYL L. KENT, PLS, CCLS, MT. DIABLO LPA

No, I am not “just a secretary,” I am a Legal Secretary. I have earned the title. Growing up in the 60s and 70s when the role of women was transitioning from being stay at home mothers to having a real presence in the business world, I was always told I could be whatever I wanted to be when I grew up. My grandfather wanted me to be a veterinarian. I had other ideas – when I grew up, I would be a ballerina/school teacher/stewardess (the term “flight attendant” came later). I can’t dance, so my number one dream job was not going to happen. I knew I liked learning more than teaching; and most flight attendants had a fairly short career at that time.

I always loved to learn and I had the grades to prove it. By my senior year in high school, I still didn’t know what career path to take. I decided it best to save some money and enroll in a two year junior college and then transfer when I figured out what I wanted to do. The best decision I ever made was to visit the career counselor. At the time, the two highest paying and most in demand jobs dominated by women were Dental Hygienist and Legal Secretary. That’s it, I thought, I’ll be a dental hygienist. As fate would have it, there was a wait list for the dental hygienist program.

My local junior college offered a two year Associate of Arts Degree in Legal Secretary so I enrolled. The program had more required courses and fewer electives than any other program they offered. To complete the required classes within two years, summer school was necessary. The program was very comprehensive. Looking back now, it’s hard to believe that we actually had a class relating to filing systems, real estate and word processing. How times have changed. When I graduated, I felt prepared to start work as a legal secretary. Having to complete an internship was invaluable.

I spent my internship working for two attorneys in downtown Oakland who were practicing personal injury, bankruptcy, and immigration law. They assumed I knew what I was doing, and I actually did! Them making me part

of their team gave me a confidence that has served me well to this day. After my internship, I took a couple of short term assignments with attorneys practicing in a variety of legal specialties and soon learned what areas of law I enjoyed and which I didn’t. My first full-time permanent job was with a general practitioner. He had a paralegal, who became my mentor and gave me the best advice ever: join a local legal secretaries association, and I did. This was back in 1981 and the association I joined was Livermore-Amador Valley Legal Secretaries Association. The paralegal left and I was preparing wills, and family law and civil documents on my own. It was definitely a trial by fire, but I learned quickly and if I had a question, I could call one of my fellow LAVLSA (now LAVLPA) members.

I wanted to learn everything I could and be the best legal secretary possible, so I joined the PLS (Professional Legal Secretary) study group and studied for months. The PLS program was administered nationally by NALS (National Association of Legal Secretaries). It was a two day, seven section exam given twice a year. To this day, passing the exam is the accomplishment I am most proud of. When LSI and NALS parted ways, LSI created the CCLS program and those of us who were PLS’s at the time were grandfathered in. I have faithfully kept my certification current ever since.



*Continued on page 19*



**California Certified Legal Secretary**  
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## APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LSI Membership Card (if applicable), and fees to:  
**CCLS Certifying Board, 14403 Leibacher Avenue, Norwalk, CA 90650**

(Select one) ☐ **Northern California** (Select one) ☐ **Saturday, October 17, 2015**  
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- **Deadline:** Applications must be received 60 days prior to the examination date.
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- **Deferral:** Requests to defer to the next exam must be received at least 14 days prior to the exam date.

<b>EXAMINATION FEES</b> (Select Payment Type)		<b>Check</b> <input type="checkbox"/> Payable to "LSI" Mail to above address	<b>PayPal</b> <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
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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. July 2015





ROBERT B. JACOBS practices Real Estate, Business, Bankruptcy and Foreclosure Law in the Bay Area. Mr. Jacobs can be contacted at [Bob7@RBJLaw.com](mailto:Bob7@RBJLaw.com). The foregoing article is not a complete discussion of the subject addressed, and should not be relied on. Readers with specific questions or issues should consult an attorney. Copyright 2012 Robert B. Jacobs.

# He Better Watch Out . . .

BY ROBERT, JERIE AND BRIANT JACOBS, LIVERMORE-AMADOR VALLEY LPA

There has to be an exception. Somewhere buried deep in the laws of the United States, there has to be a legal exception for Santa Claus. I know there's got to be one. I just don't know where to find it.

How do I know this? Because without a big legal exception, Santa would be in a heap of trouble.

What kind of trouble? Every kind. Just think about it for a minute. Santa runs one of the biggest industrial, travel and shipping operations in the world.

