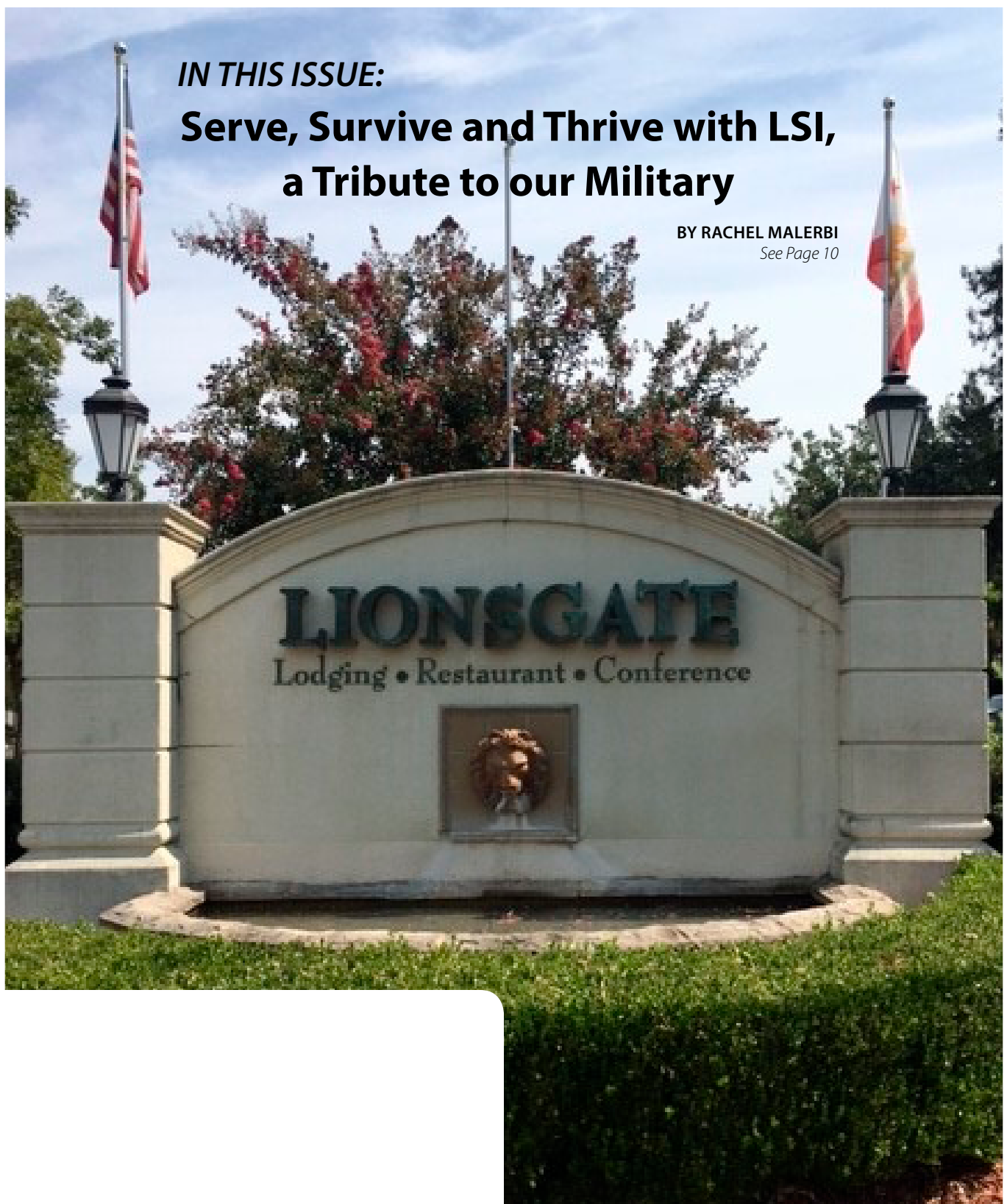


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Serve, Survive and Thrive with LSI, a Tribute to our Military

BY RACHEL MALERBI

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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 JENNIFER L. PAGE, CCLS, LSI PRESIDENT



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

Jennifer obtained her CCLS designation in October 2008.

Jennifer resides in Novato, California with her husband of 20 years Tony, their 15 year old daughter Emma and Midnight the cat.

As I'm writing this article, September is upon us and all the kids are back in school. Summer seems to race past faster and faster each year. While a lot of local associations go dark in the Summer, LSI was busy conducting business at the August Quarterly Conference hosted by Stockton-San Joaquin County Legal Professionals Association, and host they did. Thank you again to the members of Stockton-San Joaquin County Legal Professionals Association for hosting LSI.

Bylaw Amendments: In an effort to provide access to membership to more people in the legal community, the Governors unanimously approved the proposed Bylaw Amendments put before them at the August Board of Governors Meeting. The local associations can now offer membership in LSI to their student and associate members if they so choose. The Ad Hoc Committee who researched and came up with these proposed amendments did a very thorough and thoughtful job and I want to once again thank them. The members of the Committee were: Chair, LSI Parliamentarian Kristi L. Edwards, CCLS of Marin County LPA, Members Cynthia Saucedo of Alameda County LSA, and Mae Chester, CCLS of San Fernando Valley LSA. Hopefully many local associations will give their student and associate members the choice. The Marketing Committee now is tasked with putting together a plan to market to these new categories of members and I am hopeful that we will see an increase in membership.

Potential Increase in Per Capita: Your Executive Committee is looking into other areas to reduce expenses and increase benefits. It was announced to the Board of Governors and those in attendance at the August 2017 Quarterly Conference that the Executive Committee is considering increasing per capita in one of two ways: (1) \$5 increase in per capita that would include automatic membership in one Legal Specialization Section of choice; (2) \$20 increase and automatic membership in all six Legal Specialization Sections. If option (2) is put to the Governors for vote, it would actually decrease overall per capita and dues paid to LSI by \$55. Per capita would increase to \$40 and there would be no LSS dues. The Executive Committee has asked the Governors to discuss this suggestion amongst themselves and be prepared to discuss at the November Board of Governors Meeting.

The Legal Secretary Magazine: In terms of cutting expenses, your Executive Committee is also considering offering The Legal Secretary magazine via online distribution with an opt out function. This would be a considerable savings to LSI and moves us forward in technology. Please look for a poll regarding this issue.

Quarterly Conference Schedule: Your Executive Committee is also looking into possibly changing the Quarterly Conference Schedule; i.e., who reports during the Board of Governors Meetings, moving the Friday night LSS workshops to Saturday, etc. We are diligently listening to members' comments and requests, and will endeavor to implement positive changes to meet the ever-changing needs of our members.

Chapter Achievement Contest: The Governors asked that the categories be reviewed and possibly update the Chapter Achievement Contest, and the

PRESIDENT'S MESSAGE

Executive Committee, guided by the Vice President, came up with a points system versus the local association membership category system. While no solution is ever perfect, we hope this will encourage associations to submit their contest form and see how they do.

Online Classes: The online Beginning Legal Secretary Training (BLST) Classes, Online Discovery Classes and Online CCLS Study Program continue to be a huge success. We are also looking into outsourcing the BLST and Discovery Classes and possibly adding some other specialized subject matter classes, i.e. Motions, etc.

Nominations and Elections: May 2018 brings a changing of the guard to the LSI Executive Committee. My term as your President will come to an end, the other elected officers of the Executive Committee will move up the chain of command (if elected), and the office of Treasurer will be open for nominations. Now is the time to start thinking about your contributions to LSI. While you may not feel 100% confident in your ability to

eventually lead a group, don't count yourself out. Talk to the members of the Executive Committee, talk to Past Presidents, talk to your family and support system, and seriously consider running for office. Please also see LSI Executive Advisor Mary S. Beaudrow, CCLS's article in this issue.

November 2017 Quarterly Conference: Looking ahead, we have the November 2017 Quarterly Conference hosted by Placer County LPA at the Lion's Gate Hotel & Conference Center in Sacramento, California. This should be an exciting and new location for us to visit. So, make your plans accordingly to attend conference.

These are exciting times for LSI. While our membership may be a bit low, there is always a lull during transition and change. But, if those changes and transitions are done thoughtfully and with planning, we should see results in the very near future.

I hope to see you in November.

LS



LEGAL SECRETARIES, INCORPORATED CALIFORNIA CERTIFIED LEGAL SECRETARY WORKSHOP REGISTRATION FORM

“LEADING A STUDY GROUP”

Second Quarterly Conference
Lions Gate Hotel & Conference Center, Sacramento, CA
Saturday, November 11, 2017, 7:30-8:30 a.m.
Cost: \$5.00 for LSI members/\$10.00 for non-LSI members

Whether you are a CCLS or are striving to become a CCLS, leading a study group for your local association is a rewarding and beneficial endeavor. Attend this workshop to get tips for leading a study group, including essential information to pass along, areas to cover in your lesson plans, how to create a lesson plan, and the types of homework/review assignments you should create. Benefits to you? You will always learn something new, and you can earn CCLS credits for leading a study group!

REGISTRATION DEADLINE: November 7, 2017

Name: _____ Email: _____

Address/City/State: _____

Phone (Work): _____ Local Assn.: _____ LPA/LSA

Please make check payable to LSI. Mail registration to Terrie Quinton, CCLS, c/o Duckor Spradling Metzger & Wynne, 101 W. Broadway, Ste. 1700, San Diego, CA 92101, and email registration to quinton@dsmw.com.

CCLS CREDIT WILL NOT BE GIVEN FOR THIS WORKSHOP



MARY J. BEAUDROW, CCLS, is the Executive Advisor of Legal Secretaries Association 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. Her e-mail address: marybeau59@att.net

NOMINATIONS AND ELECTIONS

BY MARY J. BEAUDROW, LSI EXECUTIVE ADVISOR

Prior to January 15, 2018, I will be sending out to the Governor of each local association a form for the nomination of candidates for elective office of LSI, to be completed and returned to me by February 5, 2018. At the February 2018 Quarterly Conference, I will read a list of candidates for office that I have received. Please note that nominations may be made from the floor. All qualified persons submitting Acceptance of Nominations forms received by March 5, 2018, will be included in the ballot to be voted on at the 2018 Annual Conference in North Hollywood.

