



## Sacramento Legal Secretaries Association

# The Legal Eagle

Book 2013, Issue 12

December 2013

## SLSA Annual Mock Trial



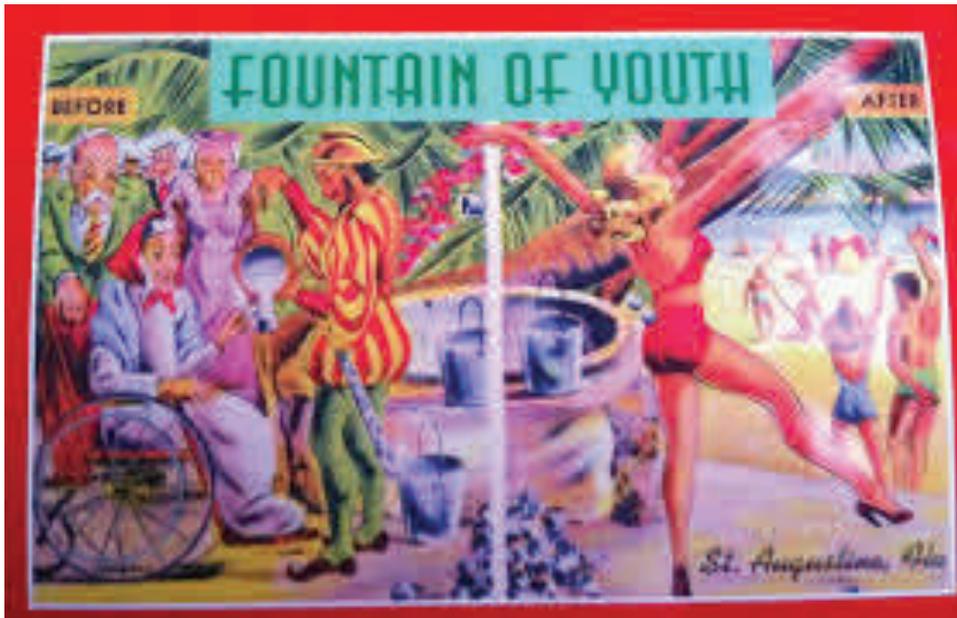
Father Time (aka "Baby Face New Year")

v.

Fountain of Youth, Ltd: Three Coins in the Fountain Blown

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SERVING ON THE EXECUTIVE BOARD:  
WHAT DOES IT TAKE?



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### Annual Holiday Mock Trial and Ornament Exchange

Come and join the fun at our Annual Mock Trial and Ornament Exchange on December 12, 2013, at the Downtown Courtyard Marriott, 4422 Y Street, Sacramento, CA. 6:00 p.m. Appetizers and dessert will be served.

#### President

Lynne Koroush

#### Bulletin Editor

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Sacramento, CA, 95814  
(916) 442-1111



NON-MEMBERS ARE WELCOME!

We're on the Web!  
[www.slsa.org](http://www.slsa.org)

## President's Message: "Your Focus For Winter"



Lynne Koroush, CCLS, President

I'm sure many of us don't think about our gardens during the holidays (unless we have to protect them from a freeze), but there's still plenty of ways to enjoy your garden this time of year. While you're stringing

lights outside your home, why not string some through your dormant rose bushes? Their

bare limbs will look so festive and allow you to enjoy them in a whole new way! Tie some ribbon on your evergreens or hang some fun decorations on them.

While you're at it, trim those overgrown evergreen branches and use some of the nicer ones to make wreaths, swags, and garland to bring the outdoors in. The color and scent will add a nice touch to your décor. Here in California it's not uncommon to still have blooming shrubs and plants in December, so why not use them as well? Late growth in your vegetable garden may produce more leaves than veggies, but those leaves can be a great addition to a fruit or floral centerpiece, especially squash leaves and melon or tomato vines. And, of course, citrus trees provide us with beautiful fruit to enjoy, both as a food source and a bright splash of color on the table. It's amazing how clever and resourceful we can be if we shift our focus and look at things a little differently!

We will be shifting our focus a bit for the December meeting and holding our Annual Holiday Mock Trial and Ornament Exchange. This is a lighter, more fun event, but still very educational. Honorary Member John Baldwin has written another delightfully entertaining mock trial for us. The case of *Father Time (aka "Baby-Face New Year") v. Fountain of Youth, Ltd.*, will be presented on December 12, 2013, at the Courtyard Marriott, located at 4422 Y Street, downtown Sacramento. (Please note that the Mock Trial meeting is being held a week earlier than our regular meeting date.) The case centers around plaintiff's claim for medical damages, alleging that a product manufactured by defendant, advertised as an anti-aging cream made from the waters of the Fountain of Youth, did not perform as promised and resulted in horrific results and injury to plaintiff. The

case will be tried before the Honorable Donna F. Witmey, Judge, and decided by jury verdict. Trust me, you will not want to miss this hilarious presentation and cast of characters! See the flyer in this bulletin for more information.

We will also be stuffing stockings for our holiday charitable project immediately after the mock trial and ornament exchange. The stockings will be stuffed with toiletries, small gifts, candy, gum, socks, hats, gloves, food gift cards, and other much-needed items to be delivered to Loaves & Fishes for the homeless in our area. A more detailed list of items needed can be found on page 4 of this newsletter. Last year, SLSA's goal was 30 stockings, and we surpassed that by filling 55 stockings! Let's do it again! Please bring your donations to the December 12 meeting and help us help those in need this holiday season.

January and February 2014 will see a shift back to more serious educational programs when SLSA presents its two Day in Court events -- the Annual State Court Updates meeting on January 16, 2014, and the Annual Federal Court Updates meeting on February 20, 2014. These are our two most well-attended events, with representatives from Sacramento and surrounding county courts, as well as the appellate and federal courts, discussing changes in the law and what's new in our justice system. Be sure to register and secure your reservation.

Regardless of where your focus lies this winter, or whether you think it might be time to shift your focus and look at things differently, I hope you have a chance to relax and enjoy the unique gifts of this season.

Happy Holidays to You and Yours!

--Lynne





Sacramento Legal Secretaries Association's  
**Annual Holiday Mock Trial**

**Father Time (aka "Baby Face New Year")  
v. Fountain of Youth, Ltd: Three Coins in the  
Fountain Blown**

**Vendor of the Month: Simply CPR**

Date: December 12, 2013  
Time: 6:00 PM  
Location: Courtyard Marriott, 4422 Y Street, Sacramento  
Cost: \$20 for Members; \$23 for Non-Members  
Meal: Assorted Appetizers & Desserts  
RSVP By: 12:00 Noon on Friday, December 6, 2013



**Ornament Exchange!**

Bring one gift-wrapped ornament (under \$10) to participate in the ornament exchange. *(Immediately following the Mock Trial)*



**Make checks payable to "SLSA," and mail to:**  
Paula Lockard, CCLS, Registration/Reception Chair 2013-2014  
c/o Sacramento City Attorney's Office  
915 "I" Street, 4th Floor  
Sacramento, CA 95814

You may also register via e-mail at [reservations@slsa.org](mailto:reservations@slsa.org), or through our website at [www.slsa.org](http://www.slsa.org) under Upcoming Events.

Cancellations must be received 48 hours in advance for a refund. No-Shows will be billed. Walk-ins and registrations received after the RSVP deadline are subject to a \$5 late fee.

MCLE & CCLS Credit: SLSA, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 0.5 hours.

## SLSA'S DECEMBER CHARITABLE PROJECT

SLSA is again participating in the Sacramento Loaves & Fishes Christmas Stocking Giveaway.

Let's try to fill at least 30 stockings this year!



We are looking for the following items:

- New or gently used Christmas Stockings
- McDonald's \$5 Gift Certificate(s)
- New socks, one size fits all
- Stretch/knit hat, gloves and scarves
- Travel-size toiletry items (lotions, Vaseline, conditioners, shampoos, soap, hand sanitizer)
- Disposable razors (adult stockings only)
- Deodorant
- Chapstick
- Toothbrush and toothpaste
- Decks of cards
- Gum
- Shoelaces
- Hand Warmers
- Feminine products

*We are also looking for items specific to children.*

Donations of filled Christmas stockings OR items to put in the stockings can be brought to SLSA's December 12 Mock Trial. If you're unable to attend the December Mock Trial but have items to donate for the stockings, please contact any of the Charitable Projects Committee Chairs to make other arrangements.

**Deadline for SLSA to drop off donated stockings is December 20.**

**A BIG THANKS for your support of SLSA's charitable projects!**

Rebecca Lerma, Chair [mlerma@stoel.com](mailto:mlerma@stoel.com); (916) 319-4790  
Crystal Rivera, Co-Chair [crivera@somachlaw.com](mailto:crivera@somachlaw.com); (916) 469-3813  
Connie Kelley, Co-Chair [kellyco@gtlaw.com](mailto:kellyco@gtlaw.com); (916) 442-1111



**SLSA November 21, 2013 Dinner Meeting**



Ann Edwards, Ana Marie Sotuela and Lucia Ruiz



Lois Navarrot, Jamie Brandt, and Dana Reeder



Diana Parada & Karla Simmons



Registration Chair, Paula Lockard, CCLS



Kelley Taber, Esq.

## Serving on the Executive Board: What Does It Take?



Recently, each member of SLSA's Executive Board was asked to provide some insight into their position and share their thoughts with you about serving as an officer. Below are some of the responses; others will be published in the next issue.