When we talk about travel destinations, we might think of Maui or Cancun. But what about a travel agency that books a destination to every single house on the face of the planet? And all in a single night? The logistics are mind boggling. How Santa did all this before the age of the internet is unthinkable. But there it is - he visits every house, every where, and delivers just about every thing known to man.

And where does he get it all? He MAKES it. That's one big industrial operation.

So what kind of trouble could Santa be in? Well, there's plenty of paint and plastics in the things he makes. That means there's plenty of hydrocarbons involved in his manufacturing processes, and there's going to be industrial waste. He better not just stuff it under the nearest iceberg - because he might violate international laws and treaties about ocean pollution.

He better be careful where he sets up shop - he wouldn't want to disturb the natural habitat of the polar bears up at the North Pole. They are an endangered species - so any interference with their lifestyle or habitat could be a problem.

He better watch out for air pollution too, because with all of that manufacturing going on, there's sure to be smoke from all kinds of different things.

And what kind of labor force would he have to use? Just planning the travel and delivery logistics would take an army of elves. Getting the right present into the sack in the right order? No small thing. If the gift you want is at



the bottom of the sack - well, you see the problem. It's all got to be stacked in there just so. Besides all the logistical work, there's all of the manufacturing and other activities. Santa even has to deal with organized labor issues. First there's the general purpose labor union, the Brotherhood of Northern International Christmas Elves (BNICE). But Santa also has to deal with specialty unions, such as the elves that grow all those oranges that go into the toe of all the Christmas stockings. Their union is known as the Elves Garden Group of Northern Orange Growers (EGGNOG). Santa has to deal with other specialty unions, such as elves who make all the Christmas candy and also supply the North Pole with ice cream, which is the Cooperative Organization Of Kandy and Ice cream Elves (COOKIE). There are other specialty labor unions, such as a union that only installs locks on dollhouses, hinges on jewelry boxes and similar hardware (Santa's Little Elves who Install General Hardware, or SLEIGH). Elves can get a bit territorial - so even the smallest, least frequent tasks can require a union with a long name, such as the Generally Organized Officers and Dutiful Christmas Holiday Elves who Energize Rudolph (GOODCHEER). Kind of hard to imagine that periodically changing the batteries in Rudolph's nose requires a whole separate union -- but it does.

And all of this doesn't even get things "off the ground." Once everything has been made, Santa has to personally deliver it. I wonder if Santa has received appropriate licensing from the FAA to operate an aircraft in U.S. airspace? I dunno - maybe a "miniature sleigh with eight tiny reindeer" doesn't qualify as an aircraft. Really, who in their right mind would consider a sleigh to be an aircraft? Maybe Santa gets to "slide" by on this one.

## HE BETTER WATCH OUT...

But “laying aside” this issue, Santa still has to deal with all of the laws about getting the gifts into each house. Landing a sleigh on a rooftop without permission? Could be a trespass. But I’ve seen stop signs at homes that say “Santa! Stop Here! The Children inside have been good this year!” Maybe that kind of sign is an invitation - and then Santa would be a welcome guest. When somebody is invited onto a property, there’s no trespass. But going down the chimney? Could be breaking and entering - another legal problem. But the

cookies and milk waiting for him might be an invitation to come inside - and there’s no breaking or entering when someone is invited to come in.

Santa’s legal problems are almost enough to make your head swim. Good thing he’s got the world’s best legal team up at the North Pole. Their address? Holley, Jolley, Mistle and Toe, LLP, North Pole. And when it’s all done? On December 26, Santa is probably Ho Ho Hammered. **LS**

## I HAVE EARNED THE TITLE OF “LEGAL SECRETARY”

*Continued from page 16*

At approximately the same time I passed the PLS exam, I enrolled in the paralegal program and was not challenged by the program. The most challenging aspect was having to travel to the law library in downtown Oakland to do my research assignments (this was in the days before the internet). I breezed through the program and was awarded my paralegal certificate.

Just after I earned my paralegal certificate, my employer started hiring paralegals. It was decided that I would not take a paralegal position because, “legal secretaries with paralegal skills are the most valuable employee” and paralegals were paid less.

I think that over the years, people have forgotten that being a secretary, particularly a legal secretary, is an honored profession. Did you know:

It is believed that secretaries date back to ancient Egyptian times when scribes were entrusted with private and confidential matters. The word “secretary” is from the Latin word for “secret,” “secretum.”

During the Middle Ages, clergymen performed most secretarial work, thus the terms “clerk” and “clerical.”

Men dominated the profession until women took secretarial positions at home during times of war (as early as the U.S. civil war).

I am proud to respond that I am a Legal Secretary when asked if I am my boss’s assistant or paralegal. I earned the title. And no, being a legal secretary is not my job; it’s my career. **LS**

together everyone  
**TEAM**  
achieves more



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**For General Information contact:**

Stephanie Harrison,  
Conference Chair

Email: [stephmjb@sbcglobal.net](mailto:stephmjb@sbcglobal.net)

Telephone: (209) 761-4490

Lorraine Bettencourt, PLS, CCLS,  
Registration Chair

Email: [plsccls325@att.net](mailto:plsccls325@att.net)

Telephone: (209) 356-0815

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# BEAR IT ALL IN YOSEMITE

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Local Association: \_\_\_\_\_ LSA/LPA (full name)

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\_\_\_\_\_ Salmon \_\_\_\_\_ Chicken \_\_\_\_\_ Pasta

\* **Choose one:** ☐ tomato basil soup or ☐ salad

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**Please make checks payable to: February 2016 Conference Fund**

Mail Registration to: Lorraine Bettencourt, 3361 Shore Line Drive, Atwater, CA 95301

**For General Information Contact:**

Stephanie Harrison,  
Conference Chair  
(209) 761-4490 or stephmjb@sbcglobal.net

Lorraine Bettencourt, PLS, CCLS,  
Registration Chair  
(209) 356-0815 or plsccls325@att.net

**\*\*\*NO REFUNDS AFTER JANUARY 30, 2016\*\*\***



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 Vice President. Jennifer obtained her CCLS designation in October 2008.

# To Run, or Not to Run? To Participate, or Not

BY JENNIFER L. PAGE, CCLS, LSI VICE PRESIDENT

When I joined LSI and Marin County LPA in 1991 I had absolutely no intention of being anything but a “member” of this great organization. To network, attend educational seminars and meet new friends who had similar career goals. I attended monthly meetings, met wonderful women, learned from our speakers and really stayed in my Marin County LPA bubble. I had no real concept what LSI was other than it was the parent organization. This worked for a few years. Then I was asked to be a member of the board of my local association. I thought “why not?” And I accepted the position of Vice President. As the years went on I held various chairmanships and have been President several times. At first I was terrified of holding such important positions. I pictured myself the “worker bee” and never the leader. Why would anyone want to pay attention to what I had to say, accept my ideas, and have confidence in my ability to lead our group?

In May 1993, I attended my first LSI Conference. It was an Annual Conference in Oakland, California and Cheryl Woodson, CCLS, was the current and incoming President of LSI. I was overwhelmed and so excited at the same time. I attended workshops, luncheons and General Assembly of the Board of Governors. I was completely bowled over – I found myself among an incredible group of legal professionals. The educational workshops were top notch, luncheons informative, and the opportunity to network with legal professionals from all over the state of California was incredible. I was officially hooked.

I served my association as Governor and learned to let my voice be heard; not only did I get over the fear of addressing a room full of people, but I represented my local association which meant asking questions, expressing an opinion, getting more information on something that wasn't quite clear to me or my members. I could no longer just sit among the crowd and observe, I was now participating.



Over the years I have grown to love being a participant. I may not always have the best ideas, or ask the right questions. But, I have learned that it's okay for my voice to be heard, to express opinions and question something that doesn't make sense. I have been lucky enough to moderate the Newcomers Workshop and Luncheon several times and have thoroughly enjoyed sharing the world of LSI with others.

In 1999 I was first asked to be an LSI chairman. Again, another opportunity to grow, learn and participate. Since then, I have been honored to hold various positions in LSI. Each assignment has brought a new set of challenges. But, I still considered myself a “worker bee” and not a leader.

On May 10, 2008, I was honored and humbled to receive the President's Award presented by Lorraine M. Bettencourt, PLS, CCLS, LSI Past President 2006-2008. Receiving this award validated all the hard work and effort I put forth for LSI. The award sits on my desk at work and is a

## TO PARTICIPATE, OR NOT

constant reminder that my dedication to LSI and my local association is worth the effort.

I was happy to serve LSI as a chairman and had no intention of climbing any further up the ladder. However, a few LSI members came up to me and posed that terrifying question: “Why don’t you run for LSI Treasurer?” Followed by, “you’d be a terrific officer for LSI.” Never mind that I had no bookkeeping experience and had no interest in doing so. At the time my daughter was quite young, I was studying to pass the CCLS exam, I had a husband, extended family, etc. and, just plain NO I’m not going to do it. I pushed those questions aside and was determined to continue being a “worker bee” until I started to really think about my contributions to LSI and the membership. I have enjoyed working with others for the betterment of LSI and legal professionals that attend the conferences, our fellow members and those who seek out LSI for networking and education. I decided to go for it! And, in May 2016, I will have the honor and privilege of being installed as President of LSI.

If you are thinking about tackling this journey, I would encourage you to do so. Every single member of LSI has a voice, ideas, and something to share. If LSI is to continue into the future, it needs strong individuals to keep it moving forward. I have met many of you over the years and I do believe there are many of you who could take on this journey and make significant contributions to LSI and

its membership. Yes, we all have our own lives, families, friends, work outside of LSI but I would ask you these questions: “Why did you decide to join LSI?” “What do you expect to receive as a benefit of being a member?” “Do you have ideas that would help LSI continue on into the future?” “Do you enjoy being part of a successful team?” If you answered yes to more than one of these questions, you may well have what it takes to be a chairman and maybe even a leader.

When I began this journey, I had no idea what an incredible experience this would be and who I would become along the way. I have found a new level of confidence in myself that has spilled over into my day-to-day life both personally and professionally.

Do I still get a bit spooked to address a crowd? You bet! Do my palms still sweat, my legs go weak? You bet! Does my heart race just before I open my mouth? You bet! If these things didn’t happen, I would think something is wrong. No one wants to fail or be criticized. But, failure and criticism make you stronger.

I would encourage each and every one of you to consider serving LSI in some capacity. Contact the incoming President and ask to be a chairman or committee member. Take that first step, take a deep breath and PARTICIPATE!

## Helpful Websites

**Supreme Court of the United States**  
<http://www.supremecourt.gov>

**Office of the Attorney General**  
[www.ag.ca.gov](http://www.ag.ca.gov)

**California Courts**  
<http://www.courts.ca.gov>

**California Assn. of Legal Support Professionals**  
[www.calspro.org](http://www.calspro.org)

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

**California State Bar**  
<http://www.calbar.ca.gov>

**California Legislative Information**  
<http://www.leginfo.ca.gov>

**U.S. Citizen and Immigration Services**  
<http://www.uscis.gov>

**Public Access to Court Electronic Records**  
<http://pacer.gov>

**American Medical Association**  
<http://www.ama-assn.org>

**American Association of Law Libraries**  
<http://www.aallnet.org>

**National Notary Association**  
<http://www.nationalnotary.org>

**California Secretary of State**  
[www.sos.ca.gov](http://www.sos.ca.gov)





LYNNE PRESCOTT, CCLS, has been a legal secretary for over 30 years. She is a member of Sacramento LSA, and served as its president from 2013-2015. Lynne is employed as a legal secretary at the law offices of Messing Adam & Jasmine LLP in Sacramento, focusing on labor and employment law and public sector labor law. She earned her CCLS certification in October 2013, and was elected to the position of LSI Treasurer in May 2014.

# Techno Ethics: Ethical Concerns of Modern Technology

BY LYNNE PRESCOTT, CCLS, LSI TREASURER

Sacramento LSA was fortunate to have Danielle Gsoell of Veritext Legal Solutions make a presentation to our association last year regarding “Techno Ethics.” Some of you may have attended LSI’s First Quarterly Conference in August 2014, held in Sacramento, where Danielle also made this presentation for the conference attendees. Danielle is the Western Region Technical Client Solution Specialist for Veritext, and presented us with great information regarding the ethical concerns and obligations of today’s legal professional when dealing with modern technology. Below are some of the highlights of Danielle’s presentation.



## ETHICAL ISSUES

Why is it important to look at the ethical issues surrounding the use of technology in the legal field? Some of the basic tenets of practicing law involve the preservation of client confidentiality, protecting clients’ confidential and/or privileged information, and protecting attorney work-product. Technology security plays a key role in preserving all of these.

## TYPES OF PRIVATE INFORMATION

Danielle stated that there are two basic types of private information: disposable and detrimental. Disposable information would be something like a credit card. If someone obtained it, you could call your credit card company and have the account canceled. They would send you a new card, and there would be minimal damage and no ongoing damage. You could move on with a new card or account. Detrimental information, on the other hand, such as medical information or proprietary company information, is a different matter. If your medical records are released, there is no going back. As Danielle said, there is no way to get that “genie back in the bottle.” The same is true for company information. Once the 100-year-old secret formula for Granny’s Feel-Good Tonic is out, everyone knows. There is no way to “start a new account” like a credit card. There-

fore, this second type of information is much more significant. Law offices are more likely to deal with detrimental information than disposable information. Either way, you have an ethical obligation to keep both private and secure.

## EVER-EVOLVING TECHNOLOGY

Although technology moves fast, and often times much faster than the law, that is not an excuse for not making sure your technological information is secure. Just as ignorance of the law does not protect you, neither does ignorance of computers. The ethical obligations that surround the use, or even misuse, of technology are too important and potentially much too dangerous to ignore.

## HACKING AND PACKET SNIFFING

“Hacking” is the process of seeking and exploiting weaknesses in a computer system or network, usually involving countless hours of boring code or network analysis, looking for flaws that will give the hacker access to your computer or network. In other words, a hacker “breaks into” your computer. Believe it or not, there are also user-friendly hacking software packages that are available for sale or download, which allow hackers to access your information.

What is “packet sniffing?” As you communicate via Wi-Fi, packets of information are sent through the air

between you and the hotspot. These packets contain the information you are accessing. It could be your password being sent to your email server to access your email, or it could be the emails themselves. The hotspot is not the only one who can read these packets; they are floating through the air after all. If you are communicating with a client via Wi-Fi and including confidential information such as medical information, proprietary company info, social security numbers, etc., you will want to make sure no one can see that. When sending email, especially over a public Wi-Fi network, it is imperative to use an encrypted connection. Someone could be sitting just feet away from you at the local coffee house, sipping their latte, capturing everything you do online.

### **VIRTUAL PRIVATE NETWORKS (VPN)**

If your firm has its own email server, for instance, Microsoft Exchange, the best solution is to use a VPN connection to your network. This is a secure “tunnel” that funnels all your web activity, completely encrypted, through your firm’s secure connection. This is the most secure way to browse and work on open access points or public Wi-Fi.

### **MULTI-FACTOR AUTHENTICATION**

In the unfortunate event your password falls into the wrong hands, what can be done to add an extra layer of security? Normally when logging into a network, a website, etc., it will ask you for your username and password. This means the hacker only needs to gather two pieces of information to access your files. You can add another layer that substantially increases the security of your computer by adding what’s called a “token code.” Token codes are available through a small device that generates number “tokens” at fixed intervals. The user simply clicks a button, and the code is displayed. These codes are time-sensitive, so if not used immediately, the user needs to generate a new one. This means that unless a hacker has the actual physical device in addition to your user name and password, they cannot get access. This extra layer of security can drastically reduce your chances of unauthorized access.

### **CLOUD SERVICES**

How do “Cloud Services” impact the legal field? According to Danielle, if your internet services involve the use of the cloud, that means your data is stored on some other computer, some place out there on the Internet. You are required to make sure the data on that machine is just as secure as the computer on your desk. You need to ensure the services you use keep their data secure, encrypted, and backed up. You should review their security policies and ensure they comply with your own firm policies.

Danielle gave us two examples of instances where the use of cloud services was banned by certain companies. IBM actually banned the use of Siri, the voice transcription service on iPhones, due to security concerns. With Siri, your voice is recorded, sent to a server for transcription, and then sent back. In order to improve their transcription quality, Nuance occasionally examines the recordings. IBM was concerned their confidential, proprietary information might be leaked. While this example might be a little paranoid, it demonstrates that you do need to be concerned with any data in the “cloud.” When you use Siri or Dictation, the things you say will be recorded and sent to Apple in order to convert what you say into text and to process your requests. Your device will also send Apple other information, such as your first name and nickname, address book contacts, song names in your collection, etc. (collectively, your “User Data”).