Have you thought about running for office of LSI? I have to say that serving as an officer for LSI has been an extremely rewarding experience. I remember when making the decision to run for the office of LSI Treasurer that I was scared and nervous at the same time. In making my decision, I also had to look at the big picture that not only was I running for the office of LSI Treasurer, but essentially running for the office of LSI President. I had to look at what the duties of each office entailed and ask myself if I felt I could fulfill these duties.

In looking at the duties of LSI Treasurer, I knew that I needed to be familiar with QuickBooks, because that is the accounting software program that the Treasurer uses. The other duties of the office include making bank deposits, paying bills, being familiar with certificates of deposits, and creating a budget. In speaking with other past treasurers, I knew that sometimes I would have to devote easily several hours each week to my duties. Luckily, I had the support of my employer and family to take this leap, which I have never regretted.

Serving as LSI Treasurer really took me out of my comfort zone. I won't deny that I was very nervous the first time I had to read the Treasurer's report at the 2008 August Quarterly Conference. However, I got through it



and during that weekend several members came up to me and told me that I did a really good job.

The next office I held was that of LSI Executive Secretary. I knew my duties would include taking the minutes at all of the Board of Governors meetings, and at the Annual Conference, taking roll call at all of the meetings, and being the moderator at the Governors' luncheons. This office would require me to be familiar with using MS Word, and to have a good command of the English language. I was ready to serve.

I really enjoyed being the moderator of the Governors' luncheons, because it gave me an opportunity to hear their voices. I always encouraged them to share their ideas and suggestions and how the Executive Committee could improve LSI.

The next step on the LSI ladder is the office of LSI Vice President. Duties for this office include: being the local association counterpart for membership and programs; receiving and acting upon applications of members-at-large; chairing the Marketing Committee; being in charge of the Chapter Achievement Award Contest; and to act as an assistant to the LSI President. You also are the moderator of the Open luncheon. As you can tell from what I have listed above, this is a busy office.

One of my favorite duties while serving as Vice President was being the Chair of the Marketing Committee. You work with the members of this committee to make sure the website is current and accurate, and to market the association through continuing educational programs, the California Certified Legal Secretary program and the Legal Specialization Section Seminars. Our marketing meetings would at times be brainstorming sessions as to how we could best promote LSI to the legal community.

May 18, 2014, the day I was installed as LSI President, was one of the most memorable days in my life. I had worked hard for six years to reach this point that the membership elected me to serve in this capacity, and I was ready for the challenges and rewards that were ahead of me.

As President, you will appoint all chairmen and appointed officers of the corporation. You will oversee them and provide them the support and guidance they need to perform their duties. You will work hand-in-hand with the presidents of the local associations and make yourself available to any member, officer or chairman who

may require your assistance or counsel. You will serve as moderator of the President's luncheons at all quarterly conferences, and conduct the business of the corporation at each quarterly and annual conference.

Besides all of the duties that I have listed for every office, you are expected to visit local associations whenever possible throughout the year. You may be a guest speaker, an installing officer, and just a guest in attendance at the local association's meeting.

My intention for this article is to give everyone an overall picture of what it is to serve as an LSI officer. It's not just about sitting at the head table - it is a lot of hard work that requires a huge commitment of time, energy, and talent. Besides the hard work that is involved, it is also a lot of fun. More importantly, I have made lifelong friends, which I wouldn't trade for anything.

LS

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REGISTRATION AND PAYMENT VIA CREDIT CARD AT WWW.LSI.ORG PREFERRED

Friday, November 10 – 7:30 p.m. to 9:00 p.m.	
<p><u>PROBATE & ESTATE PLANNING</u></p> <p>Probate Referee</p> <p>Kevin P. Eckard Probate Referee</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>	<p><u>TRANSACTIONAL/SPECIALTY LAW</u></p> <p>Serving The People Who Serve Us: Military Legal FAQs For Civilian Legal Professionals</p> <p>Thomas A. Woods Stoel Rives LLP</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>
Saturday, November 11 – 10:30 a.m. to 12:00 p.m.	
<p><u>CRIMINAL AND FAMILY LAW</u></p> <p>Workplace Violence **Not eligible for MCLE**</p> <p>Lt. Scott French Elk Grove Police Department</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>	<p><u>CIVIL LITIGATION</u></p> <p>Citations: Cite Checking / CSM & Bluebook</p> <p>Mary-Beth Moylan McGeorge School of Law</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>
Saturday, November 11 – 4:00 p.m. to 5:30 p.m.	
<p><u>FEDERAL LAW</u></p> <p>Removing to Federal Court</p> <p>Bryan L. Hawkins Stoel Rives LLP</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>	<p><u>LAW OFFICE ADMINISTRATION</u></p> <p>Word Tips & Tricks* **Not eligible for MCLE**</p> <p>Laurie Stewart Stewart Training Services</p> <p><input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER</p>

Name: _____ ☐ CCLS ☐ Paralegal ☐ PLS

E-mail: _____ (please write clearly, confirmations are emailed)

Local LSI Association (if applicable): _____ ☐ LSA ☐ LPA

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Dawn R. Forgeur, CCLS, LSS Coordinator, 500 Capitol Mall, Suite 1600, Sacramento, CA 95814

The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these seminars have been approved for minimum MCLE credit of at least 1.0 hours each, by the State Bar of California unless otherwise specified.

*Pursuant to the CCLS Standards of Recertification, Section 4: Of the required 15 credit hours, no more than 6 credit hours will be allowed for education regarding administrative and/or mechanical (legal secretarial science) functions performed by legal support staff, and of those 6 hours, no more than 2 credit hours shall be allowed for educational courses where the topics are not unique to work done by legal support staff. It therefore is possible that courses which are approved for a specified number of credit hours will not be given full credit by the Certifying Board.

****Speakers and topics are subject to change without notice due to the speaker's availability.****

PER LSI STANDING RULES, CHECKS ISSUED TO LSI WHICH ARE NON-NEGOTIABLE BECAUSE OF INSUFFICIENT FUNDS OR OTHER REASON SHALL BE REPLACED IMMEDIATELY BY CASH, A CERTIFIED CHECK OR MONEY ORDER FOR THE AMOUNT OF THE ORIGINAL CHECK, PLUS \$25 PENALTY, PLUS THE ACTUAL COST CHARGED LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL CHECK.



HEATHER EDWARDS is LSI's current Vice President and is 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 25 years Ernie, and their 4 children, Kennedy, Koree, Kaden and Kamden.

The Golda J. Cooper Chapter Achievement Contest - It's a TEAM Effort!

BY HEATHER EDWARDS, LSI VICE PRESIDENT

The Chapter Achievement Contest was established in 1972, during Ivey Person's term as LSI President. The purpose of the contest was and continues to be to encourage local association participation at the local and state levels.

The contest is called the Golda J. Cooper Chapter Achievement Contest and the prize money was previously funded by Stuart F. Cooper to honor Golda's dedication to LSI. Golda J. Cooper was an honorary member of LSI. However, "she attended conferences, board of governors meetings and installations as if she were a voting member. She was an ardent supporter and she made genuine friends with the membership." (*Excerpt from The History of Legal Secretaries, Incorporated (rev. 11/2016)*)

LSI now funds the prize money, but the spirit of the contest and the spirit of Golda J. Cooper lives on through the contest bearing her namesake. Local Associations and their members are encouraged to participate in a variety of ways, both through their own association and in support of neighboring local associations. While the points counted are for a member's own association, it is important to visit neighboring associations, to network and support them in their endeavors.

How does the contest work? Tallying of points typically falls to a local association's Governor who can obtain the contest form via LSI's website. Many associations have taken the form and customized it to meet their level of activity. The customized form is then distributed to the members for tracking purposes. Some associations even include the tracking form in their newsletters.

The current contest tracks activity from April 1, 2017 through March 31, 2018. The fully completed original Chapter Achievement Contest form is to be submitted to the LSI Vice President postmarked bearing a date no later than April 16, 2018.



At the August 2017 Quarterly Conference, it was announced that a significant change was made to the current contest for this fiscal year. Instead of calculating points based on local association membership size (accrued as of March 31, 2018), the Group Categories are now based on **TOTAL POINTS** accrued as of March 31, 2018 as follows:

Group A:	0 – 10,000 Points
Group B:	10,001 – 20,000 Points
Group C:	20,001 – 30,000 Points
Group D:	30,001 – 40,000 Points
Group E:	40,001 – 50,000 Points
Group F:	50,001 – and up

We hope this new points system is more equitable and will give all associations, no matter how big or small, a chance to compete in this historical contest. I encourage each and every one of our local associations to submit an entry form.

At Annual Conference in North Hollywood next May 2018, I will have the pleasure of announcing the winners and presenting them with prize money and a certificate recognizing their efforts.

Let's make this a TEAM effort and start tallying those points!

LS



RACHEL MALERBI has been in the legal field since 2004 and has worked exclusively in the area of Family Law. She obtained her Paralegal Certificate from MTI College in Sacramento, California in 2004. In November 2012, Rachel joined the Law Office of Cynthia C. Jamison as Paralegal and Office Manager. Rachel has been a member of Placer County LPA since 2005; serving as Treasurer and President and is currently serving as Vice President. Rachel began to serve LSI in 2016 when she was appointed as the Professional Liaison/Day in Court Chair. Rachel resides in Lincoln, California and is an “Active Auntie” to her niece Ashley, and nephews Ethan and Logan.

Serve, Survive & Thrive with LSI, a Tribute to our Military

BY: RACHEL MALERBI – SUBMITTED BY PLACER COUNTY LPA

Placer County LPA welcomes you to LSI's 2nd quarterly conference in McClellan. This conference will take place at an old Air Force Base over Veteran's Day weekend November 10 - 12, 2017, so, of course, the theme of our conference is military related. Please join Placer LPA as we Serve, Survive, & Thrive with LSI, and help us provide “A Tribute to Our Military.”