### **Maryanna Rickner – SLSA Treasurer**

#### **What do you see as the main duties of the Treasurer?**

My main duty is to account for SLSA's receipts and disbursements to maintain balanced accounts. From these accounts, I compile the monthly Treasurer's Report that provides the Board and membership with an account of SLSA's receipts and disbursements from the previous month. The report is then presented at the Board and dinner meetings. I keep the President apprised of all deposits and disbursements that are made on SLSA's behalf. I also provide the President with the monthly bank statements for all accounts. I assist the Vice President with tracking new memberships, renewals, and changes to members' contact information. I report this information in the monthly Per Capita Report to the LSI Treasurer. Additionally, I coordinate the exchange of receipts from all SLSA's events with the appropriate SLSA chairpersons, prepare and file the annual IRS Tax Form 990-N, and verify the filing with the LSI Treasurer.

#### **What you do on a daily basis for SLSA as an officer (or regular basis if not daily)?**

My duties are not necessarily on a "daily" basis, as much as on an "as needed" basis. The volume of work is dependent on the allotted tasks scheduled at certain times of the year and the number of events taking place within a given month. For example, the beginning of the new fiscal year can be somewhat time-intensive due to the receipt of membership renewals.

#### **How much time you spend daily/weekly fulfilling your duties?**

I spend an average of 8-16 hours per week on my duties.

#### **What do you (or someone thinking about running for your office) need to know in order to do the job?**

Experience with QuickBooks and Excel is not necessary but helpful and skills for accounting and creating the required reports can be learned.

#### **What do you enjoy most about serving in your position?**

I enjoy interacting with legal professionals from many different legal backgrounds at the various SLSA events and LSI Conferences, and contributing my services to an organization whose mission I strongly believe in.

### **Lynne Koroush – SLSA President**

#### **What do you see as the main duties of the President?**

The main duty of the president is to preside over all regular membership meetings and Executive Board meetings of the association, and appoints all appointive officers and chairmen. I work closely with all members of the Executive Board and SLSA's committee chairmen to make sure that the objectives of each position are carried out and they receive the support they need. Basically, I am the general "go-to person" for the association and expected to be able to respond to most questions or issues that arise.

*(Continued on page 7)*

*(Continued from page 6)*

**What you do on a daily basis for SLSA as an officer (or regular basis if not daily)?**

On a daily basis I deal with a lot of e-mail, either generated by me or received from others. I am in regular contact with the other Executive Board members, as well as various committee chairmen of the association. On a regular basis, I put together the agenda for the Executive Board meetings and the regular membership meetings, write articles for the monthly bulletin, assist with the final draft and review of the monthly bulletin, prepare and send e-blasts/notices to the membership as needed, respond to LSI directives, attend LSI Quarterly Conferences and Annual Conference as needed, and delegate duties to the appropriate officers and chairmen to be handled as they arise.

**How much time you spend daily/weekly fulfilling your duties?**

I spend an average of 8-10 hours per week on my duties. This will vary throughout the year, depending on what is happening with the association.

**What do you (or someone thinking about running for your office) need to know in order to do the job?**

Knowledge of SLSA and experience serving on SLSA's Executive Board is very important. Our bylaws state that a member cannot serve as president without having served as an officer of this association for one year. I believe serving for longer than one year, and in various offices, is the best training for someone who aspires to serve as president. You must have time in your life, both personally and professionally, to dedicate to serving as president. There are times when being president means that you must handle issues or questions during business hours, and having an employer who provides you the flexibility to do that is a tremendous blessing! Having the support and understanding of your family is also a must. The president needs a good understanding of parliamentary procedure and needs to know SLSA's bylaws and standing rules. Having a servant's heart, possessing good people skills, being diplomatic and open-minded, having the ability to remain impartial, being a good listener as well as a good decision-maker, and leading with both strength and humility

are very desirable traits for serving as president.

**What do you enjoy most about serving in your position?**

What I enjoy most is knowing that, together with the Executive Board members and committee chairmen, I am making a positive difference and impact on this association that truly benefits our members, furthers our goals of professional excellence and education, and honors the legacy of those who served before me.

**Lynne Koroush – Former SLSA Vice President**

**What do you see as the main duties of the Vice President?**

The vice president is the membership chair for the association as well as the marketing chair. The vice president receives, reviews, and processes all new member applications and makes recommendations to the Executive Board regarding membership acceptance. The person in this position maintains the membership records of the association, and inducts new members approved by the association. The vice president maintains marketing materials for the association, sets up the marketing table at all SLSA meetings and events, and occasionally markets the association to other organizations, schools, or persons associated with the legal profession. The vice president works very closely with the treasurer for per capita reporting purposes. The vice president also works very closely with the president, as this person serves as second-in-command and must be prepared to preside over the association in the absence of the president.

**What you do on a daily basis for SLSA as an officer (or regular basis if not daily)?**

On a regular basis the vice president handles membership applications, responds to inquiries regarding membership, communicates with potential members, assembles and distributes membership packets to new inductees, initiates inductees at meetings, maintains/updates the membership records/spreadsheet, submits articles related to member news in the monthly bulletin, orders and maintains marketing materials, and attends LSI quarterly conferences and annual conference as needed.

*(Continued on page 8)*

(Continued from page 7)

**How much time you spend daily/weekly fulfilling your duties?**

I spent an average of 4-8 hours per week on my duties, depending on what was happening with the association. The initial ramp-up period as vice president required more time than usual, since this was a learning period as well as the beginning of the fiscal year (which involved membership renewals, per capita, etc.).

**What do you (or someone thinking about running for your office) need to know in order to do the job?**

Knowledge of SLSA and experience serving on SLSA's Executive Board is very helpful. Previous service as the treasurer would be extremely helpful. You should be willing to move up to the presidency

and be prepared to assume that office in the event of an emergency. Just as with the office of president, you need to have time in your life to dedicate to volunteer leadership. A supportive employer and family is essential. The vice president needs a good understanding of parliamentary procedure and SLSA's bylaws and standing rules. Being organized and having good follow-through skills is a must. The vice president is often the first person in SLSA that a potential member comes into contact with, so being a "people person" and not being afraid to speak in front of people is very helpful for this position.

**What do you enjoy most about serving in your position?**

I enjoyed being vice president because I had a great deal of personal contact with the members. This helped me tremendously when I became president and was able to recall names and details about members.

**December Birthdays**

Many happy returns to the following SLSA members who celebrate December birthdays!

Stephanie Laurence	Dec. 3
Linda Gerst	Dec. 8
Debbie Jordan	Dec. 10
Janice Reed	Dec. 11
Karen Takao	Dec. 11
Angela Grijalva	Dec. 13
Serena Albaeck	Dec. 14
Sally Eredia	Dec. 18
Margie Fair	Dec. 19
Geri Bauer	Dec. 23
Benjamin Harrell	Dec. 28





Sacramento Legal Secretaries Association  
A Member of Legal Secretaries, Incorporated  
Proudly Presents

**COURT UPDATES 2014**

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

**EXHIBITORS!!!**

**DOOR PRIZES!!!**

**THURSDAY, JANUARY 16, 2014**

No-Host Bar: 4:45 p.m. to 6:45 p.m.

Dinner: 6:15 p.m.

**Cost: SLSA Members: \$40 before January 6, 2014 (add \$5 after**

**January 6, 2014**

**Non-Members: \$45 before January 6, 2014 (add \$5 after**

**January 6, 2014**

**SLSA has gone green!**  
Each attendee will receive  
a CD containing the  
speakers' handouts.

**Cancellations must be made 72 hours in advance for a refund. No-shows will be billed!!**

Location: HILTON — SACRAMENTO ARDEN WEST LOCATION  
2200 Harvard Street (located at Business 80 and Arden Way West) Sacramento  
*Parking will be validated for all attendees*

**Speakers: Court Clerks/Executive Officers from numerous counties.**

Day In Court Chairs: Deseree Gamayo ([dgamayo@stonegraves.com](mailto:dgamayo@stonegraves.com)) Phone: 916-231-0321  
Crystal Rivera ([crivera@somachlaw.com](mailto:crivera@somachlaw.com)) Phone: 916-469-3813  
Kim Smith ([smithkim@gtlaw.com](mailto:smithkim@gtlaw.com)) Phone: 916-868-0646

Please mail or email your registration form with your check, or you may register online at [www.slsa.org/events](http://www.slsa.org/events).

Name: \_\_\_\_\_ CCLS? Yes \_\_\_ No \_\_\_  
Address: \_\_\_\_\_ MCLE? Yes \_\_\_ No \_\_\_  
Phone Number: \_\_\_\_\_  
E-Mail: \_\_\_\_\_

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 , entrée, dessert, coffee/tea. Please indicate your meal preference:**

- \_\_\_\_\_ Spice Crusted Tri-Tip with Smokey Whiskey Reduction, Herb Roasted Red Potatoes, Fresh Vegetables
- \_\_\_\_\_ Chicken Rosemary – Seared Chicken Breast with Natural Garlic Au Jus and Lemon slices, Herb Roasted Red Potatoes, Fresh Vegetable Du Jour
- \_\_\_\_\_ Stuffed Manicotti with Creamed Spinach and Two Cheeses, Ribboned with Pesto Cream Sauce & Marinara

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

**Mail Registration and Check (made payable to SLSA) to:**

Paula Lockard, CCLS,  
Registration/Reception Chair 2013-2014  
c/o Sacramento City Attorney's Office  
915 "P" Street, 4th Floor  
Sacramento, CA 95814  
**E-mail: [reservations@slsa.org](mailto:reservations@slsa.org)**

If you cannot attend this event, but are interested in membership, please contact President Lynne Koroush, [koroushl@gtlaw.com](mailto:koroushl@gtlaw.com).