Another example of a cloud service that could potentially expose your firm is Drop Box. This is a very easy way to share files with multiple computers, which is why Veritext has blocked it. As Danielle stated, “You can imagine the incredible amount of confidential data we deal with every day. From medical records, to social security numbers, to confidential movie star gossip, we needed to ensure it was not a simple drag-n-drop for someone to steal that data.” She emphasized that these are things we should all be aware of when crafting an IT policy. It is not just the security of the data, but the ease in which a rogue employee might steal that data. The ABA compiled a great chart that shows the opinion of many states on cloud computing. You can access that chart at: [http://www.americanbar.org/groups/departments/offices/legal\\_technology\\_resources/resources/charts/fyis/cloud-ethics-chart.html](http://www.americanbar.org/groups/departments/offices/legal_technology_resources/resources/charts/fyis/cloud-ethics-chart.html)

### **PASSWORD POLICIES**

The website SplashData recently released its list of the most popular Internet passwords for 2012. Because these passwords are the most common, they’re also the most vulnerable when it comes to digital security:

1. password
2. 123456
3. 12345678
4. abc123
5. qwerty
6. monkey
7. letmein
8. dragon
9. 111111
10. baseball

*Continued on page 26*

While it may be frustrating to remember long passwords and have to change your passwords often, it is the simplest precaution you can do to protect yourself. Danielle says to think of it like a seatbelt: a simple act that can have life-saving ramifications. There is a very useful website, [www.howsecureismypassword.net](http://www.howsecureismypassword.net) that will tell you just how long it will take a hacker to crack your password!

### WHERE DOES A COMPUTER GO WHEN IT DIES? IS IT EVER REALLY DEAD?

According to Danielle, this is actually a serious matter. Organized criminals have been able to retrieve confidential information from major governments and corporations due to the fact that most hard drives are just thrown away, not erased prior to disposal. Just deleting files does not actually delete them. It simply tells the hard drive it can now use that space. The data is actually still sitting there, which is why forensic data technicians can recover old, “deleted” files. An application that will erase your old hard drives before disposal is KillDisk. This application will comply with the most stringent standards adhered to by many governments, including our own. This is a far more effective process than just deleting the files before disposal. KillDisk, or a similar application, will actually write over the data with new data, often several times, ensuring none of the original information is retained. While it may seem like a lot of extra work, just imagine throwing away a client file without shredding it first!

### THINGS TO REMEMBER

- Two types of information: Disposable and Detrimental.
- While all confidential information should be kept secret, particular care must be used when dealing with the detrimental information. Once that cat is out of the bag, there is no going back.
- When traveling, connect via a VPN. Having that secure tunnel to the internet is imperative while traveling. There is no knowing who is sitting around you “listening” in on everything you send.
- Implement multi-factor authentication. Passwords can be guessed, discovered or leaked, but with another factor of authentication standing between the hacker and your files, you are much safer.
- Use caution when using cloud services. The ease and functionality of cloud-based services are alluring, but ensure they have safeguards in place to keep your data private. Also, refer to your local state’s opinion on using cloud services.
- DO NOT use applications like Skype for depositions! (We saw how “secure” that was in a video of actual trial testimony that was being delivered via Skype.)
- Use secure passwords -- one of the simplest things you can do to ensure better security.
- Thoroughly erase your old hard drives. Just as you would never throw away an unshredded client file, make sure your hard drives are digitally “shredded.”

Stay updated on technology!

LS



### ANSWER KEY TO P. 11 QUIZ

1. True
2. False
3. False
4. True
5. False
6. True
7. False
8. True
9. True
10. False





## LEGAL SPECIALIZATION SECTIONS SEMINARS

November Quarterly Conference – November 13-15, 2015

The deadline to register without a late fee is  
**Friday, November 6, 2015.**

<b>SECTION MEMBER:</b> Free with Advanced Reservations \$5 at the Door/After Deadline -- Handout Only: \$5	<b>NON-SECTION MEMBER:</b> \$15 with Advanced Reservation \$20 at the Door/After Deadline -- Handout Only: \$15
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<u><b>Transactional Law</b></u>  <b>Doing Business in California – What types of entities do we have?</b>  Tammy Manning Dickerson, Sr. Paralegal KaVo Kerr Group  <input type="checkbox"/> I WILL ATTEND   OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER	<u><b>Law Office Administration</b></u>  <b>Cyber Security Basics - What you need to know to protect your data.</b>  David Grant, JD, CIPP/US ALTEP  <input type="checkbox"/> I WILL ATTEND   OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER

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LSI will be offering an online class on an Overview of California State Court Discovery. This class will be a six-week, work-at-your-own-pace online session commencing November 2 and ending December 14, 2015. During the classes, the following topics will be covered:

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Demand for Production of Documents  
Requests for Admissions  
Depositions

Demand for Physical Examinations  
Deposition Subpoenas  
Discovery Timelines and Service  
Verifications

### CLASS SESSION OPENS MONDAY, NOVEMBER 2, 2015

Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the class.