The conference will be held at the Lion's Gate Hotel and the McClellan Conference Center. These two facilities are just short of a ½ mile away from each other on a flat road. If you prefer not to walk, there will be a shuttle available, or if you have a car you can drive from one location to the other as parking is available at both locations. Room rates are \$115 per night for a single or double occupancy, and rollaway beds are available at the rate of \$15 per night. Each room has a queen bed or two double beds. All rooms are 100% smoke-free and contain mini refrigerators, microwave ovens, and coffee makers. Complimentary Wi-Fi is also provided, as is complimentary self-parking. Reservations can be made online at: <https://tinyurl.com/Lions-Gate-Hotel-Nov-2017> or by calling the hotel directly at 916-643-6222 ext. 1. Please identify yourself as being a part of “LSI” in order to get the group rate.

The hotel provides a complimentary Continental Breakfast Buffet for hotel guests, which we have arranged to have served at the McClellan Conference Center. You might also want to check out the O'Club Restaurant during your stay for a possible dining option. The O'Club is a full service restaurant that provides many Farm to Fork options.

A bar/cocktail lounge is also available for your drinking pleasure. If the weather permits, you can enjoy the outdoor swimming pool and patio area during your stay.

Be sure to check out the Coffee Hangar at the McClellan Conference Center. The Coffee Hangar is the perfect place to grab a quick bite such as gourmet soup, salads, and sandwiches. This is the place to get your caffeine fix and enjoy Terranova Fine Coffee & Teas, made to order.

Other dining options less than a mile away include: Subway, Burger King, Adalberto's Mexican, Jasper's Giant Burgers, and the Golden Corral.

California Family Fitness is located nearby and day passes can be purchased for \$5. A jogging path is located near the hotel for those walking and running enthusiasts.

Aerospace Museum of California is 1.2 miles away and is definitely worth checking out. In observance of Veteran's Day, they will have a FREE “Open Cockpit Day” with as many as 20 planes available for viewing (weather permitting) on Saturday from 10:00 am to 4:00 pm, including the C-53 D-Day Aircraft, A-10 Thunderbolt, and the ‘Top Gun’ F-14 Tomcat.

The hotel and conference center are conveniently located off of I-80, minutes away from both the Sacramento International Airport and Sacramento's downtown area.

For those flying, the hotel is providing complimentary shuttle service from SMF Airport to the hotel. The hotel requires at least 48 hours advance notice when reserving their shuttle and you will need to provide arrival time, airline, and a cell phone number for the driver to reach you.

Our Friday night reception theme is "Boot Camp" where you will begin to SERVE and start your conference weekend Basic Training as you mix and mingle with our Exhibitors in an old Air Force Hangar.

On Saturday your "Boot Camp" experience will continue with educational workshops throughout the day. For added fun our conference committee will pay special homage to Rosie the Riveter, the World War II Cultural Icon. LSI's own history says that during the years of World War II the efforts of the officers were, of necessity, and directed

towards holding the organization together since travel was curtailed and many members enlisted in the armed services or went to work in war plants. Despite the difficulties these women encountered, and due to the untiring efforts of the leadership, the association now known as LSI was able to SURVIVE and in post-war years even begin to grow.

Our Saturday evening festivities will feature a USO Show with the Fred Morgan Band for our "Graduation Banquet." We also are delighted to have local author Erin Lyon (aka Attorney Erin Tognetti) join us at our "Deployment Brunch" on Sunday to discuss her latest novel: I Love You Subject to the Following Terms and Conditions -A Contract Killers Novel. Hopefully Erin will inspire us with a few laughs as we deploy back to our respective associations to THRIVE until we can meet again.

Placer County LPA looks forward to seeing everyone and honoring our military families all weekend long.

LS

Helpful Websites

Supreme Court of the United States

<http://www.supremecourt.gov>

Office of the Attorney General

www.ag.ca.gov

California Courts

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

California Association of Legal Support Professionals

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

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CCLS QUIZ:

LEGAL COMPUTATIONS - MATH

DIRECTIONS: USING THE TABLE PROVIDED BELOW, DETERMINE THE CORRECT EXECUTOR FEES FOR EACH ESTATE VALUE LISTED. YOU MAY USE A CALCULATOR FOR THIS EXERCISE.

ON THE FIRST \$100,000 OF THE ESTATE, 4%
ON THE NEXT \$100,000 OF THE ESTATE, 3%
ON THE NEXT \$800,000 OF THE ESTATE, 2%
ON THE NEXT \$9,000,000 OF THE ESTATE, 1%
ON THE NEXT \$15,000,000 OF THE ESTATE, ½ OF 1%, AND
ALL OVER \$25,000,000 TO BE DETERMINED BY THE COURT

- | | |
|----|--------------|
| 1. | \$13,954,573 |
| 2. | \$736,598 |
| 3. | \$9,287,529 |
| 4. | \$243,756 |
| 5. | \$1,000,072 |

DIRECTIONS: PERFORM THE CALCULATIONS NECESSARY TO ARRIVE AT THE CORRECT ANSWER FOR EACH QUESTION BELOW. YOU MAY USE A CALCULATOR FOR THIS EXERCISE.

6. YOU PURCHASED YOUR HOUSE FOR \$450,000, AND IT WAS LATER REASSESSED FOR \$300,000. WHAT IS THE DOCUMENTARY TRANSFER TAX IF THE TAX RATE IS \$1.10 PER \$1000 OF THE PURCHASE PRICE?
7. YOU HAVE TAKEN A LOAN OF \$19,000, WITH INTEREST AT 12% PER ANNUM. YOUR MINIMUM PAYMENTS ARE \$500 PER MONTH. WHAT IS YOUR PRINCIPAL BALANCE AFTER SIX MONTHS?
8. WHAT IS THE DAILY RENTAL RATE FOR A PROPERTY WHOSE MONTHLY RENT IS \$1,032?
9. ON MARCH 15, 2017, YOUR SALARY WAS \$63,900 PER YEAR. YOU WILL RECEIVE A 3% RATE EVERY YEAR ON JANUARY 1. WHAT WILL YOUR ANNUAL SALARY BE ON MARCH 15, 2019?
10. IF YOUR CLIENT DOES NOT PAY SETTLEMENT FUNDS OF \$32,456 TO PLAINTIFF WITHIN 30 DAYS OF SETTLEMENT, INTEREST WILL ACCRUE IN THE AMOUNT OF \$15% PER ANNUM FOR EACH DAY THE PAYMENT IS LATE. YOUR CLIENT PAYS THE SETTLEMENT FUNDS ON THE 63RD DAY FROM THE DATE OF SETTLEMENT. WHAT IS THE TOTAL PAYMENT BEING MADE?

CCLS QUIZ ANSWERS ON PAGE 15



JAN M. ROOS, Esq. is a founding partner at Norman Roos LLP, a Sacramento, CA based law firm providing business advising and transactional services. Jan is a business attorney and entrepreneur, and regularly provides discounted or pro-bono legal services throughout the community.

Life (and Death) in the Cloud

With an ever-increasing amount of our personal, familial and financial data housed online (or “in the cloud”), it’s time to start thinking seriously about what happens to all that data when we pass on. Is it destroyed? Can it be transferred to someone else? Can it be referenced in a will, trust or other testamentary instrument?

THE DIGITAL ASSET CONUNDRUM

Whether it’s your email accounts, photo albums, online bank accounts, software licenses, or other internet-based items of value, these “digital assets” are all theoretically at risk if something happens to you and you haven’t accounted for them. Unlike physical assets, like real estate and personal property, digital assets are not easily ascertainable, and often cannot be found through a simple search (like a county title search for property, etc.).

Moreover, not accounting for the careful management of your digital assets can leave them open to fraudulent activity. If these assets are not added to your estate plan in one form or another, it could result in a major headache for family members or, worse, leave them open to personal and financial disruption.

Most online accounts are governed by an end-user license agreement or terms-of-service agreement, which is typically available to every user but usually goes unread. However, the terms contained in those agreements have historically been unique to each service provider, leaving users (or their executors and estates) scrambling to read through tens or hundreds of pages of legalese that dictates how their digital assets may be accessed after death. Those user agreements, when considered alongside federal and state privacy laws, can make it very difficult for loved ones to gain access to digital assets.

YOUR DIGITAL ESTATE PLAN

Fortunately, an ever-increasing number of states are proposing and approving laws that help clarify the rules for how executors and others can access and manage the online accounts of someone who has passed away. Known as the “Revised Uniform Fiduciary Access to Digital Assets



Act,” these laws provide a comprehensive legal framework through which an executor can manage a decedent’s digital accounts.

The Act noted above proposed a three-pronged framework to determine how access to online accounts and digital assets is handled. These start with service providers affirmatively offering a clear mechanism specifically designed to help executors or loved ones access the accounts of a deceased user. If that policy does not exist for a given service provider, then the account owner’s directions in a testamentary instrument would control. If neither of those exist, then the regular terms of service for the given provider would control the situation, which is not ideal since those terms and policies typically take a “no-access” approach because, to them, the potential risks of granting unauthorized access to private data are far more costly than simply denying it.

Without question, the best approach to managing your digital assets, and planning for how they may be accessed and controlled by your estate after death, is carefully creating policies in your own estate plan (will, trust or otherwise). You should note specific online accounts that are subject to the policies you set, similar to asset schedules for real and personal property. The more detailed and clear you can be, the better chance your estate's executor or loved ones will have to access and properly administer your digital assets. Planning is everything.

BEYOND ESTATE PLANNING

Getting around to creating a full estate plan (or even updating an existing one) can be daunting and time consuming. It's worth it, but there are a number of things you can do in the meantime to prepare for that process. Each one will help get you closer to controlling your digital estate during life, and make it easier for loved ones to gain necessary access after death.

HERE ARE A FEW SUGGESTIONS TO GET STARTED:

- Make a "Digital Asset" List – write down all (or at least your most important) online accounts in a format that can be easily understood. You don't need to include username and password info necessarily (see below), but this can be a great starting point to guide executors and loved ones who may need to search for your important accounts.
- Use an Online Password Manager – several reputable companies (like "Lastpass" and "Keeper") offer simple password management solutions that require you to only remember one master password and lock all specific account passwords in an online "vault." These services are great since you only need to set and remember one very strong password, and the services "auto-fill" your other passwords as-needed when you log on to

specific services. It's also much easier to communicate a single password to a loved one or executor, rather than a unique password for every single service.

