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[WWW.SLSA.ORG](http://WWW.SLSA.ORG)

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**Sacramento Legal Secretaries Association**



**Theme of the Month:**

**Trial Preparation**

**Events**

- **Mock Trial – December 16.** This event will be held at the Courtyard Marriott, 4422 Y Street. You can register online through our website or contact Rosa Deniz at [rdeniz@pacific.edu](mailto:rdeniz@pacific.edu). *See page 27.*
- **SLSA Stocking Giveaway – December 17.** SLSA is once again helping Loaves and Fishes make holiday wishes come true. We are participating in the stocking give away. For a list of items needed and details please look at the flyer in this bulletin. *See page 16.*

**Mission Statement**

The Sacramento Legal Secretaries Association (“SLSA”) is a nonprofit, educational organization whose purpose is to further knowledge of law and its procedures, promote a high standard of ethics, encourage a statewide networking system, and advance the interests of our members and the legal community.

**NON-MEMBERS ARE WELCOME!**



# President's Report

by Astrid Watterson, CCLS



Astrid Watterson, CCLS

The end of the year is here! I hope many of you enjoyed your Thanksgiving with your friends and family. November was another busy month for SLSA and I'm sure for all of you as well, since some of us had a few days off from work. Before I let you know what we have in store for December, I thought we would recap a bit of November, our Probate and Estate Planning month. Our lunch lesson taught us what could go wrong in estate planning and probate matters. Our speaker attorney Douglas Alliston was informative and the class was well attended. Our speaker for the dinner meeting was attorney Barry Matulich, who taught us about probate litigation and how it compares to civil litigation. Both presen-

for the year - a holiday Stocking Giveaway. This year, we are participating in the stocking giveaway from Loaves and Fishes. There is information in this bulletin and on our website regarding this event. If you can, please help us collect stockings to give away.

December promises to be another fun and exciting event - our Mock Trial! This year, we will have our mock trial at the Marriott instead of at the court. Unfortunately, the cost of renting the courtroom increased this year. However, the Marriott is working with us so that we can transform the meeting room into a courtroom. Rebecca Lerma and her committee are working to fill all of the roles needed. John Baldwin has written yet another

As the year ends and we wrap up 2010, we have to start looking forward to the future - 2011. What will it hold for us personally and professionally, specifically, what will it hold for SLSA? It's that time again when we need to start thinking about elections. Each year our association holds elections for office. The offices that we vote on are for: President, Vice-President, Secretary, Treasurer, and Governor. February is our election month where we announce the nominees for each office. Usually, it works out that those who are on the current board will move up a position until they become President. However, for reasons out of our control, it seems that many on the current board will not be able to

"...we have to start looking forward to the future - 2011."

~ Astrid Watterson, CCLS

**"Remember, February is nominations and elections. I sincerely hope to see several names on the ballots this year."**

~Astrid Watterson, CCLS

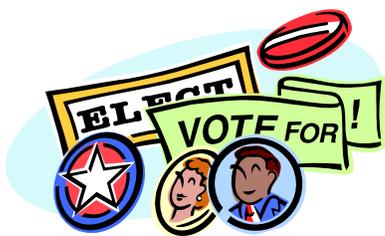
tations were informative and insightful. I hope that members who work in the probate and estate planning field were able to take advantage of the classes we offered, and for those who attended, but don't work in that particular field, I hope you were able to take away something new!

November also brought us our Birthday Magic event. As you will see in the enclosed article by Gloriela Garcia, the event was successful and we were able to make a few children happy for their birthday. Many thanks to all of those who participated either with their time or their donations! Gloriela has also planned our last charitable projects event

er hilarious script. It's the case of *The Great Pumpkin v. The Major TV Networks!* Do you hear the Perry Mason theme yet? This time of year is always my favorite. We will conduct a little business, but the majority of the time is dedicated to the Mock Trial. Finger foods will be served and we will also have a holiday ornament exchange. If you haven't done so, please register and join us for this holiday event.

Unfortunately, this month with the holiday schedule we are not able to have a lunch lesson, but attending the mock trial and getting a feel for some procedure, even if informal, can be helpful.

continue next year. That leaves us with another stressful election. It's stressful because while we may have over 160 members, it is difficult to find volunteers who are willing to run the day-to-day business of this association. This year, we were fortunate in having teams on committees that could work together to bring us lunch lessons, evening seminars, and our dinner meetings as well as many of the other services SLSA offers. However, I find that while our goals were ambitious this year, not every year may be that way. In years past we were only providing members with educational opportunities through our general dinner meetings. Then we ex-



## President's Report (cont.)

by Astrid Watterson, CCLS

panded and with the help of volunteers, we began offering lunch lessons. This year, we expanded even more and added evening seminars. We are not required to do so, but in the best interest of our members and because we had the volunteers to accomplish this goal, we were able to provide them. Our work environment is one that changes and we must learn to keep up with those changes. The law changes, the rules change, the procedures change, etc. The Sacramento Legal Secretaries Association must be able to provide assistance to its members in learning about these changes and then, taking another step forward, and provide members with the opportunity to learn how to incorporate those changes into their work lives.

However, beyond the educational opportunities, is the daily routine of running the association. When you elect a president, you elect someone who can handle creating agendas for the board meetings, the general meetings, understanding what is needed from each chairman, what activities are being held, working with the secretary to ensure the minutes of the association are accurate, working with the treasurer to ensure that the budget is adhered to

and the bills are paid, working with the governor to ensure that our communications with corporate office are clear, working with the parliamentarian to ensure that we are following the Bylaws (rules) of our association, and asking for advice from the executive advisor to ensure that all is well.

Reading this may seem overwhelming and to some it may scare them away. Personally, I find it to be an enriching experience. Sure, there are times when it can be stressful, but it is also a wonderful experience. You are able to work with others in your profession and it is always touching when someone steps up and says: "Sure, I can do that." This is now my third term as President. My first two terms were in 2005-2007 and now 2010-2011. What I have learned throughout these years both as a worker bee and a president, is that the more helpers you have, the more you can accomplish, and the less work it takes for any one person. I urge you all to take a moment and think about what you can offer SLSA in the coming year. Is 2011 the year for you to step up and say: "yes, I can take minutes at the meetings" or "yes, I can be the treasurer" or "yes, I can put together an event or two" or

"yes, I can help with registration"? For the future of our association, I sure hope that 2011 is that year. We need volunteers to continue the association and ensure that all of us have some place where we can gather for the common purpose of continuing our education and making ourselves better legal professionals.

Remember, February is nominations and elections. I sincerely hope to see several names on the ballots this year. If any of you have questions regarding a specific office and its duties, the current board is happy to explain the requirements. Just ask Maimie who is new to the Treasurer position or Dawn who is new to the Governor position or Crystal who is new to the Secretary position and many of the chairmen are new too. They have never done it before, yet they are doing it now and are succeeding at their jobs!

Thank you for electing me as your president and Happy Holidays!



**'Personally, I find it to be an enriching experience'**

*~Astrid Watterson, CCLS*

## Member News

by Astrid Watterson, CCLS

Our condolences to Launa Atkinson, CCLS and her family for the loss of their father. When one of our own is grieving, we try to send our warm thoughts during the difficult times.





## Membership Chair Report

by Anne French

MEMBERSHIP CHAIR REPORT by Anne French

*Hello everyone and Happy Holidays.*

*If you're not a member, you can contact me at (916) 520-5268 or e-mail me at [afrench@downeybrand.com](mailto:afrench@downeybrand.com) for information regarding membership.*

*Below are our new members that have recently joined SLSA.*

**JUSTINE A. GAMAYO** – Justine is a legal secretary for Johnson, Fort, Meissner, Joseph & Palley. She has been a legal professional since March of 2008. Justine celebrates her birthday on September 5. She enjoys boxing, kickboxing, softball, hockey, basketball, and MMA.

**SUSAN RAMSEY** – Susan is a general manager with Esquire Deposition Solutions. She has been a legal professional since June of 1978. Susan celebrates her birthday on June 1. She enjoys quilting, scrapbooking, ceramics, and pets.

*Are you an SLSA member who has changed jobs? Been promoted? Recently engaged or married? New addition to the family? We want to know about you. Let us celebrate your accomplishments with you during good times and support you during tough times. Please send your news to [afrench@downeybrand.com](mailto:afrench@downeybrand.com).*

**"To find what you seek in the road of life, the best proverb of all is that which says:  
Leave no stone unturned." ~Edward Bulwer Lytton**

## Benefit Highlight

by Dawn Forgeur, CCLS



More deals from Working Advantage ([www.workingadvantage.com](http://www.workingadvantage.com))! If you are looking for a holiday gift for friends or family, remember to check out Working Advantage's deals online. Just send me an email ([forgeurd@gtlaw.com](mailto:forgeurd@gtlaw.com)) to get LSP's member ID number so you can take advantage of these offers. This is just a very small sampling of what is available online:

**Best Buy:** Free shipping on select items. 10-33% off select GPS receivers. Up to 15% off select HDTVs. Up to 20% off select digital cameras.

**Target:** Save 10% on your order.

**Justice:**

The leader in fashion for 'tween girls ages 7 to 14. 40% off sitewide, through 12/31/10.

**Cardstore:**

Find photo cards, holiday cards, party invitations, as well as wedding and baby announcements and even stationery. Add your own photos and text - we'll print and mail your custom photo cards anywhere! 15% off Holiday cards and invitations through 12/31/10.

**Shari's Berries:** 15% on orders \$24.99+, through 7/31/11.

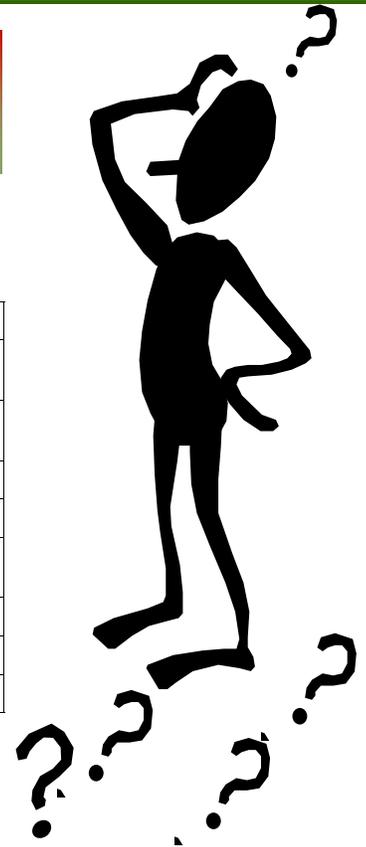
# How Do I?

*Question submitted by Molly Mahoney*

Have you ever had to file a brief or petition within the Court of Appeal and had to ask yourself, "What color should I make the cover?" Though this may sound simple, but the color of the cover can make the difference between filing your brief or the brief being rejected.

Appellant's opening brief or appendix	green	Petition for original writ	red
Respondent's brief or appendix	yellow	Answer (or opposition) to petition for original writ	red
Appellant's reply brief or appendix	tan	Reply to answer (or opposition) to petition for original writ	red
Joint appendix	white	Petition for review	white
Amicus curiae brief	gray	Answer to petition for review	blue
Answer to amicus curiae brief	blue	Reply to answer to petition for review	white
Petition for rehearing	orange	Opening brief on the merits	white
Answer to petition for rehearing	blue	Answer brief on the merits	blue
		Reply brief on the merits	white

For additional and further information please see the California Rules of Court, rule 8.40(b)(1).



# QUESTIONNAIRE

For Day in Court

Email submissions to [lernar@gtlaw.com](mailto:lernar@gtlaw.com)



Sacramento Legal Secretaries Association's annual Day in Court Event is scheduled for **Thursday, January 20, 2011**. We have invited guest speakers from Amador, Butte, El Dorado, Placer, San Joaquin, Stanislaus, Sacramento, Solano, Sutter, Yuba and Yolo counties as well as the Third Appellate District Court of Appeals.