The content of this class is designed for legal secretaries and those studying for the California Certified Legal Secretary examination.

The cost of the class is \$30 for LSI members/\$50 for non-LSI members. Each individual must register separately. Upon completion of the class, students will receive a certificate of completion from LSI.

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Email registration form NO LATER THAN October 26, 2015, to Shaylene Cortez, CCLS, LSI Legal Secretarial Training/Seminar Chair, [training@lsi.org](mailto:training@lsi.org) or mail to LSI (see website for mailing address). Checks should be made payable to LSI (Note: checks must clear before access will be released). Registration will also be offered online at [www.lsi.org](http://www.lsi.org) with PayPal. For further information or inquiries, email [training@lsi.org](mailto:training@lsi.org). No refunds after November 2, 2015.

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For more information, please contact Dawn R. Forgeur, CCLS, Legal Specialization Sections Coordinator, at [dawn.forgeur@stoel.com](mailto:dawn.forgeur@stoel.com).

## Dates to Remember

November 2, 2015	Overview of California State Court Discovery class begins	November 14, 2015	CCLS Workshop at November ConferenceAbility To Communicate Effectively – Word Usage
November 6, 2015	Deadline to register without late fee for Legal Specialization Seminars at August conference	December 1, 2015	Deadline for submission of articles for February issue of The Legal Secretary
November 13-15, 2015	LSI Second Quarterly Conference Riverside Marriott Hosted by Riverside LPA	January 12, 2015	LSI CCLS On-Line Study Group class begins
November 13, 2015	CEC Workshop at November Conference Sexual Harassment Law in California	February 26-28, 2016	LSI Third Quarterly Conference Tenaya Lodge, Fish Camp, California Hosted by Merced County LPA



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The cost of the 10-week Study Group is \$100 for LSI members and \$125 for non-LSI members taking classes for first time; and \$50 for LSI members and \$75 for non-LSI members repeating. Each individual must register separately.

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

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3. February issue (Third Quarter) December 1st
4. May issue (Annual/Fourth Quarter) March 1st

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Articles are submitted by email as an attached document using Word or WordPerfect. Biography should be included in the article and digital photos should be submitted as separate jpeg files.

All articles must be at least 500 words and no more than 2500 words.

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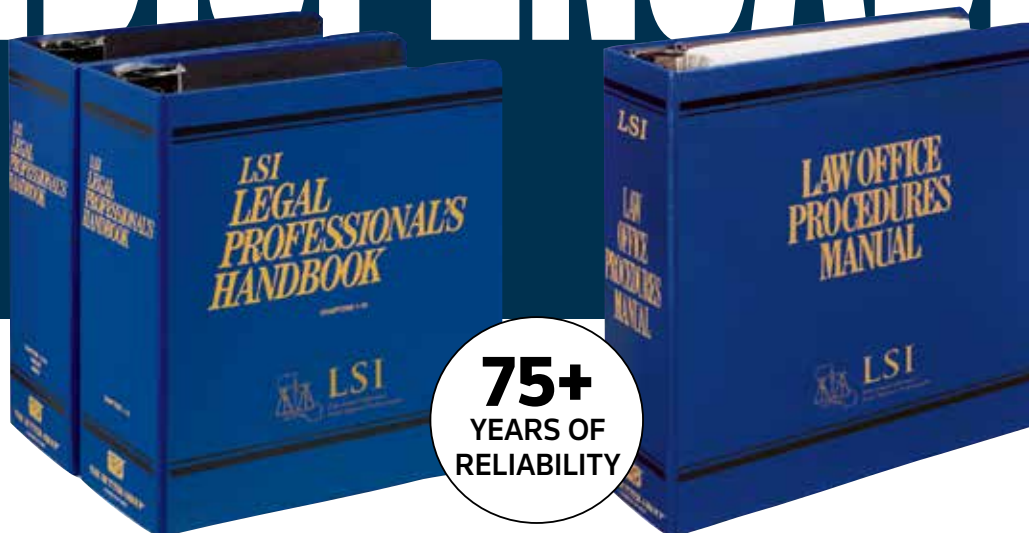
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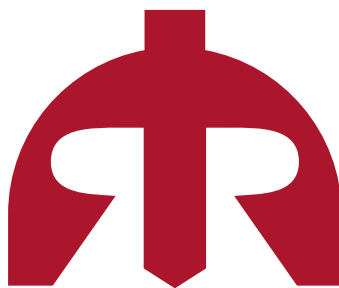


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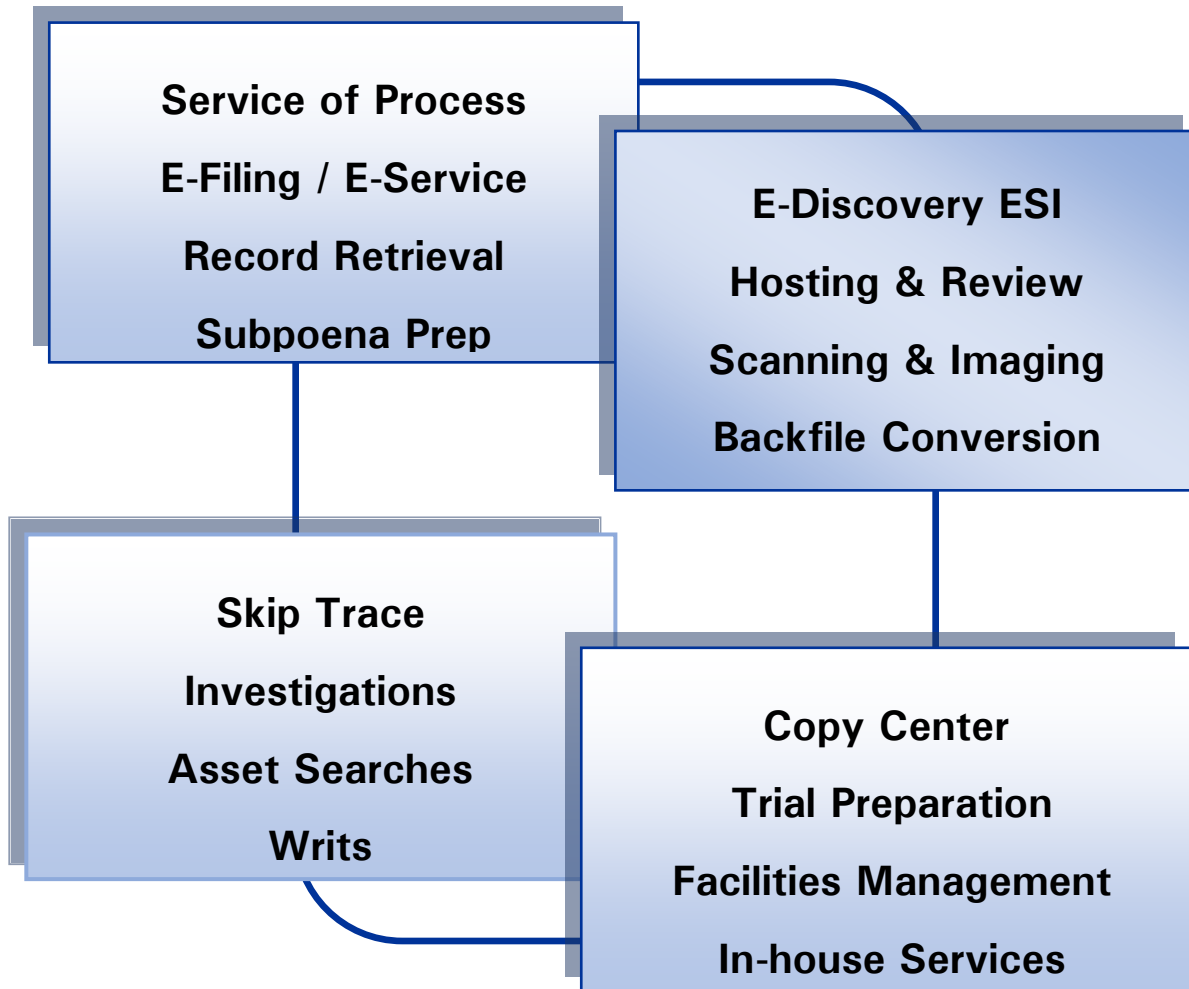
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