



# LPI

*Educating California's  
Legal Support Professionals*

**LEGAL PROFESSIONALS,  
INCORPORATED**

**2023**

## **Course Catalog**

**WWW.LEGALPROFESSIONALSINC.ORG**

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# Welcome to LPI University

Thank you for your interest in Legal Professionals, Incorporated's ("LPI") training courses. We categorize our multi-week study courses under the name "LPI University," as each course uses a textbook, requires the submission of homework, taking quizzes, and the completion of a final examination.

Some courses are administered in real time, via Zoom; others are offered in an online, study-at-your-own-pace platform. Students who successfully pass the multi-week courses are provided with a certificate of completion. Courses are offered at the beginning, intermediate, and advanced levels.

The courses are challenging and fast-paced. It is recommended that you try to devote at least 4-5 hours each week outside of class for studying, reading, and completion of assignments/quizzes. Our goal is to make sure that at the end of the course you have an expanded understanding of court practices, legal procedures, and have built upon the skills and training you already possess.

## **ROLL CALL & ATTENDANCE**

Some courses have a roll call requirement, other classes are work-at-your-own-pace. Be sure you understand what the attendance requirements are for your specific course, as well as any makeup work policies.

## **TEXTBOOKS/CURRICULUM**

Certain courses will use a textbook as the curriculum, while others will use a reference guide. Regardless of which is used, these materials are included in the registration fee for the course.

## **HANDOUTS**

There will be handouts provided throughout the courses that correspond to the individual classes and topics. You may want to keep a separate file or binder for these handouts. Certain instructors may also provide a copy of the lesson or a PDF of the PowerPoint slides from each class.

## **HOMEWORK/LAB ASSIGNMENTS/QUIZZES/EXAMS**

Each course has its own requirements for homework, assignments, and quizzes. A summary of all courses is listed in this catalog and states whether the course includes quizzes, assignments, exams, etc.

## **MANDATORY EQUIPMENT/TECHNOLOGY**

It is VERY IMPORTANT that you have access to the internet, a reliable Wi-Fi connection, a computer with webcam, mic, and printer, as well as experience working with PDF documents, scanning/converting to PDF, etc.

Some courses will be held virtually via Zoom, in real time; therefore, you should have the capability to use this platform in order to attend the classes. Other classes will use a different platform, which will be made accessible to you in order to attend the classes.

## **INSTRUCTORS/HELP OUTSIDE OF CLASS**

The instructors are very generous with their time and will usually provide contact information to reach them outside of class hours. Certain courses offer "office hours" before and after each class specifically for the student to ask questions and seek help.

## **LEGAL TECHNOLOGY AND LEGAL RESEARCH/WRITING CLASSES**

These classes are typically not multi-week courses, rather they are stand-alone classes offered throughout the year.

# YOUR COURSE TUITION INCLUDES

- Textbook (if applicable) or Reference Guide
- Handouts
- Access to Required or Ancillary Software Platforms
- Membership in Legal Professionals, Incorporated (where applicable)
- Discounts on All LPI Educational Events, Conferences, and Publications\*
- Subscription to *The Legal Professional Magazine*\*



*\*Included with LPI Membership (where applicable)*





LEGAL PROFESSIONALS, INCORPORATED

# OUR PROMISE TO YOU

- Instruction designed to meet the needs and challenges of today's legal professionals.
- Relevant resources and educational curriculum developed by legal support professionals FOR the legal support professional.
- Hands-on application of learned skills and principles.
- Courses taught by industry professionals actively working in the legal field.
- Interactive workplace scenarios and problem-solving exercises.
- Enhanced comprehension of the role and value of the legal support professional.
- Reinforcement of the highest ethical standards and rules of professional conduct.

# MINIMUM COURSE REQUIREMENTS

LPI's educational track consists of online courses and classes with general and specific requirements for equipment, software, and other technical applications. Below is a minimum list of requirements, as well as a few recommended resources:

- ✓ A valid email address, mailing address, and telephone number.
- ✓ Internet access, Wi-Fi, webcam, and microphone capability.
- ✓ Microsoft Office (Word, Excel, etc.) Applications, Adobe Acrobat or equivalent PDF program.
- ✓ *Additional Recommended Resources:*
  - California Style Manual (4th Ed.)
  - Bryan A. Garner's Redbook: A Manual on Legal Style (4th Ed.)



Adobe



## INSTRUCTION TEAM



**Vanessa  
Buffington**

Vanessa Buffington is the owner of NextGen Legal, offering paralegal assistance and legal staff training services to law firms throughout the San Francisco Bay Area. She has been part of LPI's instruction team since 2017. Vanessa is the instructor for the following courses:

- Beginning Legal Secretarial Training
- Overview of California State Discovery
- Trial Preparation
- Advanced Discovery
- Appellate/Federal Procedure



**June Hunter**

June Hunter is a Technical Enablement Senior Specialist with CS DISCO, as well as an adjunct instructor for U.C. San Diego Extension's ABA-Approved Paralegal Studies Program. She has been LPI's Legal Technology Trainer since 2021.

June's technology training includes classes covering:

Microsoft Word	Microsoft Outlook
Microsoft PowerPoint	Microsoft Excel
Adobe	Best Authority
Electronically Stored Info	Tips and Tricks



**Lynne Prescott,  
CCLS**

Lynne Prescott, CCLS, is the Executive Advisor for LPI, and has been a legal professional for nearly 40 years. She is a writer, speaker, and experienced trainer. She has taught beginning level courses at the local association level for many years, and is the instructor for the following courses:

- Intermediate Legal Professionals Training
- Advanced Legal Professionals Training



**Bethany Ensz**

Bethany S. Ensz, M.S., works as a Legal Research and Analysis instructor at UCSD Division of Extended Studies. Bethany is the newest member of LPI's instructor team, teaching legal research and writing. Before teaching, she worked as a corporate paralegal and office manager for Breakwater Law Group, LLP.

Prior to joining Breakwater, she worked with Sheppard, Mullin, et al., and began her legal career with McKenna Long & Aldridge LLP (now Dentons). Bethany has a BS in Criminal Justice from Indiana University and a minor in Psychology, and earned a Masters degree in Legal Studies from the University of San Diego School of Law. She earned her paralegal certification from UCSD Division of Extended Studies, where she was inducted into the LEX Honor Society.

## INSTRUCTION TEAM



Vivian  
Shreve, CCLS

Vivian Shreve, CCLS, has been a legal secretary/assistant for more than 40 years and has been an Executive Assistant at Wilson Sonsini Goodrich & Rosato in Palo Alto since 2008. She currently serves as LPI's CCLS Chair and is the immediate past Chair of the California Certified Legal Secretary Certifying Board.

Vivian currently teaches the CCLS Online Study Group, helping examinees prepare for the CCLS Exam.

"Legal Support Staff,  
Attorneys, Office  
Managers . . . It Doesn't  
Matter.  
We All Play On the Same  
Team - - We Are All  
Partners in the Same  
Profession."

*Lynne Prescott, CCLS*



# COURSE/CLASS SCHEDULES

Please check LPI's website ([www.legalprofessionalsinc.org](http://www.legalprofessionalsinc.org)) for the schedule of events, classes, webinars, and multi-week courses, as new events are constantly being added to the schedule.

All events are subject to instructor availability and subject to change.



# COURSE DESCRIPTIONS

## BEGINNING LEGAL PROFESSIONALS TRAINING COURSE (ONLINE)

An eight-week, work-at-your-own-pace online course. Topics to be covered include:

- Introduction to the Law Office
- Duties of the Legal Secretary
- Effective Telephone Skills
- Effective Oral Communication Skills
- Effective Written 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
- Demand for Production of Documents
- Request for Admissions
- Depositions/Deposition Subpoenas
- Demand for Physical Examinations
- Discovery Timelines, Service, and Verifications



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 course.

Required Textbook for This Course: *The Legal Secretary's Reference Guide (included in the cost of the course)*

Upon successful completion of the course, students will receive a certificate from LPI.

*Instructor: Vanessa Buffington*

## OVERVIEW OF CALIFORNIA STATE DISCOVERY COURSE (ONLINE)

A six-week, work-at-your-own-pace online course, covering the following topics:

- Interrogatories
- Demand for Production of Documents
- Requests for Admissions
- Depositions
- Demand for Physical Examinations
- Deposition Subpoenas
- Discovery Timelines and Service
- Verifications



The modules for this course will be taken from the Beginning Legal Professionals Training course for people that have worked in a law office but are new to civil discovery.

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 course is designed for legal secretaries and those studying for the California Certified Legal Secretary examination.

Textbook: Resource Guide Provided by the Instructor

Upon successful completion of the course, students will receive a certificate of completion from LPI.

*Instructor: Vanessa Buffington*



## CALIFORNIA CERTIFIED LEGAL SECRETARY ONLINE STUDY GROUP

*A ten-week study course designed to prepare examinees to take the California Certified Legal Secretary examination.*

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

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

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

Students will be provided with homework and handouts. Students now have the option of including the Law Office Procedures Manual when registering. The other study materials (available on Amazon.com) are required by NO LATER THAN the start of the class:

The California Style Manual (4th Ed.)

The Redbook by Bryan A. Garner (4th Ed.)

Pocket Guide to Legal Ethics

Students are also encouraged to have the CCLS Study Guide (available on the LPI website).

**\*\*REGISTRATION MUST BE RECEIVED TIMELY IN ORDER TO RECEIVE THE LAW OFFICE PROCEDURES MANUAL PRIOR TO THE START OF THE CLASS**

Individual Modules:

California Legal Procedure

Legal Terminology

Legal Computations

Skills

Reasoning & Ethics

Law Office Administration

Ability to Communicate Effectively



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

*Instructor: Vivian Shreve, CCLS*



## TRIAL PREPARATION COURSE (ONLINE)

An eight-week, work-at-your-own-pace online course. Classes will take place online utilizing video lectures, discussion boards, email, live Q&A sessions and quizzes. Login information will be provided the day before the class is scheduled to begin. Some of the topics that will be covered include:

- Pretrial Procedures
- Trial Subpoenas
- Expert Discovery
- Non-Expert Discovery
- Organizing Trial material and Files
- Computers and Technology
- Calendaring Deadlines
- Issue Outline
- Trial Notebook
- Witness List
- Witness Binders
- Impeachment Evidence
- Trial Exhibits and Exhibit Binders
- Trial Brief
- Voir Dire
- Motions in Limine
- Verdict Forms
- Jury Instructions
- Jury Selection
- Opening Statement
- Closing Statement
- Bench Trials



### **Required Textbook:**

Trial Preparation Reference Guide (included in cost of the course).

Upon successful completion of the course, students will receive a certificate from LPI.

*Instructor: Vanessa Buffington*

## INTERMEDIATE LEGAL PROFESSIONALS TRAINING COURSE (ONLINE)

This 15-week online training course is offered as a next step for those who have completed LPI's Online Beginning Legal Professionals Training Course, as well as for those who have a basic foundation as a legal support professional but wish to take their training and career to the next level.

Each course will be a live, real-time, interactive course conducted via Zoom. Students will have in-class group labs via breakout rooms, as well as outside class assignments. Weekly quizzes and the final exam will be administered via Google Forms. Google Suites (available on most mobile devices and desktop) will be used for the course. A Google email account will need to be set up before the course begins. Webcam and mic capability will be needed for this course.

Each individual must register separately. Upon completion of the course, students will receive a certificate from LPI.

### **Required Textbook:**

*The Law Office Procedures Manual* will be used as the textbook for this course and is included with the cost of the course (for the entire course and civil module only).



At the end of the course, students who successfully pass will receive a certificate of completion. Classes will be recorded for further review before the final exam.

A discounted rate can be arranged for firms or offices that wish to enroll a group of students.

### WEEK 1 - ORIENTATION

Training on Zoom, Google Suites and Slack platforms; overview of course.

### WEEK 2 - INTERMEDIATE DOCKETING/CALENDARING (Civil Module)

State Court vs. Federal Court; Electronic Calendaring Programs; Manual Calendaring; Master Calendar.

### WEEK 3 - INTERMEDIATE CIVIL LITIGATION, PART 1 (Civil Module)

Complaints/Cross-Complaints/Petitions; Service of Process; Ex Parte Proceedings; Case Management Conferences; Settlement Conferences.

### WEEK 4 - INTERMEDIATE CIVIL LITIGATION, PART 2 (Civil Module)

Answers/Demurrers; Motions to Dismiss/Strike/Quash; Meet and Confer; Default Proceedings; Alternative Dispute Resolution.

## LEGAL PROFESSIONALS, INCORPORATED

### WEEK 5 - INTERMEDIATE DISCOVERY (Civil Module)

Depositions; Discovery Shells; Motions to Compel, Best Practices.

### WEEK 6 - INTERMEDIATE SUBPOENAS (Civil Module)

State and Federal Court Subpoenas; Subpoena Practice.

### WEEK 7 - INTERMEDIATE MOTION PRACTICE (Civil Module)

Components of Effective Motions.

### WEEK 8 - INTERMEDIATE CITATIONS (Civil Module)

Styles; State Court vs. Federal Court; Marking Citations; Table of Contents; Table of Authorities.

### WEEK 9 - INTERMEDIATE FAMILY LAW

Petitions; Financial Disclosure; Discovery; Motions for Summary Judgment/Adjudications; Request for Family Law Orders/Modifications; Arbitration/Mediation.

### WEEK 10 - INTERMEDIATE PROBATE

Components of Probate Practice.

### WEEK 11 - INTERMEDIATE ESTATE PLANNING

Components of Estate Planning.

### WEEK 12 - INTERMEDIATE CORPORATE AND TRANSACTIONAL LAW

Corporation Start-Ups; Dissolutions; Maintenance of Corporations; Real Estate Law; Unlawful Detainer.

### WEEK 13 - INTERMEDIATE CRIMINAL LAW

Pleas; Hearings; Discovery; Calendaring; Motions.

### WEEK 14 - COURSE REVIEW/PREPARATION FOR FINAL EXAM

### WEEK 15 - FINAL EXAM

*Instructor: Lynne Prescott, CCLS*



## ADVANCED DISCOVERY COURSE (ONLINE)

A six-week, online advanced discovery course. Work at your own pace. Classes will take place online utilizing video lectures, discussion boards, email, live Q&A sessions and quizzes. Login information will be provided the day before the class is scheduled to begin.

Some of the topics that will be covered:

- Drafting Interrogatories (Form, Contention and Special Interrogatories)
- Drafting Demand for Production of Documents
- Drafting Requests for Admissions
- Drafting Deposition Notices
- Drafting Demand for Physical Examinations
- Drafting Deposition Subpoenas
- Drafting Subpoenas for Production of Documents
- Motions to Quash
- Answering Interrogatories
- Answering Demand for Production of Documents
- Answering Requests for Admissions
- Objections to Discovery Requests
- Meet and Confer Letters
- Motions to Compel Further Responses

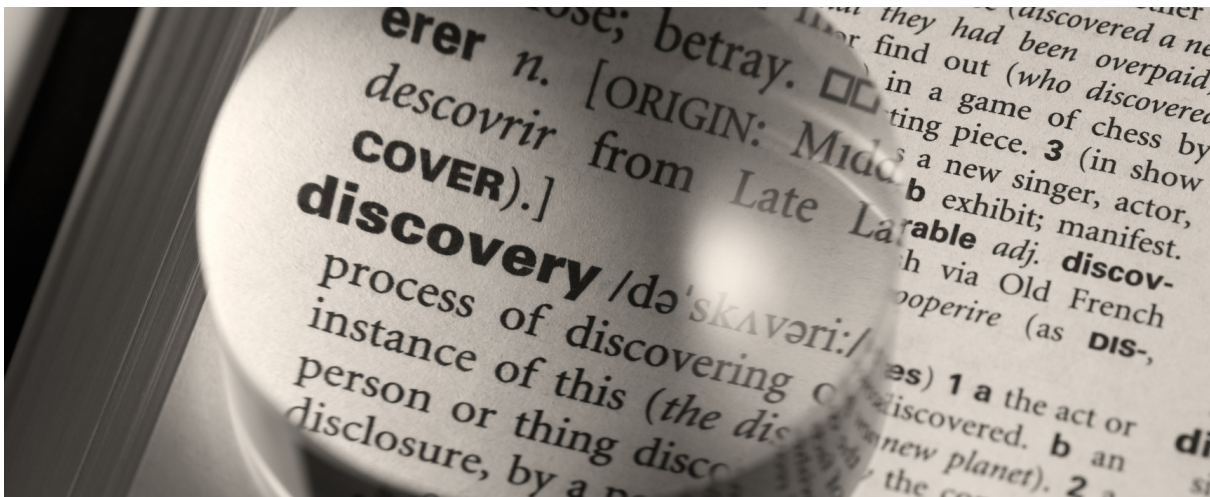


### **Required Textbook:**

Advanced Discovery Reference Guide (included in cost of registration).

Upon successful completion of the course, students will receive a certificate from LPI.

*Instructor: Vanessa Buffington*





## ADVANCED LEGAL PROFESSIONALS TRAINING COURSE (ONLINE)

A 13-week, online advanced course designed to follow the Intermediate Legal Professionals Training Course, as well as serve as a higher level of training for the seasoned legal support professional.

Each course will be a live, real-time, interactive course conducted via Zoom. Students will have in-class group labs via breakout rooms, as well as outside class assignments. Weekly quizzes and the final exam will be administered via Google Forms. Google Suites (available on most mobile devices and desktop) will be used for the course. A Google email account will need to be set up before the course begins. Webcam and mic capability will be needed for this course.

Each individual must register separately. Upon completion of the course, students will receive a certificate from LPI.

**Required Text:** *The Legal Professionals Handbook* will be used as the textbook for this course and is included with the cost of the course.



Upon successful completion of the course, students will receive a certificate from LPI. Classes will be recorded for further review before the final exam.

A discounted rate can be arranged for firms or offices that wish to enroll a group of students.

### WEEK 1 - ORIENTATION

Training on Zoom, Google Suites and Slack platforms; course overview.

### WEEK 2 - WRIT PROCEDURES

Proper Venues for Filing; Components of Writ Practice; Preparing and Lodging the Record; Post-Hearing Procedures.

### WEEK 3 - CONSERVATORSHIPS

Various Conservatorship Types and Procedures in California Law.

### WEEK 4 - ADVANCED MOTION PRACTICE

Motions for Summary Judgment/Adjudication; Using the MSJ for Trial Readiness; Specialty Motions

## LEGAL PROFESSIONALS, INCORPORATED

### WEEK 5 - JUDGMENT AND POST-JUDGMENT PROCEDURES

Obtaining the Order; Notice of Entry of Judgment; Judgment; Enforcement of Judgment; Memorandum of Costs and Fees.

### WEEK 6 - APPELLATE PRACTICE (PART 1)

State Appellate Procedure.

### WEEK 7 - APPELLATE PRACTICE (PART 2)

Federal Appellate Procedure.

### WEEK 8 - FEDERAL PRACTICE (PART 1)

Federal Civil Procedure.

### WEEK 9 - FEDERAL PRACTICE (PART 2)

Federal Criminal Procedure.

### WEEK 10 - ADMINISTRATIVE AND REGULATORY LAW

Administrative Procedures Act; Administrative/Regulatory Agency Filings and Remedies; Office of Administrative Law.

### WEEK 11 - TRIAL PREPARATION (PART 1: Civil, Family Law, Probate, etc.)

Pre-Trial Motions; Jury Instructions; Logistics; Trial Binders; Exhibits; Witnesses; Subpoenas; Experts; Verdict; Post-Trial Procedure.

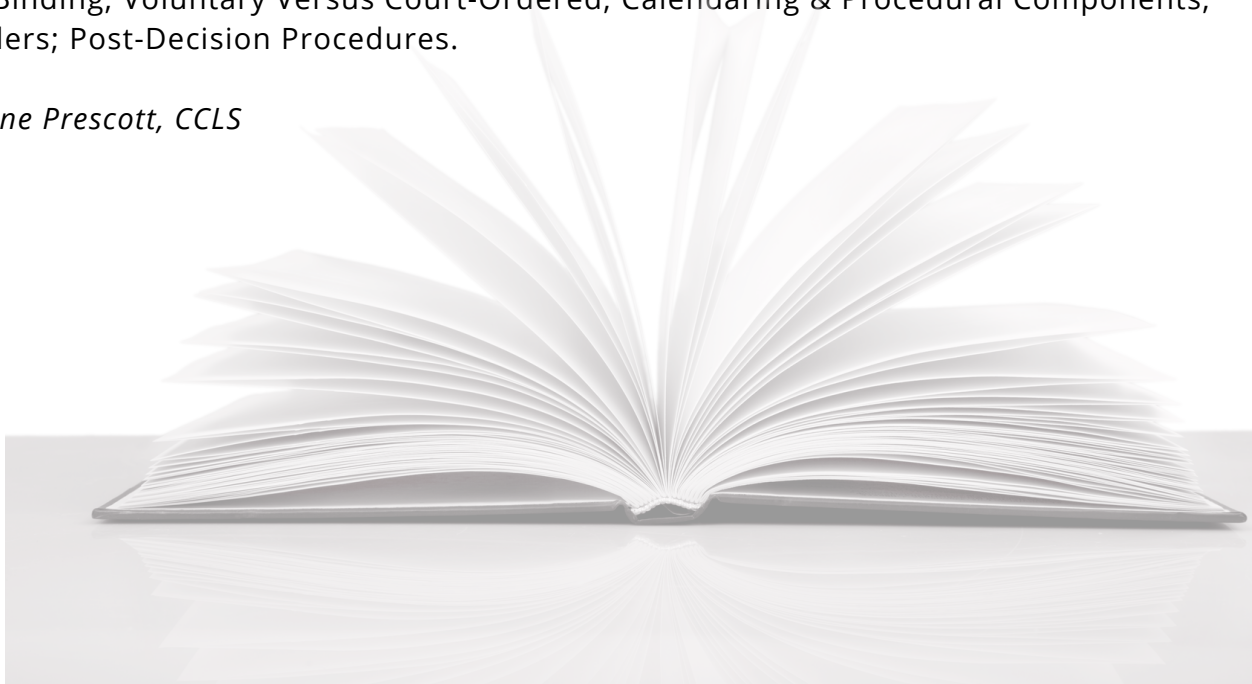
### WEEK 12 - TRIAL PREPARATION (PART 2: Criminal)

Pre-Trial Motions; Jury Instructions; Logistics; Trial Binders; Exhibits; Witnesses; Subpoenas; Experts; Verdict; Post-Trial Procedure.

### WEEK 13 - ARBITRATION AND MEDIATION

Binding/Non-Binding; Voluntary Versus Court-Ordered; Calendaring & Procedural Components; Decisions/Orders; Post-Decision Procedures.

*Instructor: Lynne Prescott, CCLS*



## APPELLATE AND FEDERAL COURT PREPARATION (ONLINE)

This is an eight-week, work-at-your-own pace online course that will cover appellate procedures within the California Courts of Appeal and Federal Rules of Appellate Procedure for the Ninth Circuit Court of Appeal, civil and criminal appeals. Classes will take place online using modules, quizzes and a final exam.

Handouts and a Reference Guide will be provided.

Example topics that will be covered in the course:

- Notice of Appeal
- Designation of records
- Calendaring deadlines
- Reporter's Transcript
- Clerk's Transcript
- Preparing the opening brief and appendix
- Preparing excerpts of records
- Efiling / Truefiling
- Motions in the Ninth Circuit
- And more!



*Instructor: Vanessa Buffington*

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## LEGAL RESEARCH/LEGAL WRITING

Overview is focused on federal and state court structures, how law is made, and research strategies. With this focus, attendees will benefit from an interactive dive into understanding court structure, how and why laws are created, and come away with actionable strategies to more effectively navigate legal research.



Check the LPI Website for upcoming legal research and writing courses/classes.

*Instructor: Bethany Ensz*

# ADDITIONAL EDUCATION ON-DEMAND LIBRARY PUBLICATIONS



## LEGAL TECHNOLOGY TRAINING

Our Legal Technology Training classes help meet California's requirement for attorneys and law office staff to be technically competent. Microsoft Office applications, Adobe, Best Authority, tips and tricks, and much more! *Instructor: June Hunter*

[MORE INFO](#)



## LEGAL PROCEDURE/TRAINING LIVE WORKSHOPS AND WEBINARS

LPI's Continuing Legal Education covers the gamut when it comes to procedural and training topics. Whether you're a beginner or a seasoned professional, these live workshops and webinars offer something for everyone.

[MORE INFO](#)



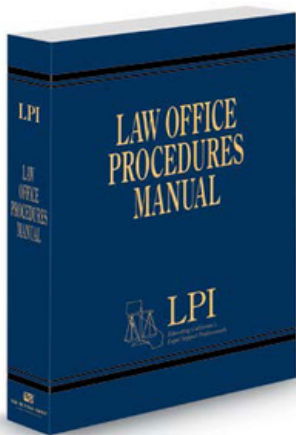
## ON-DEMAND LIBRARY

LPI's On-Demand Library contains over 40 recorded webinars at any given time on a myriad of legal procedure, technology, and continuing education topics. Ready to access at your convenience. Group rates available for multiple viewers.

[MORE INFO](#)



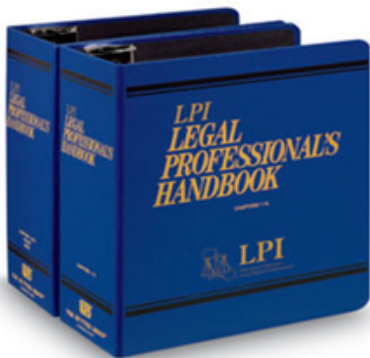
# ADDITIONAL EDUCATION ON-DEMAND LIBRARY PUBLICATIONS



## LAW OFFICE PROCEDURES MANUAL

A procedural handbook for California courts, and an ideal training manual for new legal staff. A concise training tool covering most areas of the law – civil, family law, bankruptcy, criminal, corporate, and more. Includes cross-references to code sections and other legal publications, examples of legal forms and step-by-step instructions for completing them. Also includes procedural checklists and a glossary of legal terms. Updated and reviewed annually by working members of the legal profession.

[MORE INFO](#)



## LEGAL PROFESSIONALS HANDBOOK

The most clear, concise procedural handbook for California courts on the market! Cross-references to code sections and other legal publications. 23 separate chapters giving deadlines and step-by-step instructions on what to do and how to do it. Reviewed and used by professionals throughout the state. Updated and reviewed annually by working members of the legal profession.

[MORE INFO](#)

# ADDITIONAL EDUCATION ON-DEMAND LIBRARY PUBLICATIONS



## LEGAL SECRETARIES REFERENCE GUIDE

A legal procedure guide designed for training office personnel and as a general reference for experienced staff.

[MORE INFO](#)



## THE LEGAL PROFESSIONAL

LPI's quarterly magazine containing articles written by attorneys, court personnel, and legal support professionals from all over California on topics relevant to those working in a law office or legal environment.

[MORE INFO](#)



## THE PODIUM (LEGAL BLOG)

LPI's monthly blog covering items of general interest, court updates, and legal procedure. Written by contributing authors actively working in the legal field. The Blog for California Legal Professionals.

[MORE INFO](#)

# MEMBERSHIP IN LPI

## Advantages of Membership

LPI® provides educational, professional, and personal development information to legal support staff throughout the state of California. These educational opportunities are available to members (and non-members, for a nominal fee) throughout California.

- Monthly educational programs and newsletters are provided by local associations
- General educational programs are offered at each LPI conference free to anyone registered to attend. Topics vary among specialized areas of law, ethics, law office products and management, and personal development.
- Many local associations offer study groups for members interested in preparing to take the California Certified Legal Secretary (CCLS®) examination. LPI also offers an online CCLS Study Course.

These programs are designed to provide current material and educational tools to enable law office support staff to remain current with the changes in general law, as well as in their respective areas of practice.

## Why Join Legal Professionals, Incorporated?

- Become one of the approximately 1,300 elite legal professionals in California
- All classes offered under the Continuing Education Silo are FREE to LPI members.
- Build a network of knowledge by meeting other legal professionals
- Continuing education is the main focus of Legal Professionals, Incorporated
- Our motto: "Excellence through Education"
- Expand your personal and professional development and skills through a multitude of educational opportunities offered statewide
- Enjoy discounted educational benefits through the Continuing Education of the Bar
- Become a California Certified Legal Secretary (CCLS®) through a course of study and a comprehensive examination
- Easily maintain your CCLS credits and your MCLE credits through workshops and seminars sponsored by the LPI University, LPI Technology Training and the Continuing Education Council of Legal Professionals, Incorporated
- LPI is a State Bar approved MCLE provider



<https://www.legalprofessionalsinc.org/become-a-member/>

# THANK YOU!

On behalf of the course instructors, Legal Professional, Inc.'s Education Committee, and Executive Board, thank you for entrusting us with your continuing education needs.



WWW.LEGALPROFESSIONALSINC.ORG