- Start thinking about the policies you might want carried out for your digital assets after death. Start with basic concepts (how your social media or online photo accounts might be handled), and work your way onto more complex concepts (like management of online bank accounts and email accounts). Starting this process now will make it much easier to fill out your estate plan with the time is right.

IN THE END

Ultimately, we're all going to face difficult post-life questions. The best way to approach them is to start the conversation, revisit it from time to time, and eventually put a proper plan in place. The process can actually relieve stress and put you and your loved ones at ease. Losing a loved one is difficult enough; having to sift through endless online user service agreements to access that loved one's accounts only adds to that difficulty. Anything you can do to simplify the process will be much appreciated on the other side.

LS

ANSWERS FROM QUIZ ON PAGE 13

CCLS QUIZ: ANSWER KEY

1. \$132,772.87
2. \$17,731.96
3. \$105,875.29
4. \$7,875.12
5. \$23,000.72
6. \$495.00
7. \$17,140.00
8. \$34.40
9. \$67,791.51
10. \$32,896.22



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TERRIE QUINTON, CCLS, has worked as a legal secretary since 1985, first in Los Angeles then moving to San Diego in 1990. Terrie is LSI's California Certified Legal Secretary Chair, and has also served as a member of the CCLS Certifying Board, and was San Diego LSA's CCLS Chair for several years. Terrie has been a CCLS since 1997. Terrie is a past president of San Diego LSA, and has been active in LSI for many years.

EC, CEC, PRC...XYZ

BY TERRIE QUINTON, CCLS, LSI CCLS CHAIRMAN

All those many years ago when I first became involved with San Diego LSA and LSI, I was thoroughly confused by all the initials that were thrown at me at every turn. Do you feel like you are sinking in a big bowl of alphabet soup, too? Here's a breakdown of initials you might hear around the LSI world.

EC – Executive Committee. The Executive Committee consists of the President, Vice President, Secretary, Treasurer, Parliamentarian, and Executive Advisor. These are the individuals who run the day-to-day business of LSI.

CEC – Continuing Education Council. The members of the Continuing Education Council are the Educational Program Coordinator, Legal Procedure Chair, Legal Professional Training/Seminar Chair, California Certified Legal Secretary Chair, Editor-in-Chief, and Legal Specialization Sections Coordinator. The CEC oversees all of the educational programs offered by LSI, including seminars at quarterly conferences, legal secretary training, preparation for the CCLS Exam, providing updates from courts, and maintaining LSI's MCLE provider status with the State Bar. The CEC also works closely with the LSS and PRC to offer assistance with their respective duties.

PRC – Publications Revision Committee. The PRC consists of the Editor-in-Chief, the Editor of the Legal Professionals Handbook, the Editor of the Law Office Procedures Manual, and six Assistant Editors. These individuals are responsible for updating these two publications, as well as the LOPM Instructor Guides, which are used by instructors using the LOPM in teaching classes.

LSS – Legal Specialization Sections. The LSS is comprised of an LSS Coordinator and six Section Leaders, offering workshops at each LSI conference in Civil Litigation, Transactional Law, Criminal and Family Law, Federal Law, Law Office Administration, and Probate and Estate Planning. In addition to the workshops, the LSS publishes a quarterly newsletter for its members with informative articles in each of these areas.

CCLS – California Certified Legal Secretary. The California Certified Legal Secretary is a program sponsored by LSI, providing advanced certification for legal secretaries, paralegals, and other legal professionals who have been employed as such for a minimum of two years. The 8-hour exam covers California Legal Procedure (civil litigation, family

law, probate, real estate, corporate), Legal Terminology, Legal Computations, Skills, Ability to Communicate Effectively, Reasoning & Ethics, and Law Office Administration. The CCLS Certifying Board is the autonomous governing board for the program, and write and proctor the exams, as well as the administrators of the program. The CCLS Chair conducts workshops at LSI's quarterly conferences, as well as two On-Line Study Groups each year to prepare examinees for the test.

BLST – Beginning Legal Secretary Training. The Legal Professional Training/Seminars chair conducts multiple on-line BLST classes each year designed to train those who are new to the legal profession, and as refreshers for those who are experienced.

LSRG – Legal Secretaries Reference Guide. The LSRG is one of LSI's publications and is designed as a primer for legal secretaries and other legal professionals. The LSRG provides the basics of pleadings, discovery, office conduct, and much more. The LSRG is also used as the text for the BLST classes. The LSRG is edited by the legal Professional Training/Seminars chair, with the help of the CEC.

LOPM/LPH – Law Office Procedures Manual / Legal Professionals Handbook. The LOPM and LPH are LSI's other publications. The LOPM is a single-volume book that provides steps to completing various tasks that legal professionals face every day, such as preparing and filing a complaint or incorporating a new company. The LPH is a two-volume book that provides more in-depth information regarding various areas of law. The LOPM and LPH are edited by the PRC, and are published by The Rutter Group.

LSA/LPA – Legal Secretaries Association / Legal Professionals Association. All local associations are either designated as an LSA or LPA, based on the preference of each individual association. There is no difference in the membership or the rights of an LSA or LPA.

I hope this helps to make sense of your bowl of alphabet soup!



LEQUITA J. HODGE, CCLS has been a legal secretary for 39 years. Twenty-two of those years have been with Sedgwick LLP in their Los Angeles office. She has been involved with the Long Beach Legal Professionals Association (LBLPA) since 2008. She is the Governor of LBLPA and was honored to serve on the CCLS Certifying Board for LSI. She resides in Norwalk, California. Of most importance to her are her seven children and five grandchildren.

I Paid My Membership Dues, Now What's Next?

BY LEQUITA J. HODGE, CCLS - SUBMITTED BY LONG BEACH LPA

You were introduced to this organization to meet people. Individuals that did what you do day in and day out. People you could meet and exchange ideas with, build friendships with, network, meet and/or become a mentor, and to learn. You're at a meeting and searching for that one friendly face in the crowd, especially since you've had one of those days. Okay, relax. I'm a member now. Let's see . . . do I jump in? Into what? Do I ask someone is there anything I can do? I mean I don't want to seem pushy or bossy. Do I wait for someone to ask me? They all seem so efficient, like they know what they are doing. I don't want to rock the boat and mess things up.

They're (officers) all sitting at one table. If I say something I might be interrupting an important conversation. I'm thinking that only because why else would they all be at the same table unless there were important matters that they need to take care of during the meeting. I shouldn't feel so intimidated. They spoke to me when they gave me the Welcome packet. They let me join. Intimidated? Strange but somehow I do feel that way. A group of women (and sometimes a few men) that do the same thing I do, but I don't feel like I fit in. Each table is full of people laughing with each other so they must be having a good time. Ah, the key, bring someone with you so you have someone to talk to.

I can only imagine what some people are thinking when they come into a room that has already been occupied and everyone appears to be engaging in meaningful conversation or at least joking and having a good relaxing time. Of course you are greeted by someone when you walk in since they need to make sure you paid for the meeting.



To some this may seem overly dramatic and it may be to a point. The Association may not be a social club but sometimes it can have the feeling of an exclusive one. You only made it in because you could afford to pay your dues or you liked the dinner topic. It is the new members responsibility to join in, right? Make yourself at home and decide what or where they want to get involved. Really? Shouldn't it be the responsibility of the established (see I didn't say old) members to reach out? It's our responsibility to let them know what needs to be done, what we have to offer and where they are needed and can be beneficial to the Association.

Years ago I recall attending a meeting. It was around election time and someone asked me to be executive secretary. I think it was only my second meeting. How overwhelmed I felt but in a good way. They were pulling me in. I was valued at first sight. Whether we admit it or not we all want to feel valued. Accepted.

Someone could go over the welcome packet with them. It's not voluminous so it won't take a long time. Yes, they are basically self-explanatory but this makes you feel special even if you don't want or have the time to hold an office. Someone took the time to explain and then to find out about you. You may consider to assist, or pitch in on a special project when brought up at one of the meetings. Explain what the offices mean. How valuable they are, as well as the people who hold them, to the Association. Throw out how valuable each and every member is to the Association. The Association is aware that there is so much information we can get on social media, google, Wikipedia but it doesn't compare to hearing a live speaker. Being able to ask questions afterward. To hear another attendee ask the questions you were too afraid to ask. Getting feedback from someone else and hearing about their life experiences. Also, we can be of so much assistance to our communities whether it's one project or a few. With all of this technology, we have become a society that doesn't have the time. I know, I understand completely, I raised seven children. But with each other we can be a force for good. We can together do more than we ever can alone.

Explain LSI's significance. Invite someone to a conference when it's in your area. Explain the educational value for your career as well as your self-worth. Express that continuing education can make you more valuable with the CCLS programs, Legal Specialization Sections, and Legal Professional Training Seminars. It will let them know what we are about - Educating California's Legal Support Professionals.

It's a given, unfortunately, that there may be only a few individuals in each Association that work. Don't let that make you less accepting or inviting. Sometimes you have to adopt an attitude of what you want things to be not what they are. Keep up the good work. Fight the good fight. Come on, this could be the turning point in getting people more involved. So let's get them to join, pay their dues and now that you know, tell them and teach them what's next.

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Dates to Remember in 2017

November 6, 2017	Registration deadline for Legal Specialization Sections Seminars at Second Quarterly Conference
November 7, 2017	Registration deadline for CCLS Workshop at Second Quarterly Conference
November 10-12, 2017	LSI Second Quarterly Conference Lions Gate Hotel & McClellan Conference Center, McClellan, CA Hosted by Placer County LPA
November 13, 2017	Registration deadline for Overview of California State Court Discovery (online class)
December 1, 2017	Last day to submit articles for February 2018 issue of The Legal Secretary
December 22, 2017	Registration deadline for CCLS Online Study Group
January 3, 2018	Registration deadline for Beginning Legal Secretarial Training Online Class
January 7, 2018	CCLS Online Study Group begins
January 8, 2018	Beginning Legal Secretarial Training Online Class begins
January 17, 2018	Last day to submit CCLS Exam Application without late fee to the CCLS Certifying Board for March 17, 2018 exam
January 22, 2018	LSI Third Quarterly Conference registration due
February 17, 2018	Last day to submit CCLS Exam Application with late fee to the CCLS Certifying Board for March 17, 2018 exam
February 23-25, 2018	LSI Third Quarterly Conference Knott's Berry Farm Hotel, Buena Park, CA Hosted by Orange County LSA
March 17, 2018	CCLS Exam

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LOCAL ASSOCIATION (DO NOT ABBREVIATE): _____

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☐ GOVERNOR

☐ CCLS

☐ STATE CHAIRMAN: _____

☐ PLS

☐ OTHER _____

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POSTMARKED ON OR AFTER JANUARY 23, 2018 \$135.00 \$ _____

INDIVIDUAL TICKETS:

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GOVERNORS' LUNCHEON (SATURDAY) _____ @ \$25.00 \$ _____

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For Luncheons, Choose One:

☐ Hoagie Sandwich

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BANQUET (SATURDAY) Choose One: _____ @ \$55.00 \$ _____

☐ Mrs. Knott's Fried Chicken Dinner

☐ Sliced NY Strip Loin Dinner

BRUNCH (SUNDAY) _____ @ \$35.00 \$ _____

TOTAL AMOUNT PAID: _____ \$ _____

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FOR INFORMATION CONTACT:

CONFERENCE CHAIR – BARBARA BARREGAR; (949) 285-5271; OCLSA2018Conf@gmail.com

RESERVATION CHAIR – DEBORAH SCHMIDT, CCLS; (949) 432-6608; OCLSA2018Register@yahoo.com

Visit our Facebook Page for Conference Information and Updates at www.Facebook.com/OCLSA

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BROOKE MANSFIELD is a Life Member and Past President of LSI (2010-2012). She is also a member of Santa Clara County LPA. Brooke has worked in the legal field for over 20 years. She currently works as an Independent Contractor doing paralegal work for several probate and estate planning law firms. Brooke resides in Alturas (Modoc County) with her American Bulldog, Bocephus, a blue nose pit, Chloe, a Maltese, Dixie and two cats, Hemingway and Helenor. When she hits the lottery, she plans on spending weekends in Southern California with her two grand-kids, Sloane (7) and Clark (3).

Life After Serving LSI

BY BROOK MANSFIELD - SUBMITTED BY SANTA CLARA COUNTY LPA

There are plenty of articles in past issues of The Legal Secretary regarding running for office. There is plenty of advice available about serving your local association and serving as a chairman or officer, but not much is available about what happens AFTER you serve LSI, specifically, our LSI Past Presidents.

What is the role of an LSI Past President (“PP”)? There is nothing written in our Bylaws. We just kinda “wing it”! I followed the “normal” career path. I joined my local association, served on various committees and eventually served on my local board. After an unsuccessful attempt at running for LSI Treasurer, I was appointed a state chairmanship. I served as your LSI Legal Secretary Training/Seminar Chair. From there, I ran (again) for LSI Treasurer. If memory serves correctly, I ran three times before (finally) being elected! That process was a learning experience.

The typical progression of an LSI Officer is being elected Treasurer, then moving on to Executive Secretary, Vice President, and finally President. The most immediate PP serves as LSI’s Executive Advisor and is an appointed member of the Executive Committee (EC). The “old timers” will remember when we had a First and Second Vice President, making the commitment to LSI two additional years.

I served as your President from 2010-2012, and then had to take some time away from LSI. After dealing with a litany of personal issues, I decided recently to dip my toes into the conference pool once again. After my long absence, I attended the 2017 May Annual Conference in Modesto. It was great to see old faces and meet new legal professionals, but I felt lost. I had no meetings to attend, no Board of Governors’ (“BOG”) meeting to preside over. I actually got to sleep in and let my roommate get ready first in the morning!

This all leads me back to the big question, what is the role of an LSI Past President? We have been introduced down to a science! We have all perfected the “Princess

Wave.” I think the biggest role PPs have is that of cheerleader or ambassador. Dare I say role model and mentor? We have served in every capacity on the Executive Committee. We know how this corporation runs and our past triumphs and defeats. We are a treasure trove of knowledge and experience.

I will let you in on a secret - there was a time when I would attend conferences as a “civilian” and see all those PPs sitting in the back of the room together and think “Oh, good Lord, something is up.” Why would these ladies sit together during our Board of Governor’s meeting and not with their own association or friends? I’ll tell you! They are visiting, catching up on what’s going on with each other’s lives. Oh, and here is a shocker - they are paying attention to what is going on at the meetings. See, as PPs, we think of LSI as one of our children that we take care of during our tenure on the EC. Upon our “retirement” we are like empty-nesters. We may behave as “helicopter parents” at times. Please forgive us for this behavior. We are watching our baby grow-up and experience new things.

Past Presidents are in a unique position. We have served on each of the offices on the EC, we have held at least one state chairmanship, and we have served our local association. We don’t just see an EC Resume - we know that an all-day meeting is behind that. We know that our Executive Secretary finished that all-day EC meeting and hammered that EC Resume out before the Friday night reception. That Treasurer’s Report? We know what goes into getting that prepared. We see the LSI President running the BOG meeting so smoothly. We know the



stress and anxiety that goes along with being President. You may simply hear chairman after chairman give an oral report, but we beam with pride as we see our peers having stepped out of their comfort zone and accepted a position that they did not think they could do - or at least had some doubts.

I am sure I had a few audible eye rolls over the years as I saw a PP stand up at the microphone and ask a question on the EC Resume or make a motion or debate a motion that was on the floor. I didn't get it then, but I do now. If you see me walking up to the microphone, feel free to eye roll (I'll be listening). I will do it because I KNOW someone else in that room is thinking the same question and is too timid to say something. There have been some rather heated debates over the years and who wants to throw themselves into the fire by voicing what could be an unpopular opinion? Ask a PP to ask for you. I'll do it! I learned in my tenure on the EC not to be timid. It's okay to ask questions. It's okay to voice your opinion.

What ARE our duties as a PP? As I mentioned, we should be mentors to every member of LSI. This is not limited to officers and chairmen. This is to EVERY member of LSI.

You may find this hard to believe, but I was talking to a member at a conference years ago and she told me that she had been instructed "Do not talk to them unless they speak to you first." She asked me if this was true. I about died! NO! It's not true!! Is that how members look at us? Trouble makers who should not be spoken to unless we speak to you first? Yikes! Another memory is riding in the crowded elevator. An LSI member takes ahold of my name badge, reads it, and as she flicked it aside says "Oh - you're one of THOSE people." Conversation terminator. I don't recall how I replied. I'd like to think graciously.

PPs are available to talk any time over the phone and via emails. Time at conference is so hectic. We have our BOG meeting and LSS seminars to attend. We hardly have a minute to breathe. One solution would be to change our tradition at Sunday Brunch. Instead of having Past Presidents sitting at a reserved table, why not have Past Presidents sit at "regular" tables with the members? This would give members the opportunity to visit casually with a Past President.

Here is a little inside scoop on the reserved tables for our Past Presidents: We really don't hang out too much outside of conference. We are spread out up and down the state of California. When we attend conferences, it is one of the few times we have to catch up with each other. Somewhere along the way (well before I was a sparkle in my parents' eyes) someone decided that we should have a table to ourselves. This is dangerous if Christa and I attend the same conference. We've been known for some shenanigans and it's not likely to stop anytime soon. In Christa's absence, I've been recruiting Diana Estabrook in my capers. She doesn't need much encouragement! The table is up close so the current EC can keep tabs on us and to ensure we behave appropriately at banquet. (We like it when you buy us drinks, just sayin')

What about an additional luncheon moderated by PPs? Would you, the member, be receptive to this? This could create a budget fiasco since we've approved the current budget for our fiscal year. However, I believe costs would be minimal each quarter. It is something to look into if the interest is there.

My LSI career has been an interesting ride. There have been highs and lows. Good and Bad. At the end of the day, I'd do it again. I would have done a few things differently knowing then what I know now, but I enjoyed every minute of it.

Don't hesitate to take advantage of the vast knowledge of your Past Presidents. Conferences can be overwhelming if you have not attended one in the past, or you are still new to the routine. We have so many acronyms (LSI, LSS, EC, PRC, PP, and MAL). Not sure what the alphabet soup is all about? Ask a Past President. I think the resources of our PPs are being under-utilized. I realize that not all PPs can be at all conferences and some are retired from the legal field. I believe I can speak for the other PPs when I say that we deeply care about this corporation and would love the opportunity to help the members in some way. Need a sounding board? Need a mentor? Give me a call, or hit me up at a conference. And yes, you can speak to me before I speak to you first!

LS



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APPLICATION TO TAKE CCLS® EXAM

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

(Select one) ☐ **Northern California** ☐ **Saturday, March 17, 2018**
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- **Deadline:** Applications must be received **60 days** prior to the examination date.
- **Late Application:** Late Fees apply when Applications are received less than **60 days** (but not less than 30 days) prior to the examination date, and accepted only if space is available.
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Examination Fee*	100.00	Examination Fee*	100.00
Late Fee (if applicable)	30.00	Late Fee (if applicable)	30.00
TOTAL DUE w/o Late Fee:	\$125.00	TOTAL DUE w/o Late Fee:	\$175.00

Personal Information

Name: _____

Mailing Address: _____

Last 4 digits of SSN: _____ Email: _____

Phone (Day): _____ Phone (Evening): _____

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

Name of Local LSI Association: _____

Employment Information

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

Position: _____ Dates of Employment: _____

Employer: _____
(name and address)

Supervisor: _____ Supervisor's Phone: _____

Supervisor's Email: _____

Summary of Duties: _____

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

Date: _____

Applicant Signature _____

*Fees subject to change without notice.

Rev. February 2017



LEGAL SECRETARIES, INCORPORATED

CCLS ON-LINE STUDY GROUP

JANUARY 7, 2018 – MARCH 11, 2018



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.

***** NEW *****

Individual modules for each section of the CCLS Study Group are now 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)

Name: _____ Association: _____ LSA/LPA
Phone: _____ Email: _____

10-Week Study Group:

First time participation: _____ \$100 Members _____ \$150 Non-Member
Subsequent participation: _____ \$ 50 Members _____ \$ 75 Non-Members

Individual Modules: (\$15 each Members; \$25 each Non-Members)

_____ California Legal Procedure _____ Legal Terminology _____ Legal Computations
_____ Skills _____ Reasoning & Ethics
_____ Law Office Administration _____ Ability to Communicate Effectively

Payment: Check # _____ Credit Card # (Visa/MC only) _____
Expiration Date: _____ Sec. Code: _____

DEADLINE TO REGISTER IS DECEMBER 22, 2017. 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 (with credit card information). You may also pay via PayPal at www.lsi.org. **NO REFUNDS AFTER JANUARY 2, 2018.**

STRIVE FOR SUCCESS – BE A CCLS!



APRIL IGNAITIS, CCLS has worked in the civil litigation field for over 25 years. She received her designation as a CCLS in April of 2015. She graduated from DeAnza College, with a Paralegal degree (cum laude) in Paralegal studies and is currently employed in the San Jose office of Littler Mendelson, P.C. She joined Santa Clara County LPA in 2007 and currently serves as Santa Clara County LPA's Treasurer and Ways & Means Chair. She is also serves on the CCLS Certifying Board.



ELISE DRESSER, CCLS has been a member of the CCLS Certifying Board since 2010. She was the CCLS Certifying Board Chairman from 2014-2015 and is now serving a six-month term as CCLS Certifying Board Chairman.

RECERTIFICATION: Frequently Asked Questions

BY APRIL IGNAITIS, CCLS AND ELISE DRESSER, CCLS OF THE CCLS CERTIFYING BOARD

Congratulations to all the examinees who studied for and passed the California Certified Legal Secretary (CCLS) exam this year! If you are a new CCLS, or if you simply need a refresher course about recertification, here are some of the most frequently asked questions about recertifying. If your question is not answered below or you need further information on any subject, refer to the Standards for Recertification, which can be found on LSI's website, or contact the CCLS Certifying Board at cclscertifyingboard@gmail.com.

WHEN DO I HAVE TO RENEW?

Your Certification term is for a three-year period which expires on the date indicated on your notice of certification or recertification letter. If you are unsure when your term expires, please contact the CCLS Certifying Board Recertification Chair at cclsrecertification@gmail.com for clarification.

HOW MANY CREDIT HOURS DO I NEED?

You must complete 15 credit hours of approved continuing education during each recertification term. It is your responsibility to complete a Certificate of Attendance and submit it to the sponsor of the educational program for signature verifying your attendance at the program. Please keep in mind that you cannot sign your own Certificates of Attendance. For specific information on who is to sign your Certificates of Attendance, please refer to the Standards for Recertification. Also, credit hours in excess of 15 hours per certification term shall not be applied to a subsequent certification term.

For each hour of instruction received at an educational program approved by the CCLS Certifying Board, you will receive 1 credit hour. Educational courses more than 1 hour in duration shall qualify for matching credit hours. Pursuant to the Standards for Recertification, of the required 15 credit hours, no more than 6 credit hours will be allowed for education regarding administrative and/or

mechanical function as performed by legal support staff, and of those 6 hours, no more than 2 credit hours will be allowed for educational courses where the topics are not unique to work done by legal support staff. Approved programs must focus on the duties of legal support staff in order to receive credit. For specific information concerning qualifying credit hours, please refer to the Standards for Recertification.

WHAT TYPES OF PROGRAMS ARE ACCEPTABLE FOR CCLS CREDIT?

Approved providers are those providers which sponsor educational programs that may qualify for recertification credit. Not all educational programs sponsored by a particular approved provider will qualify for recertification credit, so if you have a question regarding a particular program, refer to the Standards for Recertification or contact the Certifying Board Chair or Recertification Chair for clarification. Approved provider status has been granted for the following educational programs:

Seminars and workshops (including online seminars, workshops, or study group sessions) sponsored by LSI, its affiliated associations, and its Legal Specialization Sections.

Seminars and workshops sponsored by The State Bar of California, its legal specialization sections, and any bar association in California.

RECERTIFICATION...

Course and educational programs granted MCLE status by The State Bar of California.

Courses and educational programs approved for Professional Legal Secretary (PLS) continuing education credit by NALS.

Other educational programs offered by organizations to which approved provider status has been granted by the CCLS Certifying Board.

DO WEBINARS AND ONLINE STUDY GROUPS QUALIFY FOR CCLS CREDIT?

Now that LSI (and other approved providers) have been offering more and more online webinars and online programs, such as Legal Secretarial Training and CCLS study groups, certification credit may be obtained through self-study by listening to or watching videotaped legal education courses approved by The State Bar of California for MCLE credit, including those sponsored by LSI and/or its affiliated member associations. Such credit hours shall not exceed 5 credit hours in any recertification period. A CCLS Certificate of Completion is required and is to be co-signed by the provider or your supervising attorney. (In the alternative, applicants may have their supervising attorney sign a CCLS Certificate of Attendance and attach it to the CCLS Certificate of Completion or MCLE Certificate.) If the provider does not offer a Certificate of Attendance, you may download the form from LSI's website.

CCLS recertification credit may be obtained by participating in a CCLS study group sponsored by LSI and/or its affiliated member associations. Credit hours for such study groups shall not exceed 10 credit hours (exclusive of independent study time) in any recertification period. Live participation shall be confirmed by the instructor. A certificate of participation completed by the study group instructor must be provided in order to claim credit hours.

CCLS recertification credit may be obtained by attending or participating in a webinar approved by The State Bar of California for MCLE credit, or any online workshop or seminar sponsored by LSI and/or its affiliated member associations. A CCLS Certificate of Completion is required to receive credit hours and is to be co-signed by the provider or your supervising attorney. (In the alternative, applicants may have their supervising attorney sign a CCLS Certificate of Attendance and attach it to the CCLS Certificate of Completion or MCLE Certificate.) Certain LSI-sponsored online workshops, seminars, and study groups may or may not qualify for MCLE credit and, if necessary, will be considered by the CCLS Certifying Board on a case-by-case basis.

DO I NEED TO KEEP THE PROGRAM HANDOUTS?

Yes. Pursuant to the Standards for Recertification, in order to qualify for recertification credit, any program, course of study, or class of more than one hour must have a substantive handout. The Recertification chair will most likely not request a copy of the handout if the program is at least one hour in duration and the title of the program is clear as to the subject matter. However, if the title of the program is questionable and is over several hours in duration, you may be asked to provide a copy of the handout.

I HAVE MY 15 CREDIT HOURS. HOW DO I RENEW MY CERTIFICATION?

Now that you have your 15 credit hours, you may submit your Application for Recertification on or before the date your certification term expires, in two ways:

Option 1: Submit your Application for Recertification and copies of your Certificates of Attendance and the requisite \$25 recertification fee* to the CCLS Certifying Board Recertification Chair, whose address can be found on the Application for Recertification, by U.S. regular mail.

Option 2: Submit your Application for Recertification and copies of your Certificates of Attendance electronically via PDF to the CCLS Certifying Board Recertification Chair at cclsrecertification@gmail.com along with the requisite \$25 recertification fee.*

***IMPORTANT:** If paying by check, please make it payable to "LSI." If paying by PayPal, the CCLS Certifying Board will send you a PayPal link.

Credit hours in excess of 15 hours per certification term shall not be applied to a subsequent certification term.

DO I NEED TO ADVISE THE CERTIFYING BOARD IF I MOVE, LEAVE THE LEGAL FIELD, OR RETIRE?

Yes! If your address changes, be it your email address, work address, or residence address, you need to notify the CCLS Certifying Board. While it is your responsibility to recertify before your recertification term expires, the Recertification Chair will send out courtesy reminders approximately 60 days before the Application for Recertification is due. If your contact information has changed during the preceding three years, the CCLS Certifying Board may not be able to find you!

Continued on page 29



KRISTI L. EDWARDS, CCLS has been a legal secretary for over 25 years. She is legal assistant and office manager for Froneberger & Leviloff in San Rafael. 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 second year as Parliamentarian. She is a member of the Marin County Bar Association in the non-attorney category. She and her husband of 43 years live in Novato and enjoy following the local Pacifics baseball team, the SF Giants, and Golden State Warriors.

History, Her-Story, Your Local Association's Story

BY KRISTI L. EDWARDS, CCLS, LSI PARLIAMENTARIAN

Although I consider myself a forward-looking person, I truly appreciate the history of our combined associations. I think it's awesome to be part of an organization in existence for over 75 years, and it's important to preserve and honor our heritage. Every other year, the Executive Advisor updates the History of LSI. It is posted on the website, under the Resources tab, in the Merchandise and Brochures section and can be downloaded for free. It's a very interesting read and I encourage you to check it out. But what about your local association's history?

If your association is lucky, you have had a series of historians who have created lovely history books for your presidents and, if those presidents have stayed in touch, you have a great resource for learning about your past. Those books have a record of officers and chairs, pictures of members, copies of newsletters, mementoes from conferences and local events. I really enjoyed viewing the books San Diego LSA exhibited at their 85th anniversary event last year. But, history books are bulky and can be hard to store, and as they are presented to presidents, they do not necessarily stay in an association's control.

Digital technology is a double-edged sword. It is possible to scan and save important documents online, but it would be tough to scan an entire history book. You still must consider proper storage for digital records and the continued ability to access that storage. With so much information existing only in an on-line format – think photographs or e-newsletters, for example – it takes an extra effort to produce a physical history book. Many associations don't even have a historian. Maintaining your history will continue to be challenging.

During my term as parliamentarian, I have been asked by two associations to help them find their charter. One



association needed it for IRS purposes, and the other association was opening a new bank account and their charter was requested during that process. The charter is issued by LSI to a local association upon their formation. It acknowledges the 'birth' of that association. It's a pretty important document that tends to go missing.

The requests sent me off on a scavenger hunt through the parliamentarian records. I've found no digital record of charters. The parliamentarian folders I inherited for each active association all begin in 1995 with a copy of a letter from then LSI Parliamentarian Sue Ellen Wagstaff returning each association's old file to them. Those

HISTORY, HER STORY...

returned files may have contained copies of charters, but my current files do not. Then, there was that skinny green folder with a roster of all the local associations that have ever existed and the clue on a yellow post-it note indicating the charters were kept at corporate office.

A search has ensued through the storage container at corporate office. With the help of LSI Administrator Kim Oreno and LSI Secretary Lynne Prescott, CCLS, I am making my way through boxes of files looking for those elusive charters. If I ever find them, you can be sure I will scan them and include those digital records in the Parliamentary files I pass on.

What other documents should your association have and how long should you keep them? These are other questions I have been asked during my parliamentary term. Bylaws and Standing Rules are a must and it's great if they show dates of amendment. Minutes of meetings should be retained permanently. Treasurer's reports should be kept for at least 7 years. Governor's reports from conferences and bulletins or newsletters could be great resources for

local history. Lists of past presidents, life and honorary members are important. Mt. Diablo LPA includes this list as a prelude to their standing rules – nice! Each association should determine a retention policy including which records to keep, a method of storage, and a schedule of destruction.

One of the associations mentioned above ultimately found their charter in an old history book. Hurray! I located a copy of the charter provided to Long Beach LSA, our oldest association, and attach it here for its historical significance. Do you know where your association's charter is? When Marin County LPA celebrated its 50th anniversary, we could not find our original charter and LSI graciously issued us a duplicate. It's nice, but not quite the same as having the original document. I can certainly issue a duplicate if your association cannot locate its charter.

LS

RECERTIFICATION...

Continued from page 27

If you move out of state, notify the CCLS Certifying Board so that a hold can be placed on your continuing education requirements. You cannot use the CCLS designation while you are out of state and not maintaining your educational requirements. If you return to California, you must notify the CCLS Certifying Board within 60 days of your return and then continue with your continuing education requirements.

If you leave the legal field, contact the CCLS Certifying Board so that your status can be changed to inactive and a hold put on your continuing education requirements. You will not be able to use your CCLS designation during this time. If you return to the legal field, you must notify the CCLS Certifying Board immediately and continue on with your educational requirements.

If you have retired from the legal profession, you must notify the CCLS Certifying Board. Upon retirement, you no longer need to obtain continuing educational credit, however, you may still continue to use the CCLS designation. If you return to work in the legal field and wish to reactivate your CCLS status, you must notify the

CCLS Certifying Board and continue with your educational requirements.

FINAL CHECKLIST

You're almost there! Your recertification packet should include: (1) Completed Application for Recertification (with current contact information); (2) check payable to "LSI" in the amount of \$25/or check off the box that you are requesting to pay via PayPal on the Application for Recertification; (3) copies of your signed Certificates of Attendance; and (4) a copy of any program handout, if applicable or requested, for any program over an hour in duration. You will receive confirmation of your recertification from the Recertification Chair.

If you follow these procedures, processing your recertification will go much smoother and you will be recertified for another three years. Again, if you have additional questions, please contact the CCLS Certifying Board or refer to the Standards for Recertification at www.lsi.org for updates.

LS

LEGAL SPECIALIZATION SECTIONS

2017-2018 Membership Form

MAY 1, 2017 - APRIL 30, 2018

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

JOIN OR RENEW AT WWW.LSI.ORG

PAY VIA CREDIT CARD OR PAYPAL

SECTIONS

(circle which sections you are joining)

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

LSI Member Rates:

Individual Section: \$20

All Six Sections: \$75

Non-LSI Member Rates:

Individual Section: \$40

All Six Sections: \$150

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

Name: _____

Email Address: _____

LSI Member, Local Association/MAL: _____

Legal Specialty(ies): _____

Counties/Courts: _____

Newsletters are emailed to members, if you would like to opt out, please email the LSS Coordinator.

Dawn R. Forgeur, CCLS
LSS Coordinator

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

E-mail: dawn.forgeur@stoel.com
www.lsi.org





BEGINNING LEGAL SECRETARIAL TRAINING CLASS

LSI will be offering its Beginning Legal Secretarial Training Class online. This class will be an eight-week, work-at-your-own-pace online session commencing January 8 and ending March 5, 2018. During the classes, the following topics will be covered:

Introduction to the Law Office
Duties of the Legal Secretary
Effective Telephone Skills
Effective Oral Communication Skills
Calendaring and Timetables
Basic Grammar Skills
Transcription and Proofreading Techniques
Court Structure
Citations

Service of Legal Documents
Preparing a Proper Caption
Preparation of Documents Filed with the Court
Basics of Civil Litigation Interrogatories
Demand for Production of Documents
Requests for Admissions
Depositions/Deposition Subpoenas
Demand for Physical Examinations
Discovery Timelines, Service and Verifications

CLASS SESSION OPENS ON MONDAY, JANUARY 8, 2018

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 cost of the training class, which includes the Legal Secretary's Reference Guide, is \$180 for LSI members/\$250 for non-LSI members. Each individual must register separately. Upon completion of the class, students will receive a certificate from LSI.

BEGINNING LEGAL SECRETARIAL TRAINING CLASS REGISTRATION

(Please type or print clearly)

Name: _____ Email: _____
Address: _____
City/Zip: _____ Telephone: _____

\$180 LSI Member _____ Association: _____ LSA/LPA
\$250 Non-LSI Member _____

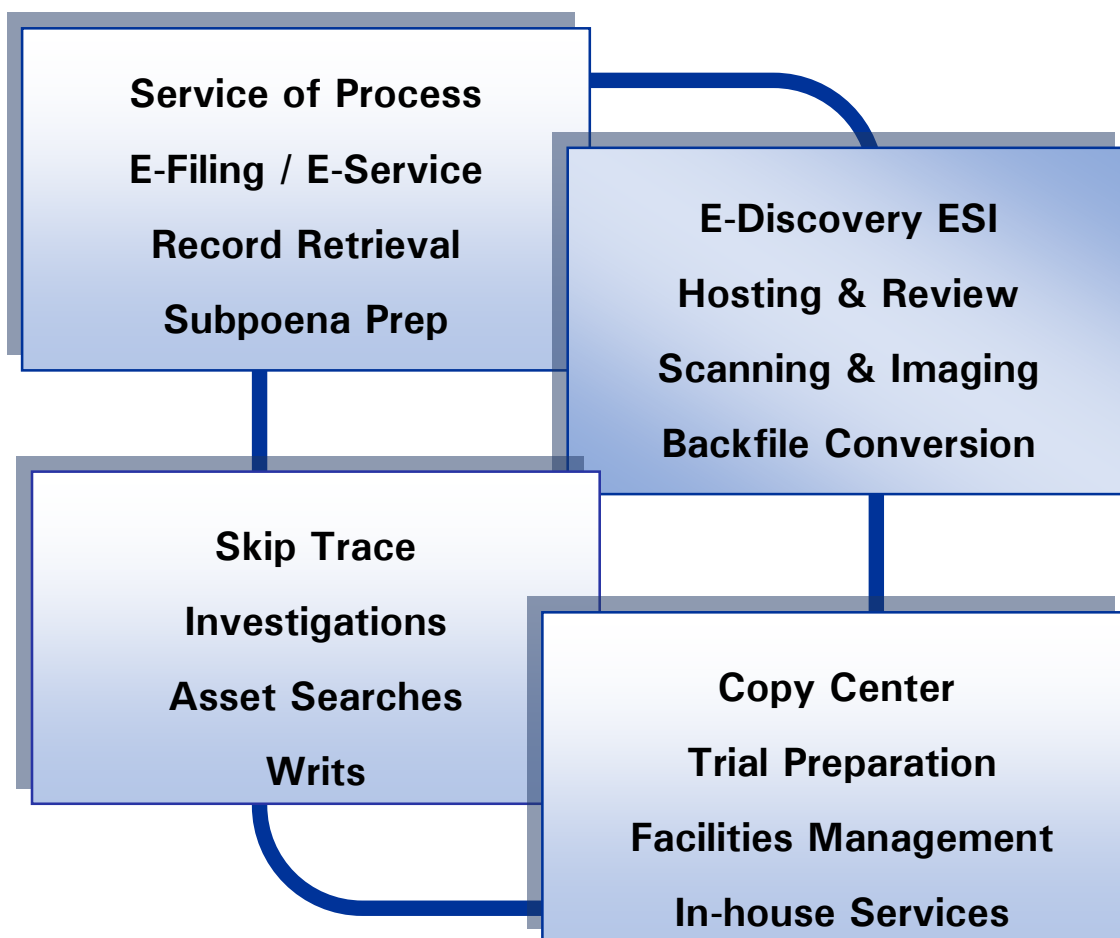
Payment: Check # _____ (made payable to LSI)
(Note: Checks must clear before books will be mailed and may cause a delay in access to the class.)
Name on Card: _____
Visa/MC Credit Card # _____
Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

Email registration form NO LATER THAN January 3, 2018, to LSI Legal Professional Training/ Seminar Chair, training@lsi.org or mail to LSI, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. Registration will also be offered online at www.lsi.org with PayPal. Keep in mind books will not be mailed until registration is processed. For further information or inquiries, email training@lsi.org. No refunds after January 8, 2018. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study.

LSI – Educating California's Legal Professionals



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OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY

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 March 19 and ending April 30, 2018. During the classes, the following topics will be covered:

Interrogatories
Demand for Production of Documents
Requests for Admissions
Depositions

Demand for Physical Examinations
Deposition Subpoenas
Discovery Timelines and Service
Verifications

CLASS SESSION OPENS MONDAY, MARCH 19, 2018

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.

OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY CLASS REGISTRATION

Name: _____ Email: _____
Address: _____
City/Zip: _____ Telephone: _____

\$30 LSI Member _____ Association: _____ LSA/LPA
(No abbreviations please; status is verified)

\$50 Non-LSI Member _____

Payment: Check # _____ (made payable to LSI)
Name on Card: _____
Visa/MC Credit Card # _____
Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

Email registration form NO LATER THAN March 14, 2018, to training@lsi.org or mail to LSI, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. Registration will also be offered online at www.lsi.org with PayPal. For further information or inquiries, email training@lsi.org. No refunds after March 19, 2018. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study.

LSI – Educating California's Legal Professionals

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>*NEW BENEFIT: LEGALSHIELD/IDSHIELD Contact: Courtney Coats, Independent Associate (925) 580-6446; coats8@legalshieldassociate.com 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>QUESTIONS AND CONCERNS CONTACT: Heather Edwards, LSI Vice President LSI Marketing Committee Coordinator (818) 482-7040 heatheredwardslsi@aol.com</p>
<p>WORKING ADVANTAGE Toll Free: (800) 565-3712 www.workingadvantage.com Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more. Member ID: Contact LSI Corporate Office, info@lsi.org, or LSI Vice President</p>	<p>HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com</p>
<p>FINANCIAL PROVIDERS</p>	
<p>CAPITAL INVESTMENT ADVISERS Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 www.ciadvisers.com Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>	<p>LEGACY WEALTH MANAGEMENT Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz Offering discounted John Hancock Long Term Care Insurance & Life Insurance, Annuities, Retirement, Investment & Estate Planning, Mutual Funds, & 401K</p>
<p>DAVID WHITE & ASSOCIATES Wealth Accumulation and Preservation 3150 Crow Canyon Place, Suite 2000 San Ramon, CA 94583 (800) 548-2671 Contact: Ryan Gonzales (ext. 2682), rgonzales@dwassociates.com, or Matt Kay (ext. 2628), mkay@dwassociates.com Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance</p>	<p>ATHLETES BUSINESS CONSULTANTS Jory Wolf, President/Founder 350 10TH Avenue, Suite 1000 San Diego, CA 92101 Office: (858)886-9842 Cell: (510)919-9062 jory@athletesbiz.com California Insurance License: 0E88330 10% discount on Long Term Care, call for information on life, long term, and disability insurance, as well as commercial and residential lending</p>
<p>CREDIT UNIONS</p>	
<p>LA FINANCIAL FEDERAL CREDIT UNION P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p>PROVIDENT CREDIT UNION 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 www.providentcu.org All LSI members are eligible to join.</p>

LSI VENDOR RECOGNITION

LSI would like to extend its thanks and appreciation and acknowledge every one that supported our local associations at LSI's 2017 First Quarterly Conference. Your support is very important to our organization.



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Judy Barsuglia – Gifts Galore

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Rebecca Harper – Shaklee Distributors

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Busy lawyers rely on their staff to handle many details of their practice. They look to you, as a professional, to know what to do, and when and how to do it. The **Legal Professional's Handbook** provides you with the answers ...just as it has for over 75 years! Each chapter contains detailed practice forms and step-by-step instructions covering every major area of California law practice. The Handbook is an invaluable resource to add to your entire reference library!

LSI MEMBERS-ONLY PRICE\$331.80
Nonmembers Price.....\$474

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by replacement pages.*

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This Manual contains detailed practice forms for every major area of law practice, along with step-by-step instructions for completing them. This is a "must-have" forms guide for legal secretaries, paralegals and new lawyers; and it's a great resource for training your office staff. In fact, the Manual is frequently used in schools, workshops and legal secretaries classes. You'll also find handy miscellaneous aids, such as procedural checklists and guidelines, tips on transcription and proofreading, law office abbreviations and legal terminology, and a list of useful reference books.

LSI Members-Only Price.....\$182.70
Nonmembers Price.....\$261

*Price includes shipping. Add applicable sales tax.
This title is updated bi-annually for subscribers
by replacement pages.*

Buy both LSI books together and get a discount!
Combo price for both books.....\$514.50
Price includes shipping. Add applicable sales tax.

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Looking to Contribute an Article?

LSI is always looking for articles geared toward the legal community.

If you are interested, please contact:

Editor, *The Legal Secretary*

Barbara Barregar at LSI.TLSeditor@gmail.com

Quarterly Assignments

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

- **AUGUST ISSUE (to be submitted no later than **June 1st**):**
Alameda County, Beverly Hills/Century City, Conejo Valley, Contra Costa County, Desert Palm, El Dorado County, Fresno County, Humboldt County, Imperial County
- **NOVEMBER ISSUE (to be submitted no later than **September 1st**):**
Livermore-Amador Valley, Long Beach, Los Angeles, Marin County, Merced County, Mt. Diablo, Napa County, Orange County, Placer County
- **FEBRUARY ISSUE (to be submitted no later than **December 1st**):**
Rio Hondo District, Riverside, Sacramento, San Diego, San Fernando Valley, San Francisco, San Gabriel Valley, San Mateo County, Santa Barbara
- **MAY ISSUE (to be submitted no later than **March 1st**):**
Santa Clara County, Santa Cruz County, Santa Maria, Sonoma County, Southern Butte County, Stanislaus County, Stockton-San Joaquin County, Trinity County, Ventura County

LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	QUANTITY	UNIT PRICE	TOTAL
BRASS TACKS* A guide instructing local officers and chairmen on how to perform their respective duties. Contains check lists, calendars and forms.(no charge for pdf download @ www.lsi.org)		5.00	
CCLS BROCHURE Tri-fold brochure promoting the benefits of taking the CCLS Exam.		N/C	
CCLS STUDY GUIDE Sample questions and answers to assist in preparing for all sections of the CCLS Exam.		25.00	
CCLS STUDY KIT SECTIONS All sections include suggested 10 and 18 week syllabi.			
CALIFORNIA LEGAL PROCEDURE (CLP) CLP section of the CCLS study Guide, CLP Worksheets, CLP Study Tips, list of additional references required for CLP		30.00	
LEGAL TERMINOLOGY (LT) California Style Manual (book included with section), LT section of CCLS Study Guide, LT worksheets, LT study tips, list of additional references required for LT		50.00	
LEGAL COMPUTATIONS (LC) LC section of CCLS Study Guide, LC Worksheets, LC Study Tips, List of additional references required for LC		30.00	
SKILLS (SK) SK Section of CCLS Study Guide, SK Worksheets, SK study tips, list of additional references required for SK		30.00	
ABILITY TO COMMUNICATE EFFECTIVELY (ACE) Gregg Reference Manual, 11 th ed. (book included with section), ACE section of CCLS Study Guide, ACE worksheets, ACE study tips, list of additional references required for ACE		199.00	
LAW OFFICE ADMINISTRATION (LOA)** <i>Pocket Guide to Legal Ethics</i> (book included with section), Secretary of State Notary Public Handbook, LOA section of CCLS Study Guide, LOA worksheets, LOA study tips, list of additional references required for LOA		70.00	
REASONING & ETHICS (R&E)** <i>Pocket Guide to Legal Ethics</i> (book included with section), California Rules of Professional Conduct, Secretary of State Notary Public Handbook, R&E section of CCLS Study Guide, R&E worksheets, R&E study tips, list of additional references required for R&E		70.00	
** If LOA and R&E are purchased as individual sections at the same time, there is a \$40.00 discount because the same reference book is included in both sections.			
COMPLETE CCLS STUDY KIT (ALL 7 SECTIONS)		199.00	
GUIDELINES FOR HOSTING LSI CONFERENCES* An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI Conference.		N/C	
GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM A 34-page guide, with sample forms, to assist with the planning and execution of a successful legal educational program.		5.00	
HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND GUIDELINES* A booklet with step-by-step directions, including rules and examples, for preparing a History Book for entry in the LSI History Book Competition. Created for local association historians and/or presidents.		5.00	
HISTORY OF LEGAL SECRETARIES INCORPORATED A 50-page memory of people, places and events since 1929.		5.00	
LAW OFFICE PROCEDURES MANUAL FLYER An 8 ½" x 11" advertisement of the LOPM. Includes listing of contents and Order Form.		N/C	
LAW OFFICE PROCEDURES MANUAL INSTRUCTOR'S GUIDES To assist instructors in conducting training classes. Teacher Training Chapter offers tips for teaching. Other Guides supplement Chapters of the LOPM and contain projects, instructions to student, completed and blank legal forms, exams and answer keys.	ALL	\$65.00	
TEACHER TRAINING CHAPTER (Rev. 5/2015)		4.00	
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LEGAL SECRETARY'S REFERENCE GUIDE A legal procedure guide designed to assist local associations in conducting a training class. Also useful for training office personnel and as a general reference for experienced staff.		30.00	

LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	QUANTITY	UNIT PRICE	TOTAL
LSI BYLAWS AND STANDING RULES* As currently adopted by the LSI Governors.		5.00	
LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER An 8 1/2" x 11" advertisement of the LPH. Includes listing of contents and Order Form.		N/C	
LSI LEGAL SPECIALIZATION SECTIONS BROCHURE Lists Sections offered and reasons for joining. Includes Section Membership Application.		N/C	
LSI MEMBERSHIP BROCHURE Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application.		N/C	
LSI ROSTER* Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.		N/C	
NEW MEMBER PACKET* A 2-pocket folder containing letter from LSI President, LSI membership information, Specialization Sections Membership Application, list of benefits and providers, CCLS information, Legal Professional's and Law Office Procedures Manual flyer and Code of Ethics. Local associations may insert additional material. For new local association members only.		N/C	
CCLS PIN A 1/2" high, 10-karat gold filled pin with CCLS logo. For the CCLS.		35.00	
LSI MEMBERSHIP PIN* A 3/4" high oval gold-tone pin with blue and white enamel overlay. LSI logo in center and "Legal Secretaries, Incorporated" inscribed on circumference. For all LSI members.		5.00	
LSI GOVERNOR'S PIN* A 3/4" high round gold-tone pin with white enamel overlay. LSI logo in center and "LSI Governor" inscribed in circumference. For local association Governors. Pin back.		10.00	
PRESIDENT'S PIN* Same as pendant (see above).		7.00	
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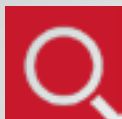
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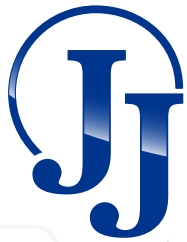


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