

**OFFICIAL NOTICE**

**February 2024, Third Quarterly Conference  
Legal Professionals, Incorporated**

TO: Governors, LPI Officers, LPI Committee Chairs, Members-at-Large, LSI/LPI Past Presidents, and LPI Honorary Members

The Third Quarterly Conference and Board of Governors Meeting of LEGAL PROFESSIONALS, INCORPORATED, will be hosted by Legal Professionals Incorporated and Mt. Diablo LPA from February 16, 2024, through February 18, 2024, in Walnut Creek, California.

**HEADQUARTERS:** Embassy Suites by Hilton  
1345 Treat Blvd.  
Walnut Creek, CA 94597  
(925) 934-2500 Telephone

**HOTEL RESERVATIONS:** By Phone: 1-800-HILTONS  
Online: [Hotel Reservation](#)

**ROOM DEPOSIT REQUIRED:** None

**DEADLINE FOR HOTEL RESERVATIONS:** January 16, 2024  
(no room rate guarantee after this date)

**RATES:** \$175.00 per night (single/double)  
Tax and Fees for room rates are \$23.10 (13.2%) per room  
per night = \$198.10 per night

**PARKING CHARGE PER DAY:** \$24.00 per day.

**CHECK-IN / CHECK-OUT:** Check-in time is 4:00 p.m.; Check-out time is 11:00 a.m.

**HOTEL AMENITIES:** Free WIFI, Fitness Center, Business Center, Indoor Pool, On-Site Dining and Room Service.

Rooms include coffee makers and mini refrigerators.

**ON-SITE DINING OPTIONS:** Embassy Grill and Embassy Lounge, as well as Room Service.

**NEAREST AIRPORTS:** Oakland International Airport (OAK)  
San Francisco International Airport (SFO).

This Conference has not been designated as a remote location. The preferred mode of transportation from airport to hotel is BART or Lyft/Uber.

**SCRIP TICKET:** \$ 236 (includes registration, Friday Night Social Event, Saturday Roundtable Luncheon, and Saturday banquet; \$246 after January 18, 2024)

The Friday Night Event will be Legal Trivia and a Nacho Bar

Individual tickets may be purchased as follows:

|                             |           |
|-----------------------------|-----------|
| Registration:               | \$ 30.00  |
| Registration after 1/18/24: | \$ 40.00  |
| *Roundtable Luncheon:       | \$ 66.00  |
| **Banquet:                  | \$ 105.00 |

**Please note that a full complimentary breakfast buffet is available each day for registered hotel guests.**

\*Registration is required to attend the Roundtable Luncheon.

\*\*Registration is not required to attend this function.

All online registrations include a \$5.00 convenience fee.

January 18, 2024

**DEADLINE FOR  
REGISTRATION:**

**NO REFUNDS AFTER:**

5 pm on January 18, 2024

**REGISTRATION  
INFORMATION:**

Registration and payment are available online at: [Conference Registration](#)

**TRANSPORTATION**

**There is no hotel shuttle, however BART, Uber and Lift are available. Please consider sharing a ride from the airport.**

**Flying:**

Oakland International Airport (OAK) is 25 miles and a 30-minute drive from Embassy Suites by Hilton Walnut Creek, California.

San Francisco International Airport (SFO) is 38 miles and a 45-minute drive from Embassy Suites by Hilton Walnut Creek, California.

## Schedule of Events for February Quarterly Conference

| <b>Thursday, February 15, 2024</b> |  |                             |
|------------------------------------|--|-----------------------------|
| <b>Time</b>                        | <b>Event</b>   | <b>Location/Notes</b>       |
| Noon – 5:00 PM                     | Budget Meeting<br>Members of the EC ONLY   | Mt. Diablo Boardroom        |
| <b>Friday, February 16, 2024</b>   |  |                             |
| <b>Time</b>                        | <b>Event</b>   | <b>Location/Notes</b>       |
| 8:30 AM – 12:00 PM                 | Executive Committee Meeting  | Mt. Diablo Boardroom        |
| 8:30 AM – 12:00 PM                 | Education Council Meeting  | Contra Costa Ballroom       |
| 9:30 AM – 12:00 PM                 | Publications Revision<br>Committee Meeting   | Black Diamond               |
| 1:30 PM – 5:00 PM                  | Joint Leadership Meeting   | Contra Costa Ballroom       |
| 1:00 PM – 5:00 PM                  | Registration   | Contra Costa Ballroom Foyer |
| 5:00 PM – 7:00 PM                  | Exhibitors   | Alameda Ballroom            |
| 6:00 PM – 7:00 PM                  | Welcome Reception  | Alameda Ballroom            |
| 7:00 PM – 9:00 PM                  | Legal Trivia and Nacho Bar   | Contra Costa Ballroom       |
| <b>Saturday, February 17, 2024</b> |  |                             |
| <b>Time</b>                        | <b>Event</b>   | <b>Location/Notes</b>       |
| 6:15 AM – 6:45 AM                  | Group Walk (Optional)  | Hotel Lobby                 |
| 8:00 AM – 3:00 PM                  | Registration   | Contra Costa Ballroom Foyer |
| 8:00 AM – 3:00 PM                  | Exhibitors   | Alameda Ballroom            |
| 9:00 AM – 10:30 PM                 | Board of Governors Meeting<br>(First Session)  | Contra Costa Ballroom       |
| 11:00 AM – 12:00 PM                | <b>Continuing Education Committee Seminar</b><br><br>“Making Appeals Happen”<br>Speaker: James M. Wagstaffe, Esq.,<br>Wagstaffe, von Loewenfeldt, Busch<br>& Radwick LLP | Black Diamond               |
|                                    |  |                             |

|                                  |  |                                   |
|----------------------------------|--|-----------------------------------|
| 11 AM – 12:00 PM                 | <b>Continuing Education Committee Seminar</b><br>“Effective Representations Requires Effective Communication”<br>Speaker: Vivian Shreve, CCLS, LPI<br>California Certified Legal Secretary Chair | Grizzly Peak                      |
| 12:15 PM – 1:15 PM               | Roundtable Luncheon and EC Resume Discussion<br>(doors open at 12:00)  | Contra Costa Ballroom             |
| 1:45 PM – 2:45 PM                | <b>Continuing Education Committee Seminar</b><br>“An Introduction to the Wonderful World of Trust”<br>Speaker: Nathan Borris, Esq.,<br>Johnston, Kinney & Zulaica LLP                            | Black Diamond                     |
| 1:45 PM – 4:00 PM                | <b>Legal Technology Training Seminar</b><br>“Briefing Cases 101”<br>Speaker: Bethany S. Ensz, M.S.   | Grizzly Peak                      |
| 3:15 PM – 4:15 PM                | <b>Continuing Education Committee Seminar</b><br>“Family Law: Declaration of Disclosures”<br>Speaker: Stan Sarkisov, Esq.,<br>Johnston, Kinney & Zulaica LLP                                     | Black Diamond                     |
| 6:00 PM – 6:30 PM                | Pre-Banquet Reception  | Contra Costa Ballroom or Atrium A |
| 6:30 PM – 8:30 PM                | Banquet  | Contra Costa Ballroom             |
| 8:30 PM – 10:00 PM               | Music/Dancing and Networking<br>(Toast Hosting Association)  | Contra Costa Ballroom             |
| <b>Sunday, February 18, 2024</b> |  |                                   |
| <b>Time</b>                      | <b>Event</b>   | <b>Location/Notes</b>             |
| 9:00 AM – 10:30 AM               | Board of Governors Meeting<br>(Second Session)   | Contra Costa Ballroom             |

**GENERAL CONFERENCE CHAIR**

Rod Cardinale, Jr. (408) 461-0972  
LPI President  
President@legalprofessionalsinc.org  
Carolina Ramos, CCLS (510) 314-9211  
Mt. Diablo President  
ramos\_caro@yahoo.com

**REPORTS OF OFFICERS AND CHAIRS**

**All** officers and chairs **must** submit a written report for this meeting. E-mail your report in MS Word format to LPI Administrator Kim Oreno, CAE, and LPI President Rod Cardinale, Jr., by **Wednesday, January 25, 2024.**

**OFFICIAL CALL TO LPI OFFICERS AND CHAIRS**

**DETERMINATION OF QUORUM**

In order to determine whether a quorum will be present at the meeting, each Governor must advise the LPI Executive Secretary in writing or by e-mail whether the local association will be represented by a Governor or Governor Pro Tem.

**OFFICERS AND CHAIRS OFFICIALLY CALLED**

**Only the four elected officers are required to give an oral report.**  
**If any, appointed Officer or Chair wants to give an oral report,**  
**please advise the LPI President on or before February 1, 2024.**

Third Quarterly Conference – February 16-18, 2024 – Walnut Creek, California

All Elected and Appointed Officers  
All Members of the Education Council  
All Members of the Marketing Committee  
Editor of the LPOM  
Editor of the LPH

Submit Expense Claims to LPI Treasurer, Erika Garduño  
([treasurer@legalprofessionalsinc.org](mailto:treasurer@legalprofessionalsinc.org)) no later than **Thursday, February 1, 2024.**

Dated: January 10, 2024

*Bettina Jacobson*

Bettina Jacobson, LPI Executive Secretary