We are planning to send each court a list of 10 questions and compiling a Frequently Asked Questions handout based on the responses received. The questions should be able to be answered in 1-3 sentences and be general questions that could be asked of each court. If you have a question in mind, please email your suggestions to Rebecca Lerma at [lernar@gtlaw.com](mailto:lernar@gtlaw.com) or fax this form to Rebecca at 916-448-1709.

Question(s) for the Court: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Name (not required): \_\_\_\_\_ Email (not required): \_\_\_\_\_



# Parliamentarian's Corner

by Astrid Watterson, CCLS

## How Do You Amend A Motion?

According to Roberts Rules of Order, amendments are changes or modifications of the wording, and sometimes the meaning of the main motion. Last month we discovered the meaning of a motion and we used the following example:

*Jane Legal:* "Madame President!"

*Chair:* "Yes, Ms. Jane."

*Jane Legal:* "I move that SLSA's logo colors be changed from blue and yellow to pink and purple."

An amendment usually arises during a debate of a main motion; in this case it is whether to change SLSA's logo from blue and yellow to pink and purple. However, what if during the debate there are some members who agree that we should change the colors, but not to pink and purple; they would rather

have green and orange? In that case, a member can choose to move to amend. The language for the motion would then be: "I move to strike out the words 'pink and purple' and insert the words 'green and orange'."

The President's responsibility as chair, would be to repeat the motion to the membership. In this case, the motion currently being voted on is not to change the colors, but merely to amend the original motion from pink and purple to green and orange. Once we have settled the issue of the colors from pink and purple to green and orange, we can then go back to focusing on the main motion.

Knowledge of parliamentary procedure is essential to the office of President. The chair must know the process of making motions and how to handle them during meetings. Usually, the Parliamentarian is there to assist the

President, but a good President would know how to handle motions as well. The key is to make sure that motions are clearly worded and repeating the motion to the members so that it is clear and they know and understand what is being voted on.

Did you know that all board members, new and old, are required to attend a parliamentarian workshop near the beginning of the fiscal year? Don't worry, if you are not quite comfortable with parliamentary procedure. SLSA has a long-standing relationship with Lorenzo Cuesta, R.P., who once a year gives SLSA incoming board members a workshop on parliamentary procedure. The workshop is great and helps new board members better understand how to handle motions and meetings.

'Did you know that all board members, new and old, are required to attend a parliamentarian workshop near the beginning of the fiscal year?'

~Astrid Watterson, CCLS

# Vendor Spotlight

## November Lunch Lesson: Nationwide Legal



In November we were fortunate to have Nationwide Legal as our lunch lesson vendor. Many thanks to Alex Cain and Guillermo "Moe" Talamantes of Nationwide Legal. For those of you who may not know already Alex used to be at another local court filing firm, but has since moved to Nationwide Legal. This firm can help you with your court filings throughout California, can

help with your pdf/fax filings, can help you with court research such as copying, indexing, searches in all courts, county recorders, searches in federal archives, the secretary of state, the department of corporations, law libraries, etc. They can also serve as an online repository for your documents to be scanned and stored. Not only can they help you file your documents just about anywhere, they can

also serve as process servers and ground courier messengers. Basically, if you need help getting your documents to the courthouse or simply filing them in another county, and want to rest assured that the filing will be done, call Alex and Moe at (916) 443-4400.



# Second Annual Bay Area Legal Secretaries, Inc. LEGAL TRIVIA THROWDOWN!



Sacramento Legal Secretaries Association invites you to join us for an inter-association, fun competition. Gather your association members and form a team. We will be competing in a Jeopardy game show format. There is no limit to the number of members on your team. All contestants must be active LSI members.

Everyone is welcome for lunch and cheering!

All Jeopardy questions are from CCLS materials. You do not have to be a CCLS to participate. The winning association will be presented with a plaque and bragging rights for a year!

**WHEN: Saturday, February 5, 2011**  
**TIME: 11:30 a.m.**  
(Approximately 2 hours for lunch and competition)  
**WHERE: Scott's Seafood & Grill**  
**Jack London Square**  
2 Broadway, Oakland, CA  
Tel: (510) 444-3456  
**\$28 LSI Members/\$29 Non-Members**

Space is limited. Please RSVP by January 14, 2011.  
Late registrations must add \$3 for reservations made after January 14, 2011.

NAME: \_\_\_\_\_

ASSOCIATION NAME: \_\_\_\_\_

EMAIL: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_

WILL YOU BE COMPETING? \_\_\_\_\_ Yes \_\_\_\_\_ No

**Indicate Entrée Selection:**

- Chicken Piccata (Sautéed with Lemon-Butter Caper Sauce, served with Herbed Rice and Fresh Vegetables)
- Pasta Primavera (Fresh Pasta with Julienned Vegetables topped with Grana Cheese)

Complete and detach reservation form. Enclose **check payable to SLSA** and mail to:  
Diane West, CCLS  
Law Offices of Richard W. McGinnis  
2999 Douglas Blvd., Suite 185  
Roseville, CA 95661  
  
If you have any questions, please contact:  
Diane West, CCLS  
email: dwestmcginnis.law@hotmail.com  
or  
Launa Atkinson, CCLS  
email: latkinson@cddl.com

Answers to Jeopardy questions will be provided at end of competition for use in studying for CCLS exam.

# Of Note



## DID YOU KNOW?

- The Sacramento County Superior Court's Local Rule 3.01, subdivision (d) requires that all noticed motions and demurrers in departments which issue tentative rulings must include the following information in the notice:

"Pursuant to Local Rule 3.04, the court will make a tentative ruling on the merits of this matter by 2:00 p.m., the court day before the hearing. You may access and download the court's ruling from the court's website at <http://www.saccourt.ca.gov>. If you do not have online access, you may obtain the tentative ruling over the telephone by calling (916) 874-8142 and a deputy clerk will read the ruling to you. If you wish to request oral argument, you must contact the courtroom clerk at (916) 874-7858 (Department 53) or (916) 874-7848 (Department 54) and the opposing party before 4:00 p.m. the court day before the hearing. If you do not call the court and the opposing party by 4:00 p.m. on the court day before the hearing, no hearing will be held." (Amended effective 1/1/10)

- Beginning November 15, 2010, the Division of Water Rights Records Unit will be implementing a new, centralized e-mail address for all records viewing appointments and reproduction requests. To make an appointment to view records, please contact the Records Unit at (916) 341-5421 or by the newly established e-mail address at [dwr@waterboards.ca.gov](mailto:dwr@waterboards.ca.gov).
- On November 17, 2010, the United States District Court adopted amendments to the Local Rules of Practice of the court, effective December 1, 2010. The amendments may be found on the court's Internet website at [www.cod.uscourts.gov](http://www.cod.uscourts.gov).
- Effective January 1, 2011, the Judicial Council will have revised and new forms to use. For a full and complete listing, please visit their website at [www.courtinfo.ca.gov/forms/latest.htm](http://www.courtinfo.ca.gov/forms/latest.htm). In particular are the following, please note that this is NOT a complete list:

### Electronic Filing and Service

Form EFS-005 – Consent to Electronic Service and Notice of Electronic Notification Address (Revised)

Form EFS-010 – Notice of Change of Electronic Service Address (Revised)

Form EFS-020 – Proposed Order Cover Sheet for Electronic Filing (NEW and MANDATORY)

### Expedited Jury Trial

Form EJT-010-INFO – Expedited Jury Trial Information Sheet (NEW and MANDATORY)

### Miscellaneous

Form MC-012 – Memo of Costs after Judgment, Acknowledgment of Credit, and Declaration of Accrued Interest (Revised)

In addition to revised and new forms, there appears to be several new forms specific to school violence prevention, some of which are mandatory and others which are optional for use.

- Also, please note that the following judicial council forms have been revoked beginning as of January 1, 2011:

DV-160 – Child Support Order – Order of Protection

GC-005 – Declaration of Private Professional Conservator or Guardian – Qualifications

GC-006 – Declaration of Private Professional Conservator or Guardian – Continuing Education

WV-132 – Proof of Service by Personal Delivery of Completed Response (Workplace Violence)

## ARE YOU FAMILIAR WITH THE SACRAMENTO COUNTY SUPERIOR COURT'S INTERNET USE POLICY?

- All wireless users must follow guidelines while using the court's wireless network. Misuse of the wireless network may result in loss of wireless and Internet connectivity solely at the discretion of the Court, and may also be followed by a criminal investigation. Misuse includes, but is not limited to using the wireless network for any illegal activity, sending spam, hacking into or causing damage to other local or Internet computing devices or resources, sending harassing messages to others, violating copyright and software licensing agreements, and viewing materials that are obscene or offending to others. Blogging in the jury assembly room or while serving on a case in an assigned courtroom is strongly discouraged. If a juror is found to be blogging information in reference to a case they have been assigned to during trial, this would be a violation of the juror's oath.

# Speaker Spotlight

## November Lunch Lesson: "Probate and Estate Planning," by Doug Alliston, Esq.

by Sophia Albov, CCLS



The Sacramento Legal Secretaries Association was lucky enough to spend a lunch hour with attorney Doug Alliston of Murphy Campbell Guthrie and Alliston. He spoke to us about probate and estate planning.

The conversation started with a discussion of testate and intestate proceedings. Testate proceedings occur when someone passes away (the decedent) and they have a will in place. Intestate succession occurs when the decedent dies without a will. If a will is not drawn up prior to the passing of the decedent then the state administers the process of disposing of the estate. To read more about the process of intestate succession check out Probate Code section 6400 et seq. To avoid intestate succession, make sure a will is drawn properly prior to death. This can be a

formal will or a holographic will (a hand written will). It is important to remember that the will is a public record whether or not a case goes through probate.

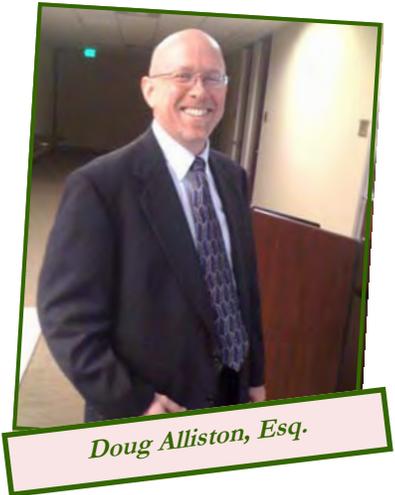
After the decedent has died there are sev-

*"Through the process of probate there are several requirements which must be met, the requirements are a good reason to have attorney assistance when dealing with an estate."*  
~Sophia Albov, CCLS

eral procedures that must be followed to properly handle the estate. These processes differ depending on whether a decedent is testate or intestate. For purposes of this article we will assume the decedent is testate. Primarily, the will must be lodged with the court (must be within 30 days from the death) and a Notice to Administer Estate must be published in the newspaper of record where the decedent resided. The bond application must also be

prepared if there is no waiver of bond contained in the will. Generally a will designates an executor, which is the person who usually handles the aforementioned requirements. Through the process of probate there are several requirements which must be met, the requirements are a good reason to have attorney assistance when dealing with an estate.

Mr. Alliston received his B.A. in English from Oklahoma Christian College and his J.D. from the University of the Pacific McGeorge School of Law. He is admitted to practice in both California and Texas. He is an active member of the Sacramento Bar Association and the Federalist Society.



Doug Alliston, Esq.



**CONGRATULATIONS TO MICHELLE CHAVEZ, CCLS!**  
Michelle took the October 2010 California Certified Legal Secretary exam and passed it! Congratulations to Michelle for taking on such a big task and succeeding. Thank you to Elizabeth Bomke, CCLS for helping Michelle study for the exam.



Pictured from left to right: Jennifer Estabrook, CCLS, Astrid Watterson, CCLS, and Michelle Chavez, CCLS

**Southern Butte County Legal Professionals Association**

invites you to celebrate

**“WOMEN THRU THE AGES”**

February 25-27, 2011

LSI Quarterly Conference

Gold Country Casino and Hotel

Oroville, California

**\*\* UPDATED \*\***

**\*\* CONFERENCE REGISTRATION FORM \*\***

Name (to be used on badge): \_\_\_\_\_  
 Mailing address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_  
 E-mail Address: \_\_\_\_\_ Fax Telephone: \_\_\_\_\_  
 Local Association: \_\_\_\_\_ LSA/LPA

(Spell out)

INDICATE IF YOUR ARE:	Title	INDICATE IF YOU ARE:	Title
_____ State Officer	_____	_____ Governor	_____
_____ State Chairman	_____	_____ PLS/CCLS	_____

**SCRIP** (includes Registration, Welcome Reception, Banquet & Brunch):

POSTMARKED on or before January 25, 2011	\$106.00	\$ _____
POSTMARKED after January 25, 2011 (no exceptions)	\$116.00	\$ _____

**SINGLE TICKETS: FRIDAY NIGHT**

_____ Registration PRIOR to January 25, 2011	\$ 15.00	\$ _____
_____ Registration AFTER to January 25, 2011	\$ 25.00	\$ _____
_____ Welcome Reception (Friday)	\$ 20.00	\$ _____

_____ SATURDAY NIGHT BANQUET:	\$ 40.00	\$ _____
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**Circle One:**

Tri-Tip, Mediterranean Chicken, Veggie Italian Lasagna

LUNCHEONS: Vegetarian Meal \_\_\_\_\_

_____ Presidents Luncheon (Saturday)	\$31.00	\$ _____
_____ Governors Luncheon (Saturday)	\$31.00	\$ _____
_____ Membership Luncheon (Saturday)	\$31.00	\$ _____

_____ SUNDAY BRUNCH:	\$31.00	\$ _____
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**TOTAL AMOUNT ENCLOSED** \$ \_\_\_\_\_

SPECIAL DIETARY CONSIDERATIONS: (please list, if any, including VEGETARIAN):  
\_\_\_\_\_

**NO REFUNDS AFTER FEBRUARY 11, 2011**

MAKE CHECKS PAYABLE TO: **SBCLPA CONFERENCE FUND**  
 MAIL TO: **Marci Koester, CCLS**, 1540 Crystal Ln, Paradise, CA 95969  
 Home (530)872-1859 Email: [crystalmagii@comcast.net](mailto:crystalmagii@comcast.net)

**Southern Butte County Legal Professionals Association**

invites you to celebrate

**“WOMEN THRU THE AGES”**

February 25-27, 2011

LSI Quarterly Conference

Gold Country Casino and Hotel

Oroville, California

**\*\* UPDATED \*\***

**HOTEL REGISTRATION FORM**

Name (to be used on badge): \_\_\_\_\_

Mailing address: \_\_\_\_\_

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

Home/Office Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Local Association: \_\_\_\_\_ LSA/LPA

Arrival Date \_\_\_\_\_ Departure Date \_\_\_\_\_

**Accommodations:** (per person)

- SINGLE/DOUBLE (Standard) Fri/Sat \$ 89.00 per night / Thurs \$69
- DELUXE (Jacuzzi tub) Fri/Sat \$ 99.00/\$119.00 per night / Thurs \$99
- VIP/DELUXE (Jacuzzi tub on Plaza Deck for EC) \$99 - Th / \$119 - Fri/Sat

All **cancellations** must be made by 4 pm **two days** prior to the arrival date.

**Smoking rooms** available. Arrangements must be made with hotel at time of reservation.

**Check In/Out:** \* Check In Time: 3:00 pm Check Out Time: 11:00 am

\* Early arrivals or late checkouts are not guaranteed and must be in writing and approved by hotel management in advance.

**Parking:** FREE VALET PARKING Available

**Airports:** Sacramento International Airport (SMF) - 65 miles from Casino  
Chico Airport - 28 miles from Casino

Please call **GOLD COUNTRY CASINO & HOTEL** for reservations, directly:

**(530)538-4560 or (800-334-9400)**

Use Code “**LSI**” to identify yourself as being a part of LSI to get the group rate.

GENERAL INFORMATION, CONTACT:

**JUDITH WILLIAMS**, Conference Chair

(530)534-8973

[pwplgl2@yahoo.com](mailto:pwplgl2@yahoo.com)

# Employment Report/Positions Available

by Jaymie Moralez



This free benefit provides the legal community with a place to post job openings for all categories of job positions. SLSA assists in every possible manner to procure employment for members of this association, and cooperates with attorneys in filling positions in law offices, but in no event does this committee act as an employment agency.

Attorneys will need to give the following information to the Employment Chair: name, firm name, address, phone number(s), areas of law practice, software used, position available, years of experience required. The attorney/employer is requested to e-mail the Employment Chair and Webmaster with the advertisement formatted like those currently posted on the "Employment Opportunities" page. Ads are usually posted within 48 hours.

It is the responsibility of the applicants to contact the employers, schedule interviews, exchange résumés, and to discuss benefits and salary, etc. All information is listed until notification to drop the name/position is given to the Employment Chair and/or Webmaster.

Please contact Employment Chair Jaymie Moralez, at (916) 446-7979, or e-mail her at [jmoralez@somachlaw.com](mailto:jmoralez@somachlaw.com). A detailed message can be left, and your call will be returned within 24 hours. If you wish your listing to be placed on our web page, please indicate your authorization to do so.

## Positions Available:

- **(11/22/10) Litigation Secretary** A busy boutique personal injury firm looking for an experienced litigation secretary; full benefits; full time; minimum three years experience; strong multi-tasking skills, attention to detail, and good communication skills a must. Please fax or e-mail cover letter and resume to Lena L. Dalby, Esq. at (916) 677-2143 or [ldalby@dalbywyant.com](mailto:ldalby@dalbywyant.com).
- **(11/5/10) Litigation Secretary** Seeking an experienced litigation secretary for a solo attorney. Candidate should be organized, detail-oriented, self-motivated, and able to multi-task and work independently. Experience in word processing/transcription, scheduling, calendaring, and proficiency in Abacus, WordPerfect required. Please contact Tim Bonner at (916) 320-5665.
- **(11/3/10) Part-Time Legal Secretary** Solo personal injury firm is seeking an experienced legal secretary to work 25 or more hours per week. We are looking for a self-motivated person who can answer the telephone, open new case files, prepare general correspondence, order medical records and billing statements from medical providers, and independently organize the case files. You must be motivated and able to learn quickly. Qualifications: must be detail oriented, have excellent telephone skills, able to multi-task, computer literate, transcription skills, and ability to work with other staff. Salary will depend on level of experience. To apply, please e-mail resume to [CALitParalegal@aol.com](mailto:CALitParalegal@aol.com).
- **(11/3/10) Legal Assistant/Secretary in Mendocino County** Full time position for busy family law attorney in Fort Bragg, beginning January 2011. Minimum 5 years legal secretarial experience required, family law preferable. Medical benefits available. Salary commensurate with experience. Please mail or drop off letter of interest and resume to: Petersen Law Offices, 1102 S. Main Street, Suite 2, Fort Bragg, CA 95437; or email to: [petersen@mcn.org](mailto:petersen@mcn.org), no later than November 24, 2010.
- **(10/8/10) Receptionist** Midsize labor and employment law firm is seeking a hard working, motivated individual to serve as a receptionist for the attorneys and staff in its Sacramento office. The ideal candidate would be a self-motivated, dynamic person who can take charge of the firm's front desk. Qualifications: Reliable, superior phone etiquette, professional appearance, detail oriented, excellent customer service, able to multitask, computer literate, ability to work collaboratively other staff. Responsibilities: Answering and connecting all incoming calls, greet office visitors and direct them to proper personnel, sort and distribute mail, sign for deliveries and notify proper personnel of deliveries, general upkeep of front office are and other areas in firm, overflow secretarial duties as necessary, other duties as assigned. Salary is commensurate with experience. To apply, please e-mail resume to [info@cookbrown.com](mailto:info@cookbrown.com).



# CCLS Quiz

by Jennifer Estabrook, CCLS

## Trial Preparation

### True or False:

1. Subpoenas and fees to trial witnesses must be personally served.  
 True  
 False
2. The original subpoena to trial witnesses must be filed with the court.  
 True  
 False
3. Motions in limine are heard in the judge's chambers.  
 True  
 False
4. A peremptory challenge is the right of an attorney to reject a prospective juror on legal grounds.  
 True  
 False
5. The party who requested a jury trial must deposit one week's jury fees with the court clerk before the trial.  
 True  
 False
6. Settlement Conference Statements are required to be filed and served no later than five calendar days before the date of conference.  
 True  
 False
7. Expert depositions must be concluded 15 days before the trial date.  
 True  
 False
8. Only plaintiffs may make a "998 Offer," or Offer to Compromise..  
 True  
 False
9. If there is more than one defendant in the case, the 998 offer must be made to all defendants.  
 True  
 False
10. The deposition of any expert trial witness is to be taken at a place that is within 75 miles of the courthouse where the action is pending.  
 True  
 False



*Answers on page 31*

# Speaker Spotlight

## November General Meeting: “Probate Litigation,” by Barry K. Matulich, Esq.

by Sophia Albov, CCLS



The Sacramento Legal Secretaries Association (SLSA) was honored to spend an evening with attorney Barry K. Matulich, discussing the ins and outs of probate litigation. Probate litigation covers the areas of guardianship, conservatorship, the estate of the decedent, trusts, powers

ing who the client actually is. For example, if you have grandma coming in to get her will drawn up and she is always accompanied by her son and granddaughter, who can you speak to about the case? If she wants her son to be in the consultation with her, does that invalidate the attor-

ever, Mr. Matulich cautioned that any attorney or person involved with an estate should keep track of how much time they spend on the matter. This is because if at any time the administrator or personal representative is replaced the compensation can be split, based on the time spent on

**“Therefore, if you have to answer anything in a probate matter it does not simply mean that you write an answer and get it verified.”**

~ Sophia Albov, CCLS

of attorney, elder abuse, and health care decisions for adults without a conservatorship. While it is a specialized field, it does cover many areas of law and requires special knowledge because some of the rules and regulations are different from civil litigation.

For example, pleadings are handled differently in probate litigation. There is no extension of time for service by mail! This is very important to remember if you ever find yourself in a probate situation. A verified petition is used in place of the style of pleading that is used in civil litigation. Therefore, if you have to answer anything in a probate matter it does not simply mean that you write an answer, you must have it verified. In Sacramento, probate court is even held in a different courthouse, the William R. Ridgeway Family Relations Courthouse, off of Power Inn Road.

Another matter that often comes up in the practice of probate litigation is determin-

ney-client privilege? It is very important in these cases that the true client is determined at the very beginning and that everyone in the office is clear who can and cannot be spoken to about the case.

One of the most important and misunderstood aspects of probate litigation which differs from civil litigation is the matter of compensation. Attorneys cannot request a retainer from estate and probate clients or set an hourly rate because the rate of pay is determined by the state of California and is predetermined. The California Probate Code very clearly spells out the compensation for a personal representative in sections 10800 - 10832. How-

the matter between the people involved.

Mr. Matulich majored in Business Administration at Sacramento State (go Hornets!) and received his J.D. and MBA from the University of Santa Clara. He is and has been very active with both the Sacramento County Bar Association and the California Bar. He has a private practice here in Sacramento.

### Probate Litigation Covers:

- Guardianship
- Conservatorship
- Estate of the Decedent
- Trusts
- Powers of Attorney
- Elder Abuse
- Health Care Decisions for Adults without a Conservatorship



Pictured from left to right: Astrid Watterson, CCLS, Sophia, Albov, CCLS, and speaker Barry Matulich, Esq.

## Vendor Spotlight

### November General Meeting: Esquire Deposition Solutions



November's dinner vendor of the month was Susan Ramsey from Esquire Deposition Solutions. Esquire has a large base of court reporters and videographers with depth of experience in various types and sizes of cases. They also have over 60 offices in 22 states and can provide several scheduling options. Not only

can they handle your court reporting needs, they have several online options to assist you in accomplishing your tasks such as a 2010 Esquire Filing Date Calculator. This nifty feature can help you calculate your docketing dates for a deposition and objecting to one as well. Susan can be located in the Sacramento

office at 2151 River Plaza Drive, Suite 300 and can be reached at (916) 446-2700. We thank Susan for joining us and providing us with a wonderful opportunity to get to know her and Esquire Deposition Solutions.



## Birthday Magic

by *Gloriela Garcia*

Birthday Magic was a charity event that Sacramento Legal Secretaries Association organized and sponsored to help celebrate a birthday for a little girl who lives at a shelter here in the Sacramento area. There were at least 10 children in attendance. It was my understanding that these children did not live with their parents at this shelter.

We helped set up for the birthday party, spoke and interacted with the children living at the shelter, passed out and served food and beverages to the children, sang happy birthday, cheered the birthday girl as she was opening presents, passed out goodie bags, and cleaned up.

Thank you to the volunteers: Dawn Willis, Vicki Haynes, Gianna S. Lee, Gloriela Garcia, Julia Diles, Irisol Ortiz, and Rose Pyle for all of your help.

Thank you to the birthday present donations from the following members: Debbie

Frias, CCLS, Aaliyah Muhammad, Rebecca Lerma, Sally Brooks, Beverly McBride, Gianna S. Lee, Vicki Haynes, Astrid Watterson, CCLS, Dawn Willis, and Crystal Rivera.

It's members like them who can make a positive difference in someone else's life.

The birthday girl was grateful for all her presents!

The workers at the shelter informed us that normally a birthday child for any given month may receive 3 to 4 presents. They were very impressed and thankful to see all the presents and help that we provided for them in the month of November.

The birthday girl received a lot of presents. She loved all of her presents, but most of all I could tell she was excited about her bible.

Thanks again to everyone who participated in making this event such a success.





## **SLSA Holiday Stocking Giveaway**

*Each year, as part of Loaves and Fishes holiday meal, Loaves & Fishes also offers each of their guests a holiday stocking. To assist Loaves & Fishes, we ask for your participation in providing stockings (approximate size: 14-16 inches long and 6-8 inches wide) filled with the following items:*

- \$5.00 Gift Certificate i.e. McDonald's, Barnes and Nobles
- One pair of new socks, one size fits all
- One set of stretch/knit hat and gloves
- Disposable razors (adult stockings only)
- A pair of shoelaces
- Chapstick
- Toothbrush and toothpaste
- A deck of cards
- Travel-size toiletry items (lotions, Vaseline, conditioners, shampoos, deodorant)

*If you would like to personalize your stocking for a woman, man, boy, or girl, please label it.*

**Please drop off donations by Friday, December 17, 2010 at either of these locations**

*Legacy Law Group, c/o Gloriela Garcia, 180 Promenade Circle, Suite 120, Sacramento, CA 95834, drop off times and dates are Monday-Thursday 8:30 a.m. to 5:00 p.m. or Friday 8:30 a.m. to 12:00 p.m.*

OR

*Somach Simmons & Dunn, c/o Astrid Watterson, CCLS 500 Capitol Mall, Suite 1000, Sacramento, CA 95814, drop off times and dates are Monday through Friday 8:30 a.m. to 5:00 p.m.*



# December 2010

## Dates to Remember

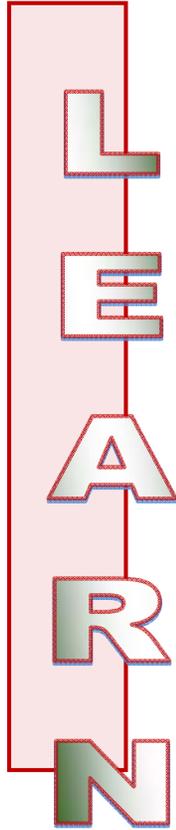
- **December 3 - Grammar Gregg's Way**  
(Location: Fagen Friedman & Fulfroost, LLP - Time: 5:45 p.m.)
- **December 6 - SLSA Board Meeting**  
(Location: Somach Simmons & Dunn - Time: 5:30 p.m.)
- **December 16 - Mock Trial** (Location: Marriott Hotel - Time: 5:30-8:00 p.m.)
- **December 17—Holiday Stocking Giveaway** (Drop off locations: Somach Simmons & Dunn, 500 Capitol Mall, 10th Floor; Legacy Law Group, 180 Promenade Circle, Ste 120)
- **December 20- Last Day to Submit Articles for the November issue of The Legal Eagle**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6 <i>Board Meeting</i>	7	8	9	10	11
12	13	14	15	16 <i>Mock Trial/ Ornament Exchange</i>	17 <i>Stocking Giveaway</i>	18
19	20 <i>Bulletin Art / Advertising Due Evening Seminar</i>	21	22	23 <i>Holiday</i>	24 <i>Holiday</i>	25
26	27	28	29	30	31	



# Vocabulary List

by Jennifer Estabrook, CCLS



## TRIAL PREPARATION

998 offer	An offer under Code Civ. Proc., § 998 made by any party any time prior to 10 days before the trial to allow judgment to be taken against a defendant. Also called an “Offer to Compromise.”
Evidence	all the means by which any alleged matter of fact whose truth is investigated at judicial trial is established or disproved
Expert witness	A witness having special knowledge not normally possessed by the average person of a subject about which he/she is to testify.
In camera	In the judge’s chambers
Judgment	The official decision of the court in a proceeding.
Mandatory settlement conference	A meeting of counsel and parties before a judge to determine if a settlement can be reached before trial
Motions in limine	A motion made before the start of a trial requesting that the judge rule that certain evidence may, or may not, be introduced to the jury in a trial
Peremptory challenge	An objection made to a juror for which no cause is given.
Perjury	The act of willfully making a false statement under oath.
Statement of decision	Factual or legal reasoning given by the court for making its judgment
Subpoena	A writ or order to compel a person to testify
Testimony	Oral or written statements made by a witness under oath
Venue	The place where a case must be tried
Verdict	The decision of a jury or court after trial of a cause of action
Voir dire	The examination of prospective jurors by the court and the attorneys at the beginning of a jury trial (Literally, “to speak the truth”)





# Sacramento Legal Secretaries Association

A Member of Legal Secretaries, Incorporated

Proudly Presents

## COURT UPDATES 2011

Many New Changes You Will Not Want To Miss!  
(Forms, Handouts, Information & Networking)

EXHIBITORS!!!

DOOR PRIZES!!!

**THURSDAY, JANUARY 20, 2011**

No-Host Bar: 5:15 p.m. to 6:00 p.m.  
Dinner: 6:15 p.m.

**Cost: \$36 (seating is limited)**

Location: HILTON—SACRAMENTO ARDEN WEST LOCATION  
2200 Harvard Street (located at Business 1-80 and Arden Way West)  
Sacramento, California Telephone: (916) 922-4700

Speakers: Court Clerks/Executive Officers from numerous counties.  
Day In Court: Rebecca Lerma, Day in Court Chair (lermar@gtlaw.com) Phone: 916-442-1111  
Chairs: Lynne Gomes, Day in Court Co-Chair (gomesl@gtlaw.com)  
Rosa Deniz, Day in Court Co-Chair (rdeniz@pacific.edu)

\*\*\*Please add \$5.00 for reservations made after January 10, 2011\*\*

\*\*\*Cancellations MUST be made 72 hours in advance for refunds. "No shows" will be billed\*\*\*

Please Mail Registration With Your Check

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_ Business: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

Are you interested in SLSA membership?  Yes or  No

If you are a member of a local LSI association, please state the name: \_\_\_\_\_ LSA/LPA  
Are you an LSI Officer or Chair? \_\_\_\_\_ If so, in which capacity? \_\_\_\_\_

Three course meal including salad starter, entrée, dessert, beverage, and coffee.

Please indicate your meal preference:

- \_\_\_\_\_ Chicken (Boneless breast of chicken stuffed with brie, asparagus, applewood bacon with lemon beurre blanc)
- \_\_\_\_\_ Beef (Boscaiolo grilled flank steak, sautéed Portobello mushrooms, Italian herbs, and a marsala demi glace)
- \_\_\_\_\_ Vegetarian (Three cheese ravioli with grilled vegetables and alfredo pesto cream)

Food allergies: \_\_\_\_\_

Reservations (By Check Only).  
Check Payable to: SLSA Cost: \$36  
Deadline: **Monday, January 10, 2011**  
MCLE/CCLS Credit: 1.0 hour

**Make Check Payable to:  
SLSA**

Mail to: Jennifer Shelton  
c/o Murphy Austin Adams Schoenfeld LLP  
304 "S" Street  
Sacramento, CA 95811  
jshelton@murphyaustin.com

If you cannot attend this event but are interested in membership, please contact Anne French,  
CCLS, Membership Chair at afrench@downeybrand.com

<http://www.slsa.org>



# Governor's Report

by Dawn Forgeur, CCLS



LSI's second quarterly conference was held on November 12-14, 2010, in North Hollywood, California, and it was hosted by San Fernando Valley LSA ("SFVLSA"). The theme was "Let Us Entertain You" and took place at the Beverly Garland Holiday Inn. SFVLSA definitely had fun with this theme, which included getting your

picture taken with life-size cutouts of The Jonas Brothers, Johnny Depp, James Dean, Marilyn Monroe, and Michael Jackson, all with the Hollywood sign as the backdrop.

I attended the Board of Governors Meeting and the Governors luncheon on Saturday. There were oral and

to purchase books written by Ed Poll. The proceeds will be divided between LSI (25%) and Ed Poll (75%). Ed Poll writes books on managing the business of law. There only cost to LSI is webmaster time to establish the link on our website. This recommendation passed.

**"LSI's third quarterly conference will take place February 25-27, 2010, in Oroville at the Gold Country Casino and Hotel. I truly hope to see some of our members attending this conference."**

~Dawn Forgeur, CCLS

written reports from various officers and chairman of LSI. I will be forwarding copies of these reports to SLSA's officers and chairman.

In August, LSI started a new membership drive contest taking place from September 1 through January 31, 2011. As of October 31, 2010, LSI had 1,527 members, which is a gain of 152 members since last conference.

There was a reminder from the Advertising Chair for members to visit the [www.lsi.org](http://www.lsi.org) site and click on the links to visit our vendors listed there.

There was a recommendation that LSI accept the offer of Ed Poll of LawBiz and post a link on the LSI website

The second recommendation was to use the funds from the Helen A. Wright Memorial Fund to purchase a laptop for use by the LSI Executive Secretary in an amount not to exceed \$1,030.82. The money in the Helen A. Wright Memorial Fund is specifically for purchases such as this and currently has \$1,030.82 in it. This is not the cost of a laptop, just a "not-to-exceed" amount for when LSI purchases the laptop and case. The LSI Executive Treasurer and Secretary have been sharing a laptop when feasible, but more often the Executive Secretary has been using her personal computer at work and home. This will enable the Executive Secretary to store all documents for her position on the laptop, including current and previous minutes, making it easier to pass on the infor-

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## Governor's Report (cont.)

by Dawn Forgeur, CCLS

mation to the next person. This recommendation passed.

At the Governors' Luncheon there was discussion regarding the LSI Administrator and her employment status. Currently, the LSI Administrator is an independent contractor, but she has requested her status be changed to employee. LSI has consulted its attorney regarding her status and it was recommended that her status be changed to employee status. The final decision must be made by the local associations. LSI will be completing its research and this information will be sent to me so that I may present it to our local Executive Board and the members to make a decision on how I should vote at the February 2011 conference. LSI would have to pay taxes, determine if she should be hourly or salary, would equipment be provided, should LSI pay for a payroll service, and what

kind of insurance would be needed.

The last motion was from the floor, moving the LSI Executive Committee to provide the Governors no later than January 15, 2011, information regarding the LSI Administrator's request for employment status versus independent contractor. The information to be included will be a breakdown as to attorney costs, CPA costs, benefits, taxes, etc. This motion passed. Once I receive this information, it will be passed along to our president for further handling.

Finally, LSI's third quarterly conference will take place February 25-27, 2010, in Oroville at the Gold Country Casino and Hotel. This is only 60 miles from Sacramento and should be a lot of fun since it is being held at a casino! The cost of a hotel room starts at \$89 per night for a single/double and \$119 per night for a triple. The cost of the tickets is only

\$106 before January 25, 2011. This hotel has a casino, steakhouse, and a bowling alley on site. The registration forms for conference and the hotel are in this issue of The Legal Eagle and they are online at [www.lsi.org](http://www.lsi.org). I truly hope to see some of our members attending this conference!



## CHANGE OF ADDRESS:

Please remember if you have moved offices or home, be sure to send us your Change of Address form so that we can update our records. This will minimize any delay in your receiving our monthly bulletin, any correspondence, and the LSI quarterly magazine. The change of address form can be found in this bulletin or on our website. They should be mailed to our Vice President and Membership chair, Anne French to her work address at Downey Brand, 621 Capitol Mall, 18th Floor, Sacramento, CA 95814.





## Capitol Mall DISTRICT

# THE SEVEN DAYS OF SHOPPING!

## Shop at the Holiday Fairs on Capitol Mall

### Tues - Nov 30<sup>th</sup>

- SHOP ON 25! Holiday Gift Fair  
*621 Capitol Mall*
- Discovery Toys Sale  
*300 Capitol Mall*

### Wed - Dec 1<sup>st</sup>

- Holiday Gift Fair  
*Plaza 555*
- Silpada Jewelry Sale  
*300 Capitol Mall*

### Thu - Dec 2<sup>nd</sup>

- Holiday Gift Fair  
*400 Capitol Mall*
- Holiday Boutique Fair  
*500 Capitol Mall*

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### Tues - Dec 7<sup>th</sup>

- See's Candy Sale  
*300 Capitol Mall*

### Wed - Dec 8<sup>th</sup>

- State Capitol Tree Lighting Ceremony  
*West Steps of State Capitol*

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### Wed - Dec 15<sup>th</sup>

- Book Fair  
*400 Capitol Mall*

### Thu - Dec 16<sup>th</sup>

- Capitol Mall District's Toy Trot  
*Capitol Mall - Old Sacramento to 7th Street*
- Book Fair  
*400 Capitol Mall*



Gather at The Greens

CHAPTER ACHIEVEMENT REPORTING FORM

Each Association in LSI participates every year in the Chapter Achievement Contest. Associations are grouped in categories depending upon the Association's membership (Group A: 5-30; B: 31-50; C: 51-75; D: 76-95; and E: over 95). Five awards of \$250 each are presented by Stuart F. Cooper Co. to the highest scoring Association in each of the above categories at the Annual Conference of LSI. Chapter Achievement points are tracked during the year by the Association's Governor. The Chapter Achievement Report covers activities from April 1, 2010 through March 31, 2011. This form's purpose is to track each member's activity during the course of the fiscal year. Please complete the form each time you attend a function and mail it to the person named below. If you attend a function and are not sure if it applies, include it below on the blank line provided and it will be determined if it applies. If you are an SLSA officer or committee chair, PLEASE take particular note to the last item below. Thank you.

- Month/Year Function
I submitted a potential advertiser to the Editor of The Legal Secretary magazine. (25 points per advertiser)
I submitted an article to The Legal Secretary magazine. (50 points per article)
I attended an LSI Quarterly Conference and/or Annual Conference. (50 points)
I attended an Officer/Chairman Workshop at the LSI Annual Conference. How many? \_\_\_ (25 points)
I attended the President's Roundtable at the LSI Annual Conference. (25 points)
I belong to an LSI-sponsored credit union. (100 points)
I am insured through an LSI plan. (100 points)
I rented a car through Hertz and received the LSI discount. (200 points per rental)
I enrolled in an LSI-approved retirement planning program. (100 points)
I sponsored a CCLS study group. (200 points)
I participated in a CCLS study group. (25 points)
I conducted a CCLS Mock exam. (150 points)
I took the CCLS exam. (Test date: \_\_\_\_\_) (100 points)
I passed the CCLS exam. (Test date: \_\_\_\_\_) (200 points)
I submitted questions to the Continuing Education Council for use on the CCLS Mock exam. How many? \_\_\_ (25 points)
I recertified as a CCLS during the 2010-2011 fiscal year. (50 points)
I gave a presentation on legal secretarial careers at a local educational institution. (50 points per presentation)
I attended another Association's monthly meeting, installation, or other function. (50 points per event)
I taught an educational workshop or seminar. (75 points per event)
I attended an educational workshop or seminar sponsored by SLSA or another local association. (25 points per event)
I attended an educational workshop or seminar sponsored by a Forum, CEB or The Rutter Group. (25 points per event)
I conducted a short session on legal procedures at an SLSA dinner meeting. (25 points per meeting)
I am a member of at least one Legal Specialization Section. (50 points)
I am a member of all six Legal Specialization Sections as of March 31, 2011. (100 points)
I attended a Legal Specialization Section Seminar at Quarterly or Annual Conference. How many? \_\_\_ (50 points per meeting)
I attended a Legal Specialization Section Regional Seminar. (75 points)
I submitted an article for use in a Legal Specialization Section newsletter. (50 points)
I submitted an article to LSI Director of Public Relations for publication in the Daily Journal. (50 points per article)
I gave a formal presentation on benefits of membership to a law office. (50 points per presentation)
I gave a formal presentation on benefits of membership to the local bar association. (100 points per presentation)
I purchased the LSI Legal Professional's Handbook between April 1, 2010 and March 31, 2011. (200 points)
I purchased updates to the LSI Legal Professional's Handbook between April 1, 2010 and March 31, 2011. (100 points)
I purchased the Law Office Procedures Manual between April 1, 2010 and March 31, 2011. (200 points)
I purchased updates to the Law Office Procedures Manual between April 1, 2010 and March 31, 2011. (100 points)
I am an SLSA officer or committee chair. I timely responded to my LSI counterpart's quarterly directive(s). Attached is (are) a copy (copies) of my response(s). (20 points per directive)

Name: \_\_\_\_\_ Phone: \_\_\_\_\_
Street Address: \_\_\_\_\_
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Please attach additional pages if necessary. Thank you for your assistance. If you have any questions, you can reach Dawn Forgeur, CCLS at (916) 442-1111; or e-mail at forgeurd@gtlaw.com. Otherwise mail to:

Dawn Forgeur, CCLS
SLSA Governor 2010-2011
Greenberg Traurig
1201 K Street
Sacramento, CA 95814

# Legal Procedures

by Laura Welch, CCLS, Nancy Vanderhorst, CCLS, and Molly Mahoney

## CIVIL TRIAL PREPARATION

### *Information pulled from:*

*Introduction to California Civil Litigation; Brenda Thomas Wilson, J.D. 2005 Thomasbooks LLC, pages 7-36 - 7-40; and Litigation by the Numbers; Fourth Edition; Julie A. Goren, Esq. 2007 Lawdable Press, pages 7-1 t 7-24.*

In most Superior courts in the state, trial dates are now set at the initial case management conference or placed on the trial setting conference calendar by the court. At the trial setting conference, the case will be assigned a mandatory settlement conference date and a trial date.

Be sure to check the local rules of each county for the particular trial calendaring requirements for the court. Some courts conduct trials only two or three days a week. Settlement conference statements are also county-specific, both in terms of time requirements and content.

When the trial date has been set in a case, many other deadlines are triggered; most importantly discovery is cut-off 30 days prior to trial. A cut-off is defined as the last day discovery responses are due or the last day a deposition can begin. A continuance or postponement of a trial date does not reopen discovery proceedings. [CCP §§ 2024.010, 2024.020(b)]

The relevant cut-off dates are:

- Discovery must be completed on or before **30 days** before the initial trial date [CCP § 2024.020(a)];
- Discovery motions must be heard on or before **15 days** before the initial trial date [CCP § 2024.0209a)];
- Expert witness discovery must be completed on or before **15 days** before the initial trial date [CCP § 2024.030]; and
- Expert witness motions must be heard on or before **10 days** before the initial trial date [CCP § 2024.030].

Be sure to calendar far enough in advance to send out interrogatories, requests for admission, request for production of documents, etc, so there is adequate time to review responses and “meet and confer” before filing a motion to compel.

When you know the settlement conference and trial dates, a calendaring worksheet should be completed. These dates should be calendared as soon as possible, especially the last day to file and serve discovery motions, expert witness motions, and the date of exchange for expert witness information. If you delay this calendaring too long, you might miss some critical deadlines.

Attached is a sample trial calendaring schedule. The schedule is an example of the count down calendaring required once a trial date is set. A copy of a calendaring schedule like this typically would be in the case file and in a file or binder of all upcoming trials.

The last few weeks prior to trial can be extremely hectic and chaotic for attorneys and their staff. Organizing, effectively communicating and being efficient is key to successful trial preparation, as is understanding key terms and differences between them.

# Legal Procedures (Cont.)

by Laura Welch, CCLS, Nancy Vanderborst, CCLS, and Molly Maboney

## TRIAL CALENDARING SCHEDULE (Sacramento County Superior Court)

Case Name: \_\_\_\_\_ Case No. \_\_\_\_\_

Settlement Conference: \_\_\_\_\_ at \_\_\_\_m. Dept \_\_\_\_\_

Trial: \_\_\_\_\_ at \_\_\_\_m. Dept \_\_\_\_\_, for \_\_\_\_\_ Days

Initial Trial Date Set on: \_\_\_\_\_

ACTION (Last Day)	DUE DATE	CAL DATE
1. LDT file S/C stmt. (& parties to receive)	10 days before S/C	_____
2. LDT serve exp. dmd.	70 days before trial <u>OR</u> 10 days after initial trial date set	_____
3. LDT serve rogs, req. adm., inspection dmd.	65 days before trial*	_____
4. LDT file/serve MSJ	110 days before trial*	_____
5. LDT disclose experts	20 days after demand <u>OR</u> 50 days before trial	_____
6. LDT file/serve discovery motions	↔approx. 48 days before trial*	_____
7. LDT ntc. depo	45 days before trial*	_____
8. LDT file/serve exp. motions	↔approx. 42 days before trial*	_____
9. Discovery closes; LDT hear MSJ; LDT ntc. exp. depos (by mail)	30 days before trial	_____
10. LDT deposit jury fees	25 days before trial	_____
11. LDF § 1987 Ntc. to appear/produce (in lieu of subpoena)	25 days before trial*	_____
12. LDF § 1987 Ntc. to appear; LDF exp. depos; LDT hear discovery motions	15 days before trial*	_____
13. LDF § 998 offer; LDT hear exp. motions	10 days before trial	_____

\*Date indicated is for service by mail. (Note: When choosing between two dates in Nos. 2 and 5, choose the one closer to trial)  
 ↔As soon as the trial date is known, calculate the exact last day



# Law Office Products/Management

by Astrid Watterson, CCLS



If you are from a large law firm, you may have your own internal docketing/calendaring service. Many of you may even have your own docketing clerk or calendaring department. However, for the small to medium size law firms, you may not be able to afford such a program. That's when Deadlines on Demand can come in handy.

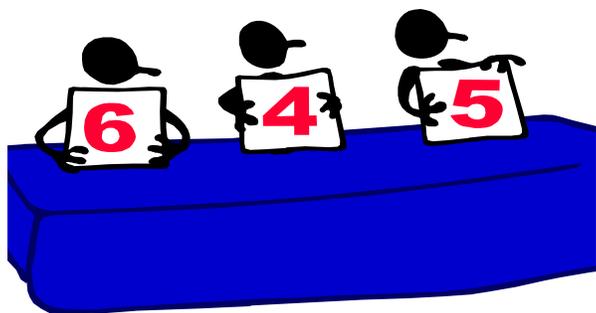
If you need to double check your calculations for larger events, such as pre-trial deadlines, this particular vendor is helpful and allows you to pay as you go. You can also designate a client/matter number to make it easy on allocating the charges when you receive the bill. They do have an option to become a member if you would like, for a \$20 monthly membership fee. If you

choose to do so, you can receive a monthly credit of \$30 toward usage and a 10% discount on all deadline calculations. You do not have to be a member to use this service.

I have found that for an office that does not have their own calendaring/docketing department or personnel, having a system such as Deadlines on Demand to rely on and double check your calculations is a life saver. You simply need to include what state, what county, and what type of item you wish to find out the deadlines for. It will pull up all statutory related deadlines as well as local rules that may apply and it will give you the reference to the code or regulation where it is pulling the dates from. If your calculations don't match the report,

you can always go to the source that it is citing and look for yourself. If you still disagree, Deadlines on Demand has a great customer service support center.

This article is not meant to advertise Deadlines on Demand necessarily, as there very well may be other vendors that can provide similar assistance such as CompuLaw; it is only meant to inform you that if you are a small to mid-size law firm and need deadline calculation support and do not already have a docketing program, this particular vendor can be a "must have" law office product. Their website is [www.deadlines.com](http://www.deadlines.com) if you are in need of it.



## Capturing CAPs (Chapter Achievement Points)

Have any of you ever volunteered to assist in a Sacramento County Bar Association event? Have you attended a local bar association event? Have you done so this year? If you have, you have earned SLSA Chapter Achievement Points! If you have attended a local bar association meeting SLSA can earn 50 CAPs per member per meeting. If you have volunteered at an event you can earn 75 points for SLSA. If you have done any of these events, please contact Dawn Forgeur, CCLS at [forgeurd@gtlaw.com](mailto:forgeurd@gtlaw.com) and let her know you have earned SLSA additional points!

SLSA ~

It has been such a pleasure to be a part of this organization as well as the bulletin. I just wanted to take a moment to wish everyone a very happy holiday season. From my family to yours, stay safe, travel light and enjoy all the season has to offer you.

Liz Gideon

SLSA Bulletin Editor 2010-2011





*Mark Your Calendars and Join Us for the  
Sacramento Legal Secretaries Association's Annual*

# **MOCK TRIAL EVENT!**



*December 16, 2010*

*5:30 - 8:00 PM*

*The Marriott Hotel*

*4422 Y Street, Sacramento*

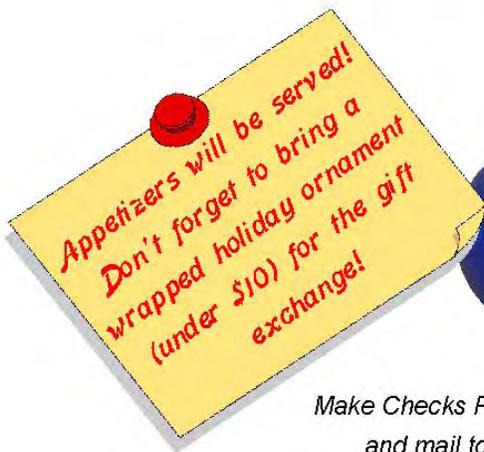
*All This Fun for Just \$15!!*

*RSVP by December 10, 2010 to Rosa Deniz  
(916) 501-4907 or rdeniz@pacific.edu*

## **"The Great Pumpkin v. The Major Television Networks and Their Affiliates"**

**A Question of Equal Time or Equal Opportunity**

*written by John Baldwin*



Volunteer Roles to be Filled:

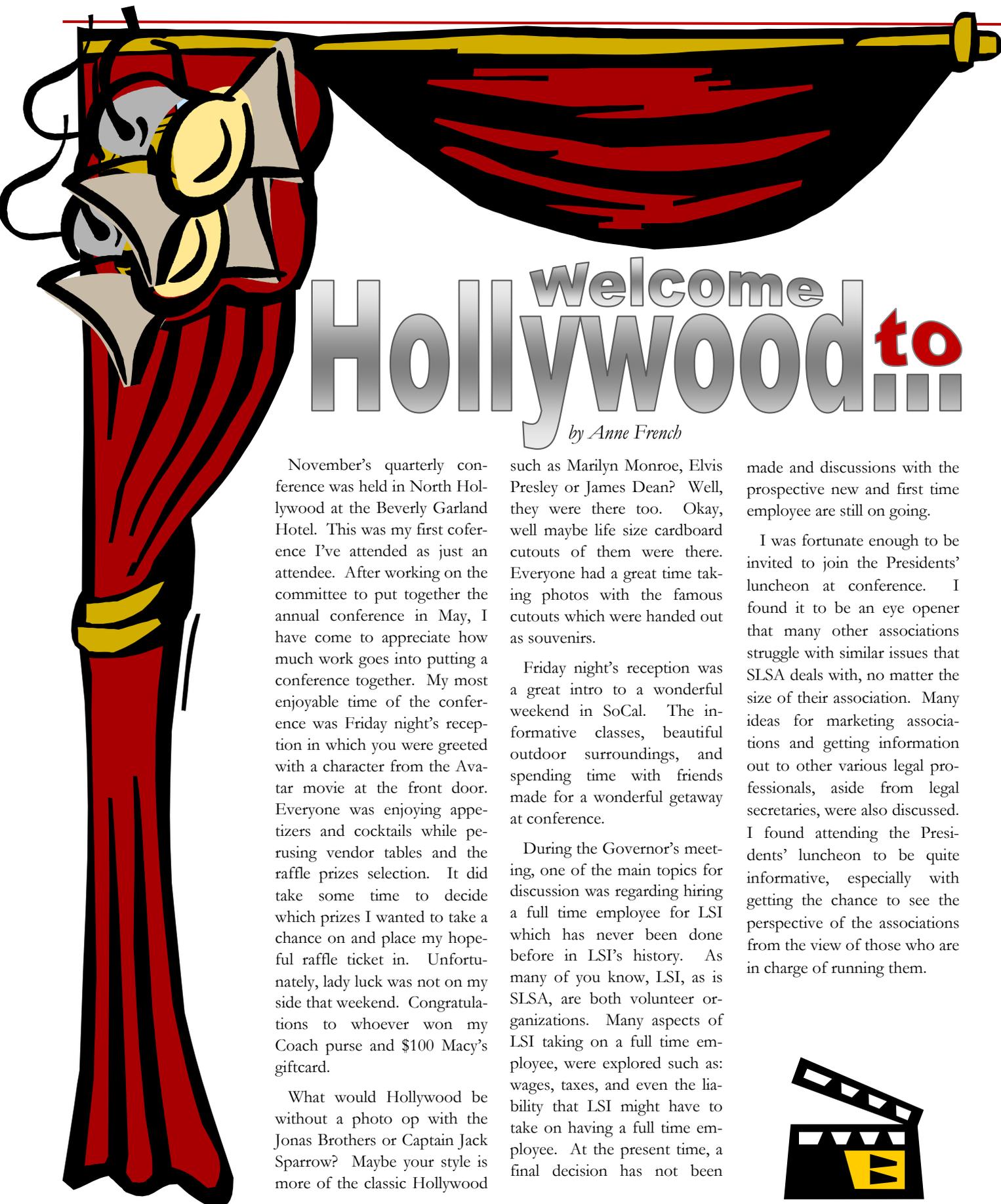
- |                     |             |
|---------------------|-------------|
| Bailiff             | Judge       |
| Plaintiff's Counsel | Court Clerk |
| Defense Counsel     | Bernard     |
| The Great Pumpkin   | Murdoch     |
| The Easter Bunny    | Jurors (6)  |

Please contact Rebecca Lerma  
if you are interested in participating in this  
fun-filled event!

[lemar@gtlaw.com](mailto:lemar@gtlaw.com)

*Make Checks Payable to: SLSA  
and mail to Rosa Deniz  
c/o IAJ, McGeorge School of Law  
3455 Fifth Avenue, Sacramento, CA 95817*





# Welcome Hollywood to

by Anne French

November's quarterly conference was held in North Hollywood at the Beverly Garland Hotel. This was my first conference I've attended as just an attendee. After working on the committee to put together the annual conference in May, I have come to appreciate how much work goes into putting a conference together. My most enjoyable time of the conference was Friday night's reception in which you were greeted with a character from the Avatar movie at the front door. Everyone was enjoying appetizers and cocktails while perusing vendor tables and the raffle prizes selection. It did take some time to decide which prizes I wanted to take a chance on and place my hopeful raffle ticket in. Unfortunately, lady luck was not on my side that weekend. Congratulations to whoever won my Coach purse and \$100 Macy's giftcard.

What would Hollywood be without a photo op with the Jonas Brothers or Captain Jack Sparrow? Maybe your style is more of the classic Hollywood

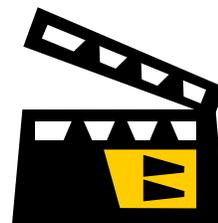
such as Marilyn Monroe, Elvis Presley or James Dean? Well, they were there too. Okay, well maybe life size cardboard cutouts of them were there. Everyone had a great time taking photos with the famous cutouts which were handed out as souvenirs.

Friday night's reception was a great intro to a wonderful weekend in SoCal. The informative classes, beautiful outdoor surroundings, and spending time with friends made for a wonderful getaway at conference.

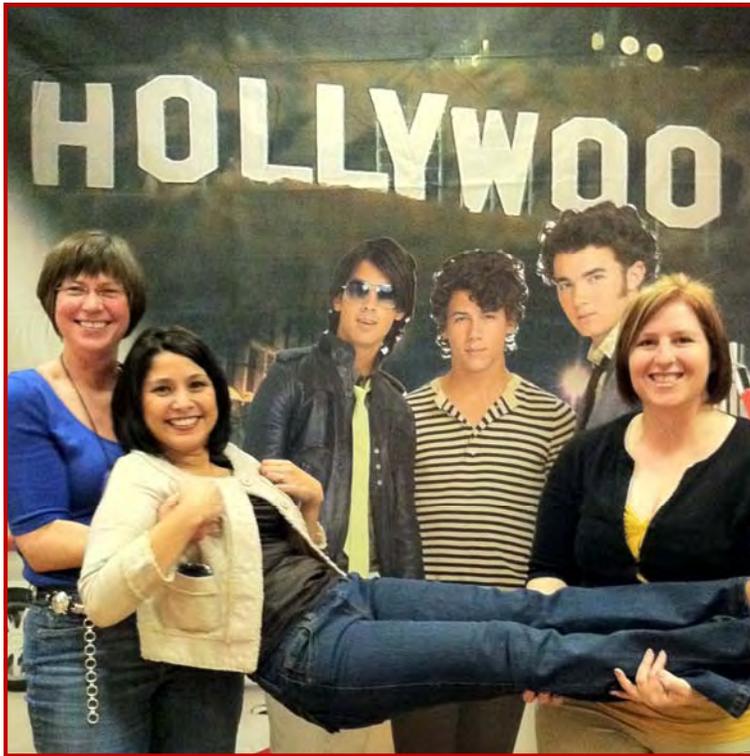
During the Governor's meeting, one of the main topics for discussion was regarding hiring a full time employee for LSI which has never been done before in LSI's history. As many of you know, LSI, as is SLSA, are both volunteer organizations. Many aspects of LSI taking on a full time employee, were explored such as: wages, taxes, and even the liability that LSI might have to take on having a full time employee. At the present time, a final decision has not been

made and discussions with the prospective new and first time employee are still on going.

I was fortunate enough to be invited to join the Presidents' luncheon at conference. I found it to be an eye opener that many other associations struggle with similar issues that SLSA deals with, no matter the size of their association. Many ideas for marketing associations and getting information out to other various legal professionals, aside from legal secretaries, were also discussed. I found attending the Presidents' luncheon to be quite informative, especially with getting the chance to see the perspective of the associations from the view of those who are in charge of running them.



# LSI Quarterly Conference in North Hollywood.



*Pictured from left to right: Sherri Lee Caplette, CCLS, Anne French, and Dawn Forgeur, CCLS*



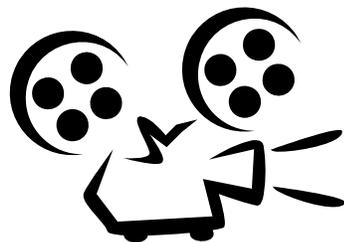
*Pictured from left to right: Anne French, Astrid Watterson, CCLS, and Dawn Forgeur, CCLS*



*Pictured: Sherri Lee Caplette, CCLS*



*Pictured from left to right: Anne French, Vice President, Dawn Forgeur, CCLS, Governor, and Astrid Watterson, CCLS, President*



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# CALIFORNIA COURTS

THE JUDICIAL BRANCH OF CALIFORNIA



- Self-Help Center
- Judicial Council
- Court Administration
- Jury Info
- Invitations to Comment
- Requests for Proposals
- Press Center
- Site Map
- Government Web Sites

## About Our New Site



In an effort to improve online access to the California judicial branch, the California Courts website will unveil a new design in January, 2011.

The California Courts website is home to the award-winning California Online Self-Help Center. The Center provides information and resources for those seeking to resolve legal issues without representation.



## Important Notice: Our Website Address is Changing

In conjunction with the redesign, our website address will be changing to [www.courts.ca.gov](http://www.courts.ca.gov).

There will be an automatic redirect to ensure that any visitor typing our old URL ([www.courtinfo.ca.gov](http://www.courtinfo.ca.gov)) will be redirected to the new address at [www.courts.ca.gov](http://www.courts.ca.gov). This redirect will be in effect indefinitely.

If you or your organization links to or bookmarks content on our existing site, you should plan on updating your links in January.

To prepare, we encourage you to:

1. Conduct an inventory of current links to the [courtinfo.ca.gov](http://courtinfo.ca.gov) site.
2. Once the new site is live, locate your linked content on the new site and update your links/bookmarks with the respective new URLs.

\*For a limited time, we will maintain a link to our old site from our new home page. This is intended to help transition users to the new site and to provide sufficient time to update links and bookmarks.

However, we will not keep content on the old site up to date. The old site will be available for a limited time to help you change links and bookmarks.

# CCLS Quiz Answers

by Jennifer Estabrook, CCLS

## TRIAL PREPARATION

### ANSWERS:

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



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## JURY PREPARATION

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 I I E C F D P C P E W A I P R  
 D D L N Z A A D M X O M F Q S  
 R E G K U M X U N E I P A K J  
 I N Y X E E J U D L I H B L X  
 O C W R T I O B N G D S C U W  
 V E A E C E T I U E A L R A S  
 N I C O J J S Y V E R D I C T  
 I D I T V N R T N E M G D U J  
 X L M Q O U Q X I I O U Z X T  
 S C D I J N F K W M M H N R V  
 E J T R D Y N I D F O C Z P B  
 H O E X P E R T W I T N E S S  
 M P M E I J Q R X O G F Y L U

EVIDENCE

EXPERT WITNESS

IN CAMERA

JUDGMENT

MOTIONS IN LIMINE

PERJURY

SUBPOENA

TESTIMONY

VENUE

VERDICT

VOIR DIRE

# **SAVE THE DATE**

## **SANTA CLARA COUNTY**

### **LEGAL PROFESSIONALS ASSOCIATION**

**Invites You to Its**  
**- 1st Annual -**



**SPECIAL DOOR PRIZE - LIVE DJ - SILENT AUCTION**

**"All You Can Eat" Fresh Cooked Crab  
Pasta, Garlic Bread, Salad & Dessert**

**Saturday, February 12, 2011**



**Social Hour – 6:00 p.m. (No Host Beer/Wine)  
Crab Feast – 7:00 p.m.**



**LOCATION TO BE ANNOUNCED SOON!**

For more information, contact Rod Cardinale at [rodcardinalejr@sbcglobal.net](mailto:rodcardinalejr@sbcglobal.net) or  
Elise Dresser at [edresser@newtonremmel.com](mailto:edresser@newtonremmel.com)

**All proceeds to benefit our local community projects**

# Happy December Birthdays!!



<i>Karen Takao</i>	<i>December 11</i>	<i>Geri Bauer</i>	<i>December 23</i>
<i>Nancy Garcia</i>	<i>December 15</i>	<i>Susan Heaton</i>	<i>December 31</i>
<i>Nola Smith</i>	<i>December 22</i>		



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**APPLICATION FOR MEMBERSHIP IN  
SACRAMENTO LEGAL SECRETARIES ASSOCIATION**

COMPLETE AND DELIVER THE ORIGINAL APPLICATION, WITH CHECK PAYABLE TO SLSA, FOR \$40 (\$25 FOR STUDENTS) WHICH INCLUDES LOCAL DUES, ANY INITIATION FEE, AND LEGAL SECRETARIES, INCORPORATED (LSI)\* PER CAPITA TAX, TO:

**Anne French  
Downey Brand  
621 Capitol Mall, 18<sup>th</sup> Floor  
Sacramento, CA 95814**

NAME OF APPLICANT \_\_\_\_\_  
 EMPLOYER \_\_\_\_\_ POSITION \_\_\_\_\_  
 MAILING ADDRESS \_\_\_\_\_ CITY/ZIP \_\_\_\_\_  
 BUSINESS TELEPHONE (\_\_\_\_) \_\_\_\_\_ RESIDENCE TELEPHONE (\_\_\_\_) \_\_\_\_\_  
 BUSINESS E-MAIL \_\_\_\_\_ RESIDENCE E-MAIL \_\_\_\_\_  
 EMPLOYMENT IN THE LEGAL FIELD (INCLUDE POSITIONS, DATES) \_\_\_\_\_

PREVIOUS MEMBERSHIP IN A LEGAL SECRETARIES ASSOCIATION (INCLUDE ASSOCIATIONS, DATES) \_\_\_\_\_

IF ACCEPTED AS A MEMBER, I AGREE TO BE BOUND BY THE BYLAWS AND STANDING RULES OF LEGAL SECRETARIES, INCORPORATED, AND THE LOCAL ASSOCIATION TO WHICH I HEREBY APPLY FOR MEMBERSHIP, INCLUDING THE FOLLOWING CODE OF ETHICS:

*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 the memory of Joan M. Moore, PLS, CCLS, LSI President 1980-82.)*

SIGNATURE OF APPLICANT \_\_\_\_\_ DATE \_\_\_\_\_

SPONSOR \_\_\_\_\_ APPLICATION APPROVED \_\_\_\_\_

~ ~ **LSI LEGAL SPECIALIZATION SECTIONS MEMBERSHIP** ~ ~

LSI MEMBERS MAY ALSO JOIN ONE OR MORE OF THE FOLLOWING LSI LEGAL SPECIALIZATION SECTIONS:

- ~ CIVIL LITIGATION
- ~ CRIMINAL LAW
- ~ FAMILY LAW
- ~ LAW OFFICE ADMINISTRATION
- ~ PROBATE/ESTATE PLANNING
- ~ TRANSACTIONAL LAW

SPECIALIZATION SECTION MEMBERSHIP INCLUDES: (1) QUARTERLY SECTION NEWSLETTERS; (2) FREE QUARTERLY CONFERENCE WORKSHOPS; (3) REDUCED REGISTRATION FEES FOR REGIONAL SPECIALIZATION SECTIONS SEMINARS; AND, (4) ROSTER LISTING EACH SECTION MEMBER'S NAME, CONTACT INFORMATION, EXPERTISE AND GEOGRAPHICAL AREA WITH WHICH FAMILIAR. SECTION DUES ARE NOMINAL AND A DISCOUNT IS OFFERED FOR MEMBERSHIP IN ALL SIX SECTIONS.

**FOR LSI LEGAL SPECIALIZATION SECTIONS MEMBERSHIP AND DUES INFORMATION, VISIT LSI'S WEBSITE AT [www.lsi.org](http://www.lsi.org); or, TRANSMIT A COPY OF THIS ENTIRE PAGE OF YOUR APPLICATION TO:**

LEGAL SPECIALIZATION SECTIONS COORDINATOR  
 LSI CORPORATE OFFICE  
 P.O. BOX 660  
 FORTUNA, CA 95540-0660  
 FACSIMILE: 707.725.1344 E-MAIL: [lsiorg@suddenlinkmail.com](mailto:lsiorg@suddenlinkmail.com)

(Form adopted 5/01; revised 5/08)

\* ACCOMPANYING MEMBERSHIP IN LEGAL SECRETARIES, INCORPORATED, A CALIFORNIA NON-PROFIT MUTUAL BENEFIT ASSOCIATION, INCLUDES SUBSCRIPTION TO THE LEGAL SECRETARY MAGAZINE, REDUCED ANNUAL DUES FOR MEMBERSHIP IN LEGAL SPECIALIZATION SECTIONS AND DISCOUNTED PRICES ON PURCHASE OF LSI LEGAL PROFESSIONAL'S HANDBOOK AND LAW OFFICE PROCEDURES MANUAL.

SLSA and LSI MEMBERSHIP APPLICATION (continued)

Name: \_\_\_\_\_ Birthday \_\_\_\_\_

Talents, Interests, Hobbies: \_\_\_\_\_

**YOUR SPECIALTY:**

<input type="checkbox"/> Administrative Law	<input type="checkbox"/> Criminal Law	<input type="checkbox"/> Real Estate Law
<input type="checkbox"/> Appellate Law	<input type="checkbox"/> Family Law	<input type="checkbox"/> Taxation
<input type="checkbox"/> Arbitration	<input type="checkbox"/> Law Office Management	<input type="checkbox"/> Other
<input type="checkbox"/> Bankruptcy	<input type="checkbox"/> Litigation	Specify: _____
<input type="checkbox"/> Business/Corporate Law	<input type="checkbox"/> Probate/Estate Planning	_____

**EDUCATION:**

<input type="checkbox"/> High School Diploma	<input type="checkbox"/> Four Year Bachelor's Degree
<input type="checkbox"/> Secretarial Training Course	<input type="checkbox"/> Additional Education Above Four Year Degree
<input type="checkbox"/> Two Year Junior/Business College	

**TYPE OF OFFICE:**

<input type="checkbox"/> Law Office	<input type="checkbox"/> Self-Employed
<input type="checkbox"/> Government Services	<input type="checkbox"/> Corporate Legal Department
<input type="checkbox"/> Court System	<input type="checkbox"/> Other Specify: _____

**BENEFITS PROVIDED BY YOUR EMPLOYER: (Check all that apply)**

<input type="checkbox"/> Retirement/401(k)	<input type="checkbox"/> Major Medical	<input type="checkbox"/> Vacation
<input type="checkbox"/> Disability Income Plan	<input type="checkbox"/> Life Insurance	<input type="checkbox"/> Dental
<input type="checkbox"/> Hospitalization	<input type="checkbox"/> Vision	<input type="checkbox"/> Other
		Specify: _____
		_____

CHECK HERE IF YOUR EMPLOYER PAYS FOR YOUR MEMBERSHIP DUES

CHECK HERE IF YOUR EMPLOYER PAYS FOR MONTHLY DINNER MEETINGS

CHECK HERE IF YOU ARE WILLING TO HOLD A STANDING COMMITTEE CHAIR OR ASSISTANT CHAIR POSITION

WHERE WOULD YOU LIKE YOUR E-MAIL DELIVERED? [ ] BUSINESS [ ] RESIDENCE

SLSA respects your privacy. If you do NOT want to be listed in SLSA's membership roster, check here: [ ]

How did you hear about SLSA? \_\_\_\_\_

Please make your check payable to **SLSA** in the amount of \$40 (\$25 for students). Mail payment with this form to:

**Anne French**  
**Downey Brand**  
**621 Capitol Mall, 18<sup>th</sup> Floor**  
**Sacramento, CA 95814**

*Legal Secretaries, Incorporated*  
**LEGAL SPECIALIZATION SECTIONS**

CIVIL LITIGATION  
CRIMINAL LAW  
FAMILY LAW  
LAW OFFICE ADMINISTRATION  
PROBATE/ESTATE PLANNING  
TRANSACTIONAL LAW



*ARE YOU A MEMBER OF THE LEGAL SPECIALIZATION  
SECTIONS?*

**IF NOT, HERE ARE TEN GREAT REASONS WHY YOU SHOULD  
BECOME A SECTION MEMBER:**

- Reasonable annual dues. (\$20.00 per section; \$75.00 for all six!)
- Continuing Education in all areas of the law.
- Quarterly educational programs -- Free to Section Members.
- Spring Regional Seminar (So. California) and Fall Regional (Northern California) offering a discount on registration fees to section members.
- Quarterly newsletters containing up-to-date information, including changes in the law, new forms, and legal articles.
- Statewide roster of all members in all sections, for easy access to local procedural information in other counties.
- California Certified Legal Secretary®/MCLE/Paralegal CEU credits.
- Networking provides a forum for the exchange of information.
- Respect from employer when you pass on valuable information obtained at workshops and seminars.
- Professional and personal excellence.

*For more information, contact Margaret Tovar, Legal Specialization Sections Coordinator.  
12412 Camilla Street, Whittier, CA 90601; Email: [mtovar@kbblaw.com](mailto:mtovar@kbblaw.com)*

# LEGAL SPECIALIZATION SECTIONS Of LEGAL SECRETARIES, INCORPORATED

## 2009-2010 MEMBERSHIP APPLICATION / ANNUAL RENEWAL FORM

Complete and mail with your check made payable to LSI, for \$20 for each section, or a total fee of \$75 per year to join all SIX sections simultaneously if an LSI Member, or \$40 for each section or a total fee of \$150 per year to join all sections simultaneously if joining as a non-LSI member.

Mail to: **MARGARET TOVAR, CCLS, Legal Specialization Coordinator,**  
12412 Camilla Street, Whittier, CA 90601

Enclosed is payment of my dues for the fiscal year 8/1/09 through 7/31/10 for the following Section(s). Please check appropriate boxes below for the sections you are joining.

**Method of Payment:** Check, payable to "LSI," enclosed  VISA  MASTERCARD   
**Credit Card Information:** Number \_\_\_\_\_ Expiration Date: Month \_\_\_\_\_ Year \_\_\_\_\_  
**Name on Credit Card:** \_\_\_\_\_ **Card Verification Number** \_\_\_\_\_

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.

NEW	RENEWAL	
		Criminal Law
		Family Law
		Law Office Administration
		Litigation
		Probate/Estate Planning
		Transactional Law



(PLEASE PRINT OR TYPE)

NAME: MR./MRS./MS \_\_\_\_\_ PLS/CCLS/CLA/PARALEGAL

ADDRESS/CITY/STATE/ZIP \_\_\_\_\_

LOCAL ASSOCIATION: \_\_\_\_\_ LSA/LPA

RESIDENCE PHONE ( ) \_\_\_\_\_ BUSINESS PHONE: ( ) \_\_\_\_\_

E-MAIL ADDRESS(ES): \_\_\_\_\_

EMPLOYER: \_\_\_\_\_

EMPLOYER'S ADDRESS: \_\_\_\_\_

**PREFERRED MAILING ADDRESS:**  HOME  OFFICE  EMAIL

YEARS OF LEGAL EXPERIENCE: \_\_\_\_\_

SPECIALTY: \_\_\_\_\_

FAMILIAR WITH PRACTICE IN COUNTIES OF (Please indicate each County, not area):

\_\_\_\_\_

**LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM**

ITEM	UNIT PRICE	QUANTITY	TOTAL
<b>BRASS TACKS*</b> A guide instructing local officers and chairmen on how to perform their respective duties. Contains check lists, calendars and forms. (Rev. 5/06)	\$ 5.00		\$
<b>CAREER PROMOTION/SCHOLARSHIP <i>NOT JUST A SECRETARY</i> BOOKLET</b> A 26-page booklet designed to assist local associations in promoting the career of legal secretary. Includes handout materials and an outline for use at career and scholarship promotion events. (Rev. 2/98)	5.00		
<b>CCLS BROCHURE</b> Tri-fold brochure promoting the benefits of taking the CCLS Exam. Includes tear-off to request application form and information kit. (Rev. 2/08)	N/C		
<b>CCLS MOCK EXAM 2006</b> Sample questions and answers to assist in preparing for all sections of the CCLS Exam.	20.00		
<b>CCLS PIN</b> A 1/2" high, 10-karat gold pin with CCLS logo. For the CCLS.	35.00		
<b>CCLS STUDY KIT</b> Contains Mock Exam (see above), Gregg Reference Manual with Basic and Comprehensive Worksheets and Instructor's Resource Manual.	120.00		
<b>GUIDELINES FOR HOSTING LSI CONFERENCES*</b> An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI Conference. (Rev. 2/08)	N/C		
<b>GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM</b> A 34-page guide, with sample forms, to assist with the planning and execution of a successful legal educational program. (Rev. 8/03)	5.00		
<b>HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND GUIDELINES*</b> A booklet with step-by-step directions, including rules and examples, for preparing a History Book for entry in the LSI History Book Competition. Created for local association historians and/or presidents. (Rev. 11/05)	5.00		
<b>HISTORY OF LEGAL SECRETARIES, INCORPORATED</b> A 50-page memory of people, places and events since 1929. (Rev. 2/06)	5.00		
<b>LAW OFFICE PROCEDURES MANUAL FLYER</b> An 8 1/2" x 11" advertisement of the LOPM. Includes listing of contents and Order Form. (Rev. 1/02)	N/C		
<b>LAW OFFICE PROCEDURES MANUAL INSTRUCTOR'S GUIDES</b> 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.			
TEACHER TRAINING CHAPTER (Rev. 9/07)	4.00		
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<b>LEGAL SECRETARY'S REFERENCE GUIDE</b> 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. (Rev. 4/07)	30.00		
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\*Item available to LSI members only

(Prices effective 0508)

**LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM**

ITEM	UNIT PRICE	QUANTITY	TOTAL
<b>LSI BYLAWS AND STANDING RULES*</b> As currently adopted by the LSI Governors.	\$ 5.00		\$
<b>LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER</b> An 8 1/2" x 11" advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/02)	N/C		
<b>LSI LEGAL SPECIALIZATION SECTIONS BROCHURE</b> Lists Sections offered and reasons for joining. Includes Section Membership Application. (Rev. 2/08)	N/C		
<b>LSI MEMBERSHIP BROCHURE</b> Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application (Rev. 2/08)	N/C		
<b>LSI MEMBERSHIP PIN*</b> 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.	3.00		
<b>LSI ROSTER*</b> Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.	N/C		
<b>MEMBERSHIP APPLICATION FORM*</b> An 8 1/2" x 11" form adopted 5/01 by LSI for use by all local associations. Includes request for Legal Specialization Sections information. Local associations may add second-page for supplemental information (Rev. 5/08) Can be transmitted as an e-mail attachment (Word format), if so requested.	N/C	<input type="checkbox"/> E-mail -or- <input type="checkbox"/> Printed	
<b>NEW MEMBER PACKET*</b> A 2-pocket folder containing letter from LSI President, LSI membership information, Specialization Sections Membership Application, list of benefits and providers, CCLS information, Legal Professional's and Law Office Procedures Manual flyer and Code of Ethics. Local associations may insert additional material. For new local association members only.	N/C		
<b>PRESIDENT'S PENDANT*</b> A 1" high oval gold-tone pendant with blue and white enamel overlay. LSI logo in center and "Legal Secretaries Association" inscribed on circumference. Eye for necklace chain on back. For local association presidents.	7.00		
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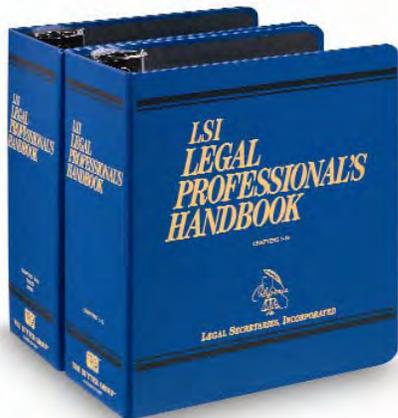
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**LEGAL SECRETARIES, INCORPORATED**

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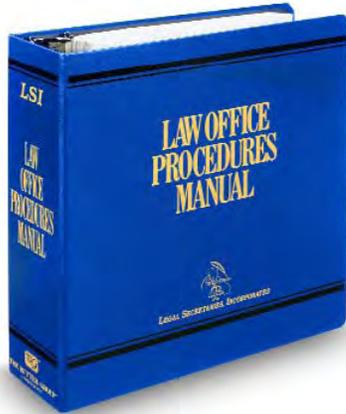


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[paralegalbam@sbcglobal.net](mailto:paralegalbam@sbcglobal.net)

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<b>Total Members (Fiscal Year-end 4/30/10)</b>	<b>Association</b>		<b>New Members</b>	<b>Transfer Members</b>	<b>Continuing Members</b>	<b>Total Members</b>
35	Alameda County	LSA	12	2	27	41
21	Antelope Valley	LSA				0
49	Beverly Hill/Century City	LSA	12		37	49
22	Butte County	LPA	2		16	18
29	Capitol City	LPA	7		21	28
8	Conejo Valley	LPA	1		5	6
22	Desert Palm	LPA	2		13	15
24	El Dorado County	LPA	1		15	16
43	Fresno County	LPA	12		36	48
46	Humboldt County	LPA	8		34	42
30	Imperial County	LPA	4		24	28
35	Livermore-Amador Valley	LPA	3		23	26
55	Long Beach	LSA	4		52	56
34	Los Angeles	LSA	15		24	39
16	Marin County	LPA	2		13	15
35	Merced County	LPA	9		29	38
20	Monterey County	LSA	2		12	14
66	Mt. Diablo	LPA	10		51	61
16	Napa County	LSA			15	15
80	Orange County	LSA	16		49	65
22	Palo Alto	LSA	7		18	25
26	Placer County	LPA	5		34	39
13	Redding	LPA	8		11	19
23	Rio Hondo District	LPA	5		12	17
27	Riverside	LPA	4		16	20
158	Sacramento	LSA	46		118	164
205	San Diego	LSA	58		133	191
60	San Fernando Valley	LSA	6		28	34
46	San Francisco	LPA	6		31	37
30	San Gabriel Valley	LSA	5		16	21
80	San Mateo County	LSA	7		63	70
28	Santa Barbara	LSA	3		20	23
52	Santa Clara County	LSA	12		44	56
20	Santa Cruz County	LPA	1		7	8
23	Santa Maria	LPA	2		12	14
38	Sonoma County	LSA	13		26	39
8	Southern Butte	LSA	3		9	12
37	Stanislaus County	LPA	3		33	36
46	Stockton-San Joaquin	LPA			29	29
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Membership list as of 10/31/10

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**621 Capitol Mall, 18<sup>th</sup> Floor**  
**Sacramento, CA 95814**  
**E-mail: afrench@downeybrand.com**



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by *Liz Gideon*

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Go instead where there  
is no path and leave a  
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