SLSA, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California and California Certified Legal Secretary credit in the amount of at least 1.0 hours.



# Sacramento Legal Secretaries Association

A Member of Legal Secretaries, Incorporated  
Proudly Presents



## FEDERAL DAY IN COURT 2014

with guest speakers from the U.S.D.C., Eastern District

***EXHIBITORS!!!***

***DOOR PRIZES!!!***

**THURSDAY, February 20, 2014**

No-Host Bar: 4:45 p.m. to 6:45 p.m.

Dinner: 6:15 p.m.

**Cost: SLSA Members: \$40 before February 7, 2014 (add \$5 after February 7, 2014)**

**Non-Members: \$45 before February 7, 2014 (add \$5 after February 7, 2014)**

**Cancellations must be made 72 hours in advance for a refund. No-shows will be billed.**

Location: HILTON — SACRAMENTO ARDEN WEST LOCATION  
2200 Harvard Street (located at Business 80 and Arden Way West) Sacramento  
*Parking will be validated for all attendees*

Deseree Gamayo ([dgamayo@stonegraves.com](mailto:dgamayo@stonegraves.com)) Phone: 916-231-0321

Day In Court Chairs: Crystal Rivera ([crivera@somachlaw.com](mailto:crivera@somachlaw.com)) Phone: 916-469-3813

Kim Smith ([smithkim@gtlaw.com](mailto:smithkim@gtlaw.com)) Phone: 916-868-0646

Please mail or email your registration form with your check or you may register online at [www.slsa.org/events](http://www.slsa.org/events).

Name: \_\_\_\_\_ CCLS? Yes \_\_\_ No \_\_\_

Address: \_\_\_\_\_ MCLE? Yes \_\_\_ No \_\_\_

Phone Number: \_\_\_\_\_

E-Mail: \_\_\_\_\_

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, entrée, dessert, coffee/tea. Please indicate your meal preference:**

\_\_\_\_\_ Flank Steak with Mushroom Demi Garlic Mashed Potatoes Chefs Fresh Vegetable Du Jour

\_\_\_\_\_ Grilled Vegetable Wellington Chefs fresh Vegetable Du Jour

\_\_\_\_\_ Chicken Bruschetta Grilled Chicken Breast with Basil Crème gapers and Artichoke Hearts Garlic Mashed Potatoes Chefs Fresh Vegetable Du Jour

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

**Mail Registration and Check (made payable to SLSA) to:**

Paula Lockard, CCLS

Registration/Reception Chair 2013-2014

c/o Sacramento City Attorney's Office

915 "P" Street, 4th Floor

Sacramento, CA 95814

E-mail: [reservations@slsa.org](mailto:reservations@slsa.org)

If you cannot attend this event, but are interested in membership, please contact President Lynne Koroush, [koroushl@gtlaw.com](mailto:koroushl@gtlaw.com).

SLSA, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California and California Certified Legal Secretary credit in the amount of at least 1.0 hours.

Submitted by Lynne Koroush, CCLS



Kelley Taber, Esq. and Lynne Koroush, CCLS

The speaker for our November 21, 2013, meeting was Kelley Taber of Somach Simmons & Dunn. She spoke on the California Environmental Quality Act (CEQA).

The California Environmental Quality Act is one of California’s most important environmental laws, and applies to most public agency decisions to approve actions that could have adverse environmental effects. Ms. Taber stated that CEQA can be a source of expensive and time-consuming litigation. The purpose of CEQA is to promote informed decision-making, and requires agencies to consider environmental effects of projects they approve, fund, or carry out, and to reduce or avoid significant environmental effects.

The CEQA process involves: 1) preparation of the draft document; 2) circulation of the draft document for public review and comment; 3) responses to public comments; 4) agency CEQA determination and approval of project; and 5) filing of Notice of Determination. Notices of Exemption, Negative Declarations, and Environmental Impact Reports (EIR) are all examples of CEQA documents. Many CEQA documents can be found on the State’s website at: [http://opr.ca.gov/m\\_stateclearinghouse.php](http://opr.ca.gov/m_stateclearinghouse.php).

Ms. Taber stated that the attorney’s role in the CEQA process is to:

- Assist project applicant in administrative process.
- Ensure agency procedural compliance with statutory requirements.
- Ensure accurate and thorough administrative record.
- Assist public agency with compliance in reviewing project proposal.
- Represent persons or organizations opposed to or seeking modifications to proposed project.
- File litigation challenging approval.
- Defend against challenges to approvals.

The legal staff’s role in the CEQA process, therefore, is to:

- Assist attorney in submitting evidence supporting or challenging agency approval.
- Understanding special rules regarding citations to evidence:
  - Specific URL required.
  - If submitting documents, must identify where in documents key information relevant to arguments can be found, etc.
- File and defend against CEQA litigation:
  - Unique procedural requirements for writ litigation.
  - Unique deadlines throughout the action (see Public Resources Code, §§ 21167-21167.10).

CEQA litigation Commences with the filing of a Petition for Writ of Mandate. There are

*(Continued on page 12)*

*(Continued from page 11)*

statutory pre-filing requirements, and notice must be provided to the lead agency of intent to sue. The petition should be filed in the Superior Court of the county where the lead agency is located or where the project (or part of the project) being challenged will occur. Every county Superior Court should have designated CEQA judges, and those courts usually have their own CEQA local rules.

Unlike normal civil litigation, CEQA litigation has short statutes of limitations, generally 30-180 days. The limitations period runs from the date of the agency's post-approval filing of the Notice of Determination (at the County Clerk's office). No discovery is conducted, and decisions are based on the administrative record. Also, there is no trial – the Judge decides based on review of the administrative record, briefs, and/or the hearing on the merits.

Ms. Taber stated that the administrative record, therefore, becomes one of the most important elements in the litigation of CEQA matters. The petitioner must serve a request for preparation of the record of proceedings (administrative record) on the respondent public agency within 10 days after the petition is filed. The request must be filed with the petition or the complaint. The time limit to prepare the administrative record is 60 days, but may be extended upon the stipulation of all parties.

The administrative record is the basis for judicial determination of adequacy of the agency decision. The contents of the administrative record are specified in Public Resources Code section 21167.6, and must consist of the entire written record before the agency at time of project approval. Court rules may dictate the form of preparation (see Cal. Rules of Court, rule 3.1365 or local rules) and submission (paper/electronic). The administrative record

must be lodged with the court.

The Petitioner or respondent (or Real Party in Interest) may prepare the administrative record, and must be submitted 60 days from the date of the filing of the petition. Ms. Taber emphasized that the cost of preparation of the administrative record, as well as keeping records of time spent in the preparation of the administrative record, should be kept for future reimbursement.

CEQA hearings must be requested within 90 days of filing the petition, and should follow the court's procedural steps for setting the hearing and briefing schedule. Ms. Taber stated that for briefing purposes, many judges are requesting that hyperlinks to citations in the brief be included, as well as to citations to excerpts of the administrative record. Decisions in CEQA cases are generally issued via a Statement of Decision, Judgment, Peremptory Writ of Mandate, or Return of Peremptory Writ.

Ms. Taber concluded by stating that CEQA is an area of law that touches most people at some point in their lives due to the widespread effect and nature of its impact on the environment and environmental process.

We are very grateful to Ms. Taber for helping us understand more about this very important area of law and its growing impact on society and the legal profession.





Submitted by Launa Atkinson, CCLS

## CCLS Quiz

### True or False?

1. \_\_\_\_\_ Supra is used as an informational cue that the source will be cited later.
2. \_\_\_\_\_ A deponent is one who appears as a witness in court.
3. \_\_\_\_\_ To subrogate is to substitute one person for another.
4. \_\_\_\_\_ A stipulation is an agreement between opposing parties in a pending action.
5. \_\_\_\_\_ A person who is clear thinking is said to be “non compos mentis.”
6. \_\_\_\_\_ A chattel mortgage refers to a method of purchasing livestock.
7. \_\_\_\_\_ A new employee of your firm is awaiting the results of his bar exam, and one of his assignments has been to assist the senior partner in preparing a motion for filing with the Court. You should insert his or her name along with that of the partner as the preparing party.
8. \_\_\_\_\_ In citations abbreviate all states and territories.
9. \_\_\_\_\_ “Locus Sigilli” means in a previous location.
10. \_\_\_\_\_ The term replevin refers to a proceeding to recover possession of unlawfully held personal property.

## CCLS Vocabulary

1. Ex post facto: after the deed (is done)
2. Infra: below
3. Loco citato (loc. cit): in the place cited
4. Supersedeas: that you supersede (writ for stay)
5. Ad infinitum: indefinitely; forever
6. Ante bellum: before the war
7. Corpus delicti: body of the offense; essence of the crime
8. Ibidem (ibid.): in the same place
9. In loco parentis: in the place of a parent
10. Quod erat demonstratum (Q.E.D.): which was to be demonstrated

**Please note that the RSVP deadline for all regular monthly meetings is now Noon on the Friday before the meeting.** We have had to move our RSVP cut-off date in order to meet food ordering deadlines from the Courtyard Marriott. Please make note of it, as this is now SLISA’s standard reservation deadline for regular dinner meetings.

### Please Keep In Your Thoughts

- Please keep our dear friend and LSI Past President, Mary Rocca, CCLS, in your thoughts and prayers. Mary was recently diagnosed with breast cancer and would welcome your encouraging words of support. Please mail to: Mary S. Rocca, CCLS, 1309 Regent Street, Alameda, CA 94501-4627.
- Our heartfelt condolences to the family and friends of SLSA member and vendor partner Jeff Schuitema. Jeff passed away on November 6, 2013, and was the owner of Legalese Attorney Service in Sacramento. Condolences may be sent to Jeff's long-time girlfriend, Lisa Lavy, at 1754 -36th Street, Sacramento, CA 95816-6613.

### Congratulations to SLSA's Newest CCLSeS!!

Huge congratulations to Heather Rodriguez and Lynne Koroush on passing the CCLS examination, given on October 19, 2013! LSI President Sandra Jimenez, CCLS, congratulated them, saying:

“Taking and passing the exam is a tremendous accomplishment -- and you did it! I truly believe in the purpose of our CCLS program -- to assist members to achieve a higher status of knowledge and skill through education to significantly aid in the performance of duties and responsibilities as legal professionals. I believe that you will definitely grow and benefit personally and professionally from this . . .”



A total of 41 people statewide sat for the October examination, with 19 successfully passing all seven sections. Heather and Lynne will be officially honored and recognized at LSI's May 2014 Annual Conference in Concord.

## Nominations and Elections Committee Report: Nominations for 2014-2015

SLSA Members,

On behalf of the Nominations and Elections Committee, I would like to remind you that SLSA will soon begin taking nominations for the 2014-2015 fiscal year. In March, which will be here sooner than you think, we will elect the new board members. Now is the time to consider serving the association through volunteer leadership on the Executive Board. If you are interested in becoming involved, be sure to let us know so that we can add you to the ballot. Nominations will be accepted for the offices of: President; Vice President; Secretary; Treasurer; Governor; and Delegates (3).

Please keep in mind that a nominee for the office of President must have served at least one year as an elected officer of this association. All other positions are open to any member in good standing. In January, letters will be sent to all SLSA members requesting nominations and will include detailed job descriptions for each office. In the meantime, should you wish to add your name to the list, please let us know.

Thank you.

Jaymie Moralez, Nominations & Elections Chair ([jmoralez@somachlaw.com](mailto:jmoralez@somachlaw.com))

Crystal Rivera, Nominations & Elections Committee Member ([crivera@somachlaw.com](mailto:crivera@somachlaw.com))

Astrid Watterson, CCLS, Nominations & Elections Committee Member ([awatterson@somachlaw.com](mailto:awatterson@somachlaw.com))

# California Certified Legal Secretary

A Program of  
Legal Secretaries, Incorporated



## APPLICATION

Please complete and mail this form to the following address with your check to reserve your place at one of the examination venues:

**CCLS Certifying Board  
14403 Leibacher Avenue  
Norwalk, CA 90650**

<input type="checkbox"/> Northern California	<input type="checkbox"/> Saturday, October 19, 2013
<input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, March 15, 2014

Deadline: Application must be received 60 days prior to examination date. A late application *may* be accepted up to 30 days prior to the examination if submitted with a \$30 late fee, in addition to the fees listed below, *if space is available*.

EXAMINATION FEES*			
LSI MEMBERS**		Non-LSI MEMBERS	
Registration fee:	\$ 25.00	Registration fee:	\$ 75.00
Examination fee:	<u>\$ 100.00</u>	Examination fee:	<u>\$ 100.00</u>
Total	\$125.00	Total	\$175.00

Enclosed is a check in the sum of \$ \_\_\_\_\_<sup>\*\*\*</sup>, payable to LSI.

\* Fees subject to change without notice.

\*\* LSI members: Name of local association: \_\_\_\_\_ LSA/LPA.  
**Please enclose a photocopy of your local membership card.**  
You must be a member upon application to be eligible for reduced fees.

\*\*\* Include \$30 late fee if applicable.

Name \_\_\_\_\_ Last 4 Digits of SSN \_\_\_\_\_

Mailing Address: \_\_\_\_\_

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

Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

E-mail(s): \_\_\_\_\_

Highest level of formal education completed: \_\_\_\_\_; Highest Degree: \_\_\_\_\_.

EMPLOYMENT RECORD: Please list legal secretarial employment, beginning with your most recent (or current) employment, to show a minimum of two full years of such employment. Attach a supplemental page if additional entries are necessary to show two full years of employment as a legal secretary.

Dates \_\_\_\_\_ Position \_\_\_\_\_

Employer \_\_\_\_\_

Address \_\_\_\_\_

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

Supervisor \_\_\_\_\_ Phone \_\_\_\_\_

Summary of Duties \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Dates \_\_\_\_\_ Position \_\_\_\_\_

Employer \_\_\_\_\_

Address \_\_\_\_\_

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

Supervisor \_\_\_\_\_ Phone \_\_\_\_\_

Summary of Duties \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

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

COMPLETE AND DELIVER THE ORIGINAL APPLICATION, WITH CHECK PAYABLE TO "SLSA" (see membership category and dues information below), TO:

**Maryanna Rickner, Treasurer  
Sacramento Legal Secretaries Association  
c/o Sacramento County Office of Education  
P. O. Box 269003, Sacramento, CA 95826-9003**

NAME OF APPLICANT \_\_\_\_\_ ARE YOU A CCLS?  YES  NO  
EMPLOYER \_\_\_\_\_ POSITION \_\_\_\_\_  
BUSINESS ADDRESS \_\_\_\_\_ CITY/ZIP \_\_\_\_\_  
BUSINESS PHONE \_\_\_\_\_ BUSINESS E-MAIL \_\_\_\_\_  
RESIDENCE ADDRESS \_\_\_\_\_ CITY/ZIP \_\_\_\_\_  
RESIDENCE PHONE \_\_\_\_\_ 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 (IF ANY) \_\_\_\_\_ APPLICATION APPROVED \_\_\_\_\_

**SLSA MEMBERSHIP CATEGORIES/ANNUAL DUES (Check One)**

**ACTIVE MEMBER\* (Annual Dues \$40):** Persons currently engaged in work of a legal nature with at least one year's experience as a legal professional, including persons licensed to practice law, persons working in the office of an attorney licensed to practice law in this state, or in the courts of this state, trust departments of banks or trust companies, or in any other institution or office directly engaged in work of a legal nature, including the public offices of the United States government, state, cities, counties or municipalities. *Dues include local dues, any initiation fee, and Legal Secretaries, Incorporated (LSI) per capita tax.*

**STUDENT MEMBER\*\* (Annual Dues \$25):** Persons currently enrolled in an educational program with emphasis on legal studies; persons currently engaged in work of a legal nature who possess less than one year's experience a legal professional. Upon completion of one year of employment as a legal professional, Student Members may become Active Members with all the rights and obligations of such membership. *Dues do not include LSI per capita tax.*

**ASSOCIATE MEMBER\*\* (Annual Dues \$25):** Persons interested in the legal profession who possess no legal experience; legal professionals who are presently unemployed. Associate Members may retain such status for two (2) years only. Upon meeting the conditions of active membership, Associate Members may become Active Members with all the rights and obligations of such membership. *Dues do not include LSI per capita tax.*

\* ACTIVE MEMBERSHIP IN SLSA INCLUDES MEMBERSHIP IN LEGAL SECRETARIES, INCORPORATED (LSI), AND ALL BENEFITS OF MEMBERSHIP IN LSI AND SLSA. ACTIVE MEMBERS MAY VOTE, SERVE ON COMMITTEES, AND BE ELECTED TO OFFICE.

\*\* STUDENT/ASSOCIATE MEMBERSHIP IN SLSA DOES NOT INCLUDE MEMBERSHIP IN LSI. STUDENT/ASSOCIATE MEMBERS MAY NOT VOTE AND MAY NOT BE ELECTED TO OFFICE. STUDENT/ASSOCIATE MEMBERS MAY SERVE ON COMMITTEES.

SLSA MEMBERSHIP APPLICATION (continued)

Name: \_\_\_\_\_ Birthday (MO/DAY) \_\_\_\_\_

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

**YOUR SPECIALTY:**

_____ Administrative Law	_____ Criminal Law	_____ Real Estate Law
_____ Appellate Law	_____ Family Law	_____ Taxation
_____ Arbitration	_____ Law Office Management	_____ Other
_____ Bankruptcy	_____ Litigation	Specify: _____
_____ Business/Corporate Law	_____ Probate/Estate Planning	_____

**EDUCATION:**

_____ High School Diploma	_____ Four-Year Bachelor's Degree
_____ Secretarial Training Course	_____ Additional Education Above Four-Year Degree
_____ Two-Year Junior/Business College	

**TYPE OF OFFICE:**

_____ Law Office	_____ Self-Employed
_____ Government Services	_____ Corporate Legal Department
_____ Court System	_____ Other (Specify): _____

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

_____ Retirement/401(k)	_____ Major Medical	_____ Vacation
_____ Disability Income Plan	_____ Life Insurance	_____ Dental
_____ Hospitalization	_____ Vision	_____ 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**

**E-MAIL PREFERENCE?**                    [ ] **BUSINESS**        [ ] **RESIDENCE**

**REGULAR MAIL PREFERENCE?**    [ ] **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**. Mail payment with this form to:

Maryanna Rickner, Treasurer  
Sacramento Legal Secretaries Association  
c/o Sacramento County Office of Education  
P. O. Box 269003  
Sacramento, CA 95826-9003



**Sacramento Legal Secretaries Association  
Membership Renewal Invoice**

**Membership Period: May 1, 2013 – April 30, 2014  
Due Date: May 1, 2013**

Make check payable to:  
**Sacramento Legal Secretaries Association**

Amount Due: **\$40**  
Renewals are due May 1, 2013.  
There will be a late fee of \$5 after June 1, 2013.

Return the completed invoice and full payment to:  
**Maryanna Rickner, Treasurer  
Sacramento Legal Secretaries Association  
c/o Sacramento County Office of Education  
PO Box 269003  
Sacramento, CA 95826-9003**

**MEMBER INFORMATION (PLEASE PRINT LEGIBLY):**

NAME: \_\_\_\_\_ Are you a CCLS?  Yes /  No

BIRTHDAY: \_\_\_\_\_

TITLE: \_\_\_\_\_

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

BUSINESS ADDRESS: \_\_\_\_\_

CITY, STATE & ZIP: \_\_\_\_\_

BUSINESS PHONE: \_\_\_\_\_

BUSINESS FAX: \_\_\_\_\_

BUSINESS E-MAIL: \_\_\_\_\_ (for vital updates/reminders)

RESIDENCE ADDRESS: \_\_\_\_\_

CITY, STATE & ZIP: \_\_\_\_\_

RESIDENCE PHONE: \_\_\_\_\_

RESIDENCE E-MAIL: \_\_\_\_\_ (for vital updates/reminders)

**YOUR SPECIALTY:**

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Administrative Law      | <input type="checkbox"/> Appellate Law        | <input type="checkbox"/> Bankruptcy            |
| <input type="checkbox"/> Corporate Law           | <input type="checkbox"/> Criminal Law         | <input type="checkbox"/> Environmental         |
| <input type="checkbox"/> Family Law              | <input type="checkbox"/> Labor and Employment | <input type="checkbox"/> Law Office Management |
| <input type="checkbox"/> Legal Support           | <input type="checkbox"/> Litigation           | <input type="checkbox"/> Personal Injury       |
| <input type="checkbox"/> Probate/Estate Planning | <input type="checkbox"/> Real Estate          | <input type="checkbox"/> Other: _____          |

**MAILING/LISTING INFORMATION:**

Where do you want your SLSA/LSI mail delivered?  Business  Residence

Where do you want e-mail delivered?  Business  Residence

Which address should be listed in the membership roster?  Business  Residence

If you do NOT want to be listed in the membership roster, check here:  No roster listing

**INVOLVEMENT:**

Have you been awarded lifetime membership in SLSA? (If yes, return form only w/out dues)  Yes  No

Are you interested in volunteering as a committee chairperson or co-chairperson?  Yes  No

What topics and speakers would benefit you most this coming year? \_\_\_\_\_

<b>SLSA USE ONLY</b>	Date Received: _____	On Roster: _____
	Check no.: _____	On LSI: _____
	On Email List: _____	To Editor: _____

### **New Presiding Judge of Sacramento County Superior Court**



*Judge Robert Hight*

On September 19, 2013, the judges of the Sacramento Superior Court elected Judge Robert Hight as their next Presiding Judge. Judge Hight's term will run from January 1, 2014, through December 31, 2015. He will replace current Presiding Judge Laurie M. Earl.

Judge Kevin R. Culhane was elected by the Sacramento Superior Court bench to the position of Assistant Presiding Judge. Judge Culhane will also serve as the Acting Presiding Judge in the Presiding Judge's absence.



### **Judge Laurie M. Earl Receives Distinguished Service Award**

Presiding Judge Laurie Earl has been named as one of the 2013 Distinguished Service Award winners by the Judicial Council of California. Judge Earl will receive the Ronald M. George Award for Judicial Excellence. The Service Award is the highest honor given by the Council to recognize those who have made significant contributions to access to justice and the administration of justice.

Additionally, the Sacramento County Bar Association has named Judge Earl as the 2013 Judge of the Year. Criteria for the award includes: commitment to principles of the SCBA Mission Statement (to enhance the system of justice, the lawyers who serve it, and the community served by it); commitment to fair and equitable administration of the courts; respected for legal abilities by fellow judges and attorneys who appear before him/her; known for appropriate judicial demeanor and lack of bias; demonstrated service to the Sacramento community at large.



### **Judge James Mize Named Judicial Officer of the Year**

Judge James Mize has been named Judicial Officer of the Year by the Family Law Section of the State Bar of California. He was honored on October 11, 2013, at the Family Law Section Reception at the State Bar Conference in San Jose, CA.

*Congratulations to our Sacramento County Superior Court judges on their continued service and distinguished achievements!*

### **Limited Filer Information (U.S. Bankruptcy Court)**

Effective December 1, 2013, amended Fed. R. Bankr. P. 1007(b)(7) will give an individual debtor the option of having an approved personal financial management course provider notify the court directly that the debtor has completed a post-petition instructional course concerning personal financial management. To directly notify a bankruptcy court of a debtor's course completion, an approved course provider will file a personal financial management course certificate with the court. Approved course providers will need to register as CM/ECF limited filers in each bankruptcy court where they are filing certificates. Questions concerning the subject matter above should be directed to the eFiling Help Desk at 855-542-0992.

## CHANGES?? UPDATES??

Are you an SLSA member who has moved? 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 the good times, and support you during the tough times. Please send your news to [treasurer@slsa.org](mailto:treasurer@slsa.org)



### Sacramento Legal Secretaries Association Name/Address Change Reporting Form

Please fill out this form to let us know the changes you would like to make to your membership record.

#### CHANGES IN MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

NAME: \_\_\_\_\_  
FORMER NAME: \_\_\_\_\_  
NEW EMPLOYER: \_\_\_\_\_  
BUSINESS ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_  
STATE & ZIP: \_\_\_\_\_  
BUSINESS PHONE: \_\_\_\_\_  
FAX: \_\_\_\_\_  
BUSINESS E-MAIL: \_\_\_\_\_  
NEW HOME ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_  
STATE & ZIP: \_\_\_\_\_  
HOME E-MAIL: \_\_\_\_\_

#### CHANGE IN SPECIALTY:

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

#### CHANGES TO MAILING/LISTING INFORMATION:

Where do you want *The Legal Eagle* and other SLSA/LSI mail delivered?

Where do you want e-mail delivered?

Which address should be listed in the membership roster?

If you do NOT want to be listed in the membership roster, check here:

- |  |                               |
|--|-------------------------------|
| <input type="checkbox"/> Business          | <input type="checkbox"/> Home |
| <input type="checkbox"/> Business          | <input type="checkbox"/> Home |
| <input type="checkbox"/> Business          | <input type="checkbox"/> Home |
| <input type="checkbox"/> No roster listing |                               |

Please submit to:

**Attn: Maryanna Rickner**  
**SLSA Treasurer 2013-2014**  
**c/o Sacramento County Office of Education**  
**PO Box 269003**  
**Sacramento, CA 95826-9003**  
**E-mail: [treasurer@slsa.org](mailto:treasurer@slsa.org)**

At over 200 MPH, the Peregrine Falcon is the fastest animal on the planet.

Rumor has it they trained here at Atkinson-Baker.



  
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Editor-Corene E. Rodder

## Editor's Note

The Legal Eagle always welcomes letters and article suggestions from readers. Please send them to: Corene E. Rodder, c/o Greenberg Traurig, LLP, 1201 K Street, Suite 1100, Sacramento, CA 95814 or [rodderc@gtlaw.com](mailto:rodderc@gtlaw.com).

The Sacramento Legal Secretaries Association reserves the right to edit articles and letters sent in for publication. Unless stated otherwise in the "Dates to Remember" section of the bulletin, the deadline for all submittals is the Monday after the general meeting of the month preceding the month of publication. This publication is designed to provide accurate

and authoritative information in regard to the subject matter covered. It is distributed with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If legal advice or other expert assistance is required, the service of a competent, professional person should be sought.

The opinions expressed in the articles published herein are those of the individuals submitting the articles and not necessarily the views of the board or editorial staff. This publication may not be reproduced in whole or in part without the express written consent of the board of the Sacramento Legal Secretaries Association.



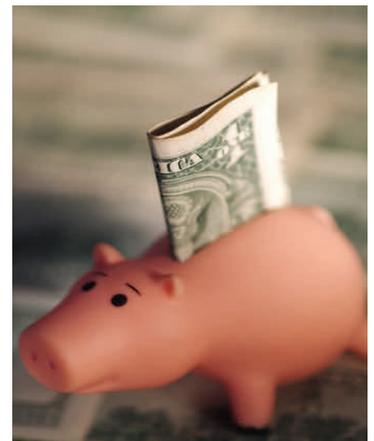
Submitted by Kimberly Ann Smith

## Benefits

**This month, we are putting the spotlight on two of the benefits you enjoy as an LSI member.**

**Provident Credit Union** -- Currently the 71st largest credit union in the U.S. (17th largest in California),

Provident Credit Union was established in 1950 to serve the California Teachers Association. Headquartered in the San Francisco Bay Area, Provident Credit Union now serves more than 100,000 members from over 1200 employer groups and maintains branches throughout California, and nationwide. [www.providentcu.org](http://www.providentcu.org)



**Legacy Wealth Management** -- Helps individuals and families during life transitions such as retirement, death of a loved one, or divorce. We provide a customized system enabling each client to make important financial decisions while helping them focus on the development of a future personal legacy. Legacy's focus areas include growth of assets, retirement planning, tax control, estate planning, educational planning, increasing liquidity/income, risk management, and liability management.

[www.legacywealthmanagement.biz](http://www.legacywealthmanagement.biz)



**LEGAL SPECIALIZATION SECTION SEMINARS**  
 LSI 3rd Quarterly Conference – February 21-23, 2014 – Doubletree Hotel Modesto  
 Hosting Associations: Merced County LPA and Stanislaus County LPA  
**REGISTRATION FORM - DEADLINE IS Tuesday, February 11, 2014**



Registration **MUST** be **RECEIVED** by the LSS Coordinator **on or before the deadline.**

Please make advance reservations so materials may be prepared. Please check all appropriate boxes below.

LSI SECTION MEMBER: Free with Advanced Reservations \$5.00 at the Door/After Deadline Handout Only: \$5.00	LSI NON-SECTION MEMBER: \$10.00 with Advanced Reservation \$15.00 at the Door/After Deadline Handout Only: \$10.00	NON-LSI MEMBER: \$15.00 with Advanced Reservation \$20.00 at the Door/After Deadline Handout Only: \$15.00
<b>Friday, February 21, 2014 – 7:30 p.m. to 9:00 p.m.</b>		
<b><u>LAW OFFICE ADMINISTRATION:</u></b> Topic: <i>Health &amp; Safety and Risk Management</i> Speaker: Charles Craig <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<b><u>CRIMINAL LAW:</u></b> Topic: <i>Gang Suppression</i> Speaker: Sgt. Rodney Rego, Stockton P.D. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
<b>Saturday, February 22, 2014 – 10:30 a.m. to 12:00 p.m.</b>		
<b><u>PROBATE/ESTATE PLANNING:</u></b> Topic: <i>Protecting Assets from Medi-Cal Recovery</i> Speaker: Randy Rosa, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<b><u>TRANSACTIONAL LAW:</u></b> Topic: <i>Bankruptcy Basics &amp; Chapter 9 - Cities Bailing Out Through Bankruptcy</i> Speaker: Diane Mecca <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
<b>Saturday, February 22, 2014 – 4:00 p.m. to 5:30 p.m.</b>		
<b><u>FAMILY LAW:</u></b> Topic: <i>Pre- v. Post- Nuptial Agreements -- Which is Better?</i> Speaker: Stacy Speiller, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<b><u>CIVIL LITIGATION:</u></b> Topic: <i>Advanced Discovery - Withholding Documents &amp; Privileges</i> Speaker: Weldon J. Mattos, Jr., Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	

Name: \_\_\_\_\_ PLS/CCLS/CLA/Paralegal E-mail: \_\_\_\_\_  
 Address/City/State: \_\_\_\_\_  
 Phone: (Work) \_\_\_\_\_ (Home) \_\_\_\_\_ Local Assn.: \_\_\_\_\_ LSA/LPA  
 Method of Payment:  Check    Credit Card   Number \_\_\_\_\_ Expiration Date: \_\_\_\_\_  
 Name on Credit Card: \_\_\_\_\_ Type of Card: Visa \_\_\_\_\_ M/C \_\_\_\_\_ Card Verification No: \_\_\_\_\_

**Mail, Fax, or Email completed form to:**

Cheryl L. Kent, PLS, CCLS, LSS Coordinator  
 P.O. Box 12082, Pleasanton, CA 94588  
 925-523-3086 (fax) ~ [clkcls@comcast.net](mailto:clkcls@comcast.net)

Send a self-addressed, stamped envelope if you wish confirmation of your reservation.

**PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"**

*Speakers and Topics are Subject to Change*

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.

*The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1.25 hours each, by the State Bar of California.*

**2013-2014 Legal Specialization Section Leaders:**

<b>Civil Litigation:</b> Dawn R. Forgeur, CCLS <a href="mailto:dforgeur@stoel.com">dforgeur@stoel.com</a>	<b>Law Office Administration:</b> Tammy L. Hunt, CCLS <a href="mailto:loaleader@thunt.org">loaleader@thunt.org</a>
<b>Criminal Law:</b> Jill Gardella <a href="mailto:jgardella@nablaw.com">jgardella@nablaw.com</a>	<b>Probate/Estate Planning:</b> Kristi L. Edwards, CCLS <a href="mailto:kledwards@justice.com">kledwards@justice.com</a>
<b>Family Law:</b> Mary Lou Floyd, CCLS, M.S. <a href="mailto:Louloux7@yahoo.com">Louloux7@yahoo.com</a>	<b>Transactional Law:</b> Lisa De La O <a href="mailto:ldelao@fitcheven.com">ldelao@fitcheven.com</a>

# LEGAL SPECIALIZATION SECTIONS

## *Of LEGAL SECRETARIES, INCORPORATED*

### 2013-2014 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: **Cheryl L. Kent, PLS, CCLS, Legal Specialization Sections Coordinator**  
**P. O. Box 12082, Pleasanton, CA 94588**

Enclosed is payment of my dues for the fiscal year **8/1/13** through **7/31/14** 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.**

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QUESTIONS AND CONCERNS CONTACT:  
 Mary J. Beaudrow, CCLS, LSI Vice President  
 LSI Marketing Committee Coordinator  
 939 Hough Avenue, #22, Lafayette, CA 94549  
 Cell - (415) 717-5675  
[marybeau@comcast.net](mailto:marybeau@comcast.net)



Submitted 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.

Employers/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, and years of experience required. The attorney/employer is requested to e-mail the Employment Chair 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. 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.

**(12/5/13) Legal Assistant/Paralegal/Secretary.** Sacramento law office seeks a full-time Legal Assistant/Paralegal/Secretary. Duties and responsibilities include, but are not limited to: basic computer skills, filing, back-up reception and organizing large volumes of documents. Requires excellent telephone etiquette and interpersonal skills. Applicants should have excellent customer service skills and be able to multitask. Must possess strong written and verbal communication skills, ability to work under pressure and meet deadlines with a high degree of accuracy and extraordinary attention to detail. Dependability and punctuality is a must. Must be a quick learner, professional and able to closely follow instructions. Duties will include answering and transferring phone calls, taking messages, greeting clients, faxing, mailing, filing, scanning, typing, calendaring and file maintenance. Please send resume for confidential review to [dsidhu@goodman-law.com](mailto:dsidhu@goodman-law.com).

**(12/2/13) Litigation Secretary.** Kershaw, Cutter & Ratinoff is looking for a highly qualified litigation secretary. Applicants should have at least 5 years of litigation and trial experience. This position requires a strong attention to detail and the ability to multitask in a fast paced environment. Duties will include but are not limited to: drafting and proof reading documents; complaints, demands, discovery, motions and briefs; filing in Federal and State courts; service; calendaring; scheduling; and heavy client contact. Please send resumes by email to [nziegler@kcrlegal.com](mailto:nziegler@kcrlegal.com). Competitive salary and benefits offered.

**(11/26/13) Court Manager.** Court Manager position available within an Attorney Support Office. An Attorney Service in the Downtown Sacramento area is currently seeking a motivated and knowledgeable person to fill the position of Court Department Manager. Duties include receiving and monitoring filings, legal research, and general field work for California and the US. We pride ourselves with accurate and swift service for our clients, as maintaining relationships are very important to us. Knowledge of local courts and the court system is definitely a plus. You may email any resumes to [hr4nowsc2@gmail.com](mailto:hr4nowsc2@gmail.com).

**(11/21/13) Litigation Legal Secretary.** The Sacramento office of Greenberg Traurig has an opening for a litigation legal secretary with 7+ years of experience. Qualified candidates must have a thorough understanding of the processes of state (California) and federal litigation. Must be experienced in, and knowledgeable of, e-filing, trial procedures, discovery, document production, document management, calendaring, and case management. The position requires a team player with a service attitude and a superior ability to maintain effective relationships with attorneys, staff, and the general public. The candidate

*(Continued on page 28)*

## Employment Report (continued)

(Continued from page 27)

should be outgoing, creative, intelligent, professional, and polished; must have superior verbal, written and organization skills, and the ability to manage competing priorities. Must also be proficient in MS Word, Excel, PowerPoint, and Outlook. Experience in a fast-paced, large law firm environment highly desired. M-F, 9-6; Candidate should be flexible to work overtime. We offer a competitive salary, outstanding benefits package, and a team-oriented environment. Greenberg Traurig is an Equal Opportunity Employer.

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**(11/13/13) Legal Secretary II** – County of Nevada, Nevada City. The County of Nevada is currently accepting applications for a Legal Secretary II. For salary information, position information and qualifications please see the job announcement online at: <http://www.mynevadacounty.com/nc/hr/Pages/Present-Job-Openings.aspx>.

**(11/4/13) Law Clerk/Legal Assistant**. Seeking a Law Clerk/Legal Assistant for a three-attorney midtown firm. The candidate should have a working knowledge of litigation procedures. Experience in case management, calendaring, court rules, court filings, and communication with court personnel is preferred. Proficiency in WordPerfect, case management software and preparation of Judicial Counsel forms is beneficial. Candidate should be organized, detail-oriented, self-motivated, and able to multi-task and work independently. Job responsibilities include: administrative/clerical functions, drafting legal documents (e.g., motions, stipulations, letters, etc.), and court filings (including e-filing), among other tasks. Please send resume, salary expectations, and cover letter via e-mail to Denise Carruth at [Lawgroup344@yahoo.com](mailto:Lawgroup344@yahoo.com).





Submitted by Debbie Frias, CCLS

This has certainly been an interesting year with the many changes that have taken place in our courts! It has also been a challenge for me as your Legal Procedures Chair to keep up with it all! Thank you to those who have assisted me along the way.

The federal courts are changing, too. I gave President Lynne a quick announcement to distribute at the November dinner meeting that I was unable to attend. Pay.gov is the Department of the Treasury's official application to make secure electronic payments to Federal Government Agencies. Payments can be made by credit/debit card or directly from your bank account. The link given is <http://www.caed.uscourts.gov/caednew/index.cfm/cmecf-e-filing/paygov/>.

Eizabeth Madden, CCLS, sent me a notice for our federal courts that effective December 4, 2013, the court is changing the noticing process when fees are due in federal courts. You will no longer receive an email from the court when fees are due. Instead, you will receive a notice of Payment Due. Full payment is expected the same calendar day documents are e-filed. Payments due must be made online through Pay.gov. To pay online, log on to the eCalWebFiling system and click 'Make a Payment' under the 'Payment History' tab at the top of the page. If you are unable to complete the payment transaction using Pay.gov, or if you dispute the propriety or the amount of the fee charged above, please call the Finance Department at (916) 930-4437 during regular business hours. Thank you, Elizabeth!

Thank you again to my state counterpart, Jeff Weddle, for his updates on the LSI Procedures Blog. In the federal court category, we have United States Bankruptcy Court - Transcript Order Procedures; there are new amended federal rules effective December 1, 2013, and there is an increased fee and commissions schedule for the United States Marshals' Service.

On the state court level, Jeff tells us that in San Bernardino County Superior Court, there is a new family law calendar system, and you must reserve a court date.

We must always remember that in January and usually July each year, we can count on changes in our state courts. Jeff tells us in the Blog that there are new and amended California Rules of Court effective January 1 and March 1, along with new and amended California Forms effective January 1. Check it out, folks! Space does not allow me to go into each of these announcements and, therefore, I urge you once more to check out the Blog by going to [www.lsi.org/Members Only/](http://www.lsi.org/Members Only/) Procedures. President Lynne has the password, so if you need it, please contact her, as I am unable to give the information out in this rather public format.

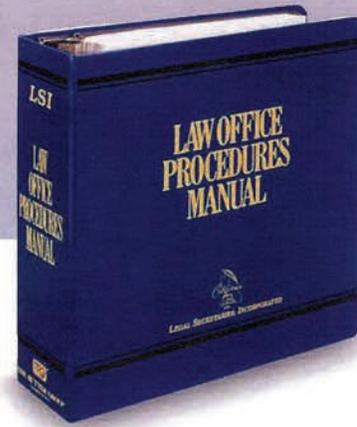
**Answers to the CCLS Quiz**

- 1. F
- 2. F
- 3. T
- 4. T
- 5. F
- 6. F
- 7. F
- 8. F
- 9. F
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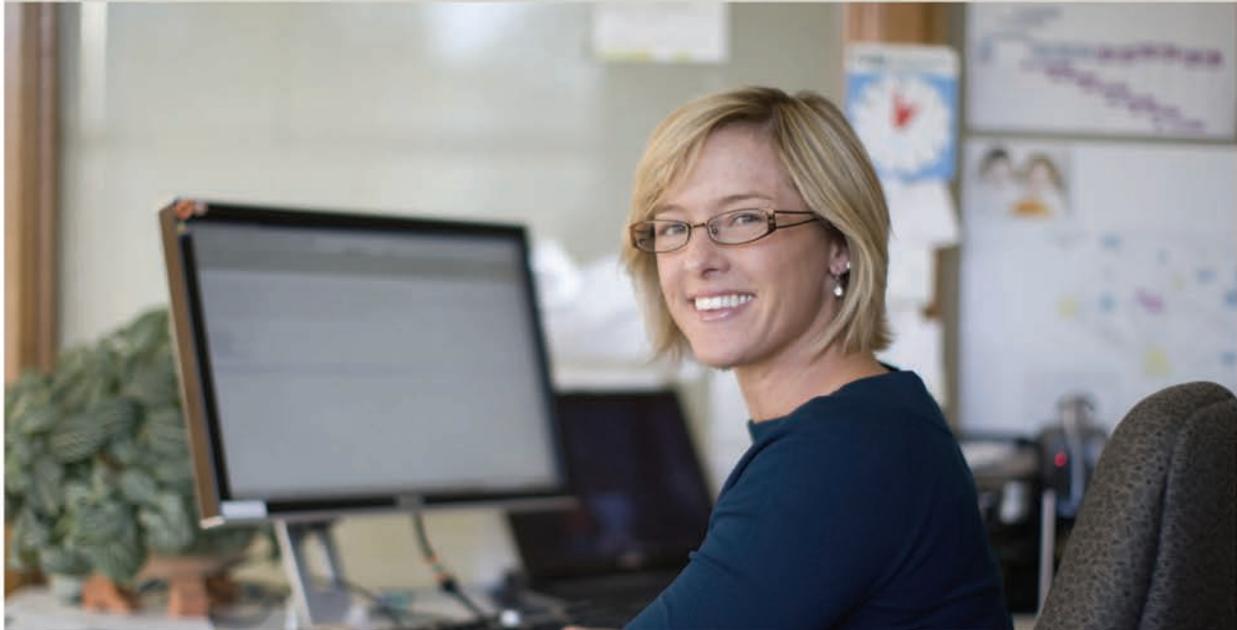
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## Calendar/Dates to Remember



### December\*

Dec. 6 – RSVP Deadline for Dec. 12 Mock Trial and Ornament Exchange.

Dec. 9 – SLSA Executive Board Meeting, 5:30 pm, Greenberg Traurig, 1201 K Street, Suite 1100, Sacramento, CA. All members welcome.

Dec. 12 – SLSA Mock Trial and Ornament Exchange. 5:30 pm. Courtyard Marriott, 4422 Y Street, Sacramento, CA.

Dec. 16 - Deadline to submit bulletin articles to the Editor for the January issue of *The Legal Eagle*.

Dec. 25 – Christmas Day. All state and federal courts closed. No mail service.

*\*Be sure to check local court websites for special court closure periods or early closure days during the holiday season.*

### January

Jan. 1 – New Year’s Day. All state and federal courts closed. No mail service.

Jan. 6 – RSVP Deadline for Jan. 16 Annual State Court Updates Meeting.

Jan. 13 – Deadline to apply to take the March 15, 2014, CCLS Exam without incurring late fees.

Jan. 13 – SLSA Executive Board Meeting, 5:30 pm, Greenberg Traurig, 1201 K Street, Suite 1100, Sacramento, CA. All members welcome.

Jan. 16 – Day in Court: Annual State Court Updates Meeting. No-Host Meet & Greet and Exhibitor Gallery, 4:45-6:45 PM. Dinner 6:15 PM. Hilton Arden West, 2200 Harvard Street, Sacramento, CA.

Jan. 20 – Martin Luther King, Jr. Day. All state and federal courts closed. No mail service.

Jan. 20 – Deadline to register for February 2014 LSI Quarterly Conference.

Jan. 21 -- Deadline to submit bulletin articles to the Editor for the February issue of *The Legal Eagle*.

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Submitted by Astrid Watterson, CCLS

It's almost the end of 2013 and we are also close to the end of the fiscal year for SLSA. Do you know what that means?

Nominations and elections!!! Nominations will be closed in February,

voting will be held in March, and installation will occur in April. That leaves us January to recruit potential candidates for office. There are a few things that Robert's tell us about the process. Generally, if only one candidate has been nominated for an office, the chair simply declares the nominee elected by acclamation, meaning they win the bid for office. However, SLSA's bylaws require a ballot vote, in which case a vote *must* be conducted. On any ballot, "write-in votes" may be cast for any eligible person even though he or she has not been nominated. (Robert's Rules of Order *In Brief* at p. 79.) However, you must remember that the person being nominated must consent to being nominated. SLSA ballots are mailed to all members eligible to vote. The ballots are required to be signed by the member and returned to the Nominations and Elections Committee. The committee collects all of the ballots and at the March dinner meeting, counts the ballots and announces the elected candidates.

In order for this association to continue providing you with legal updates, meetings, events, and an opportunity to network, we need volunteers. Volunteers are the heart and soul of this association. I sincerely hope that there are a few of you that would like to continue to help see SLSA flourish.

On another separate note, LSI has passed several bylaw amendments that may affect SLSA. At our December meeting, the Executive Board will have a few recommendations regarding the Standing Rules, and at our February meeting, with proper notice provided to all members, there will be a few bylaw amendments presented to the members for voting. As a reminder, in order for Standing Rules to be amended, it takes a majority of those members present who constitute a quorum. If ever you are at a meeting and have a question regarding parliamentary procedure, don't be afraid to ask.

Happy Holidays to all!

### LSI 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 LSI Past President, Joan M. Moore, PLS, CCLS*





### Submitted by Dawn Forgeur, CCLS

The following recommendations and amendments were adopted by the governors at the November Quarterly Conference.

#### Executive Committee Recommendation No. 1

### 33. AMENDING THE STANDING RULES

33.1 An Amendment to the Standing Rules requires a majority vote of the votes cast after quorum has been met.

Executive Committee Recommendation No. 2-To insert a new standing rule 2.15.1 re the timely submission of written reports of LSI Officers, Appointed Officers, and Chairmen at quarterly conferences.

2.15.1 The due date of written reports of LSI Officers, Appointed Officers, and Chairmen are listed in the Summary of Due Dates and Deadlines for each LSI Quarterly Conference. Written reports that are not timely submitted to the LSI Administrator by the deadline listed in the Summary of Due Dates and Deadlines must be printed and submitted in paper format. The LSI Officer, Appointed Officer or Chairman submitting an untimely written report may not be eligible for reimbursement of copies under LSI Standing Rule 17.5.3.

Executive Committee Recommendation No. 3-To insert a new standing rule 3.15.1 re the timely submission of written reports of LSI Officers, Appointed Officers, and Chairmen at annual conference.

3.15.1 The due date of written reports of LSI Officers, Appointed Officers, and Chairmen are listed in the Summary of Due Dates and Deadlines for each LSI Annual Conference. Written reports that are not timely submitted to the LSI Administrator by the deadline listed in the Summary of Due Dates and Deadlines must be printed and submitted in paper format. The LSI Officer, Appointed Officer or Chairman submitting an untimely written report may not be eligible for reimbursement of copies under LSI Standing Rule 17.5.3.

Executive Committee Recommendation No. 4-To insert a new standing rule 17.5.3.1 re the reimbursement of photocopies for LSI Officers, Appointed Officers, and Chairmen who submit late reports to the LSI Administrator.

#### Continuing Education Council Recommendation No. 1

LSI will sponsor another 10-week CCLS online study course, to be conducted by the CCLS chair, beginning in January 2014.

#### Continuing Education Council Recommendation No. 2

The cost for the 10-week CCLS online study course beginning January 2014, is set as follows:

\$100 for LSI members enrolled for the first time  
\$125 for non-LSI members enrolled for the first time  
\$50 for LSI members repeating the study course  
\$75 for non-LSI members repeating the study course

#### Continuing Education Council Recommendation No. 3

LSI will sponsor a six-week Beginning Legal

*(Continued on page 35)*



(Continued from page 34)

Secretarial Training online study course, to be conducted by the Legal Secretarial Training chair, beginning in January 2014.

Continuing Education Council Recommendation No. 4

The cost for the six-week Beginning Legal Secretarial Training online study course beginning in January 2014, is set as follows:

\$150 for LSI members

\$200 for non-LSI members

Proposed Bylaw Amendment No. 1

The requirement for students to pay per capita tax to LSI has been removed.

Proposed Bylaw Amendment No. 2

The procedure to facilitate a revocation of a local association's charter has been added.

17.5.3.1 Notwithstanding any other provision in these Rules, any LSI Officer, Appointed Officer or Chairman who submits an untimely report to the LSI Administrator, and is therefore required to submit a report in paper format may not qualify for reimbursement under Standing Rule 17.5.3.

## Chapter Achievement Points (CAPs)

Submitted by Dawn Forgeur, CCLS

Happy Holidays!

If you own the Law Office Procedures Manual you have received the most recent update: 2013 Revision #2. Please send me an email when you get this update so I can log it for points!

Also, those members who have your CCLS – remember to let me know when you recertify so I can also log the points. Recertification is every three years and either in March or October, whichever month you took the exam.

And finally, if you see any news or updates that apply to your practice area, send that information to one of the Legal Specialization Leaders and copy [governor@slsa.com](mailto:governor@slsa.com). This is one of the easiest ways SLSA gets points! A list of the Legal Specialization Leaders is below.

Legal Specialization Section Leaders

Civil Litigation, [civil.litigation@lsi.org](mailto:civil.litigation@lsi.org)

Criminal Law, [criminal.law@lsi.org](mailto:criminal.law@lsi.org)

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LSI SECOND QUARTERLY CONFERENCE, NOVEMBER 15 - 17, 2013

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# THE SURVIVORS - A MAYAN ADVENTURE



**CHAPTER ACHIEVEMENT REPORTING FORM 2013-2014**

Each association in LSI participates every year in the Chapter Achievement Points (CAPs) contest, and these points are tracked by SLSA's Governor. This covers activities from April 1, 2013, through March 31, 2014.

**Please complete this form and mail or email it to SLSA's Governor, Dawn Forgeur, CCLS.** 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.

**Date of Event**

**Event**

- \_\_\_\_\_ I submitted an article to *The Legal Secretary* magazine. (50 points)
- \_\_\_\_\_ I attended an LSI Quarterly or Annual Conference. (50 points)
- \_\_\_\_\_ I attended an Officer/Chairman Workshop at the Annual Conference.  
How many? \_\_\_\_\_ (25 points)
- \_\_\_\_\_ I rented a car through Hertz with the LSI discount. (200 points)
- \_\_\_\_\_ I took the CCLS exam – Test Date: \_\_\_\_\_. (100 points)
- \_\_\_\_\_ I passed the CCLS exam – Test Date: \_\_\_\_\_. (200 points)
- \_\_\_\_\_ I recertified as a CCLS during the 2013-2014 fiscal year. (50 points)
- \_\_\_\_\_ I attended another association's monthly meeting, installation, or other function. (50 points)
- \_\_\_\_\_ I attended an educational workshop or seminar sponsored by SLSA or another local  
association. (25 points)
- \_\_\_\_\_ I attended an educational workshop or seminar sponsored by a Forum, CEB, or  
The Rutter Group. (25 points)
- \_\_\_\_\_ 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, 2014. (100 points)
- \_\_\_\_\_ I attended a Legal Specialization Section Seminar at Quarterly or Annual  
Conference. How many? \_\_\_\_\_. (50 points per seminar)
- \_\_\_\_\_ I submitted an article for use in a Legal Specialization Section newsletter. (50 points)
- \_\_\_\_\_ I purchased the *Legal Professional's Handbook* (LPH). (200 points)
- \_\_\_\_\_ I purchased the *Law Office Procedures Manual* (LOPM). (200 points)
- \_\_\_\_\_ I purchased updates to the LPH. (100 points)
- \_\_\_\_\_ I purchased updates to the LOPM. (100 points)

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Sacramento LSA  
Attn: Dawn R. Forgeur, CCLS, Governor  
Stoel Rives LLP  
500 Capitol Mall, Ste. 1600  
Sacramento, CA 95814

## Law Office Products and Management: “Ethics 24/7: How Are your Ethics After-Hours?”

Submitted by Vicki Voisin, ACP

The ethics rules that apply to attorneys also apply to legal support staff. Attorneys are bound by the ethical codes adopted by the American Bar Association and the individual states. A person engaged in a profession such as medicine or the law is held to a higher ethical standard than the average person. This is because the higher standards are necessary to protect the public that the professional serves.

In law, ethical standards that apply to the profession also apply to all individuals working in the profession, whether they're the licensed professional or they are employed by the professional. Therefore, all members of the legal support staff are held to the same high ethical standards as attorneys.

Ethics rules are quite clear while you're at work. Within the confines of the workplace, conflicts checks are routine. It's usually apparent whom the firm is representing. Everyone understands that communications, both oral and written, must be confidential. Privileged documents and communications are evident, and it's obvious that the attorney is the one licensed to practice law. Besides, other people are paying attention to what you are doing.

*In law, ethical standards that apply to the profession also apply to all individuals working in the profession, whether they're the licensed professional or they are employed by the professional.*

It's after-hours, when you're not at the office and no one is looking or listening, that you may let your guard down and ignore the ethics obligations that follow you wherever you go. All of your actions after-hours are bound by the same ethical obligations as when you are on the job. Further, these acts may be just as damaging, perhaps even more damaging, as anything you do at the office.

Here are some interesting situations for you to consider. Do any sound familiar?

**“Do I need a lawyer?”** People will want to talk about potential legal issues. You are not licensed to practice law and cannot give legal advice, even something as simple as telling them that, yes, they need to see a lawyer. Instead, suggest that they make an

appointment with a law firm so that an attorney can evaluate their case.

Another issue here is that this person is not a client of your firm and, therefore, the conversation you have with him is not privileged and may be discoverable by an opposing party.

**“I have a quick question about my case.”** Never engage in conversations about a client's case (with the client or anyone else) outside the office. You never know who may overhear the conversation. If it is overheard by a third party, the conversation loses the privilege. You also owe the client the duty of keeping everything about their case confidential. This is virtually impossible in a public place.

**“Sweetie, I need a simple will and I just can't afford a lawyer.”** Of course you want to help your poor Aunt Pearl and you may think you can draft a “simple will.” However, you do not have the ability (or the authority) to make legal decisions for another person. Only the attorney can use his or her expertise to apply legal judgment to an issue. Besides, you may be doing your

Aunt Pearl a real disservice. It's entirely possible that she has some complex estate planning issues that only the attorney would recognize and have the knowledge to give her the advice she needs. This holds true whether you're paid for helping someone with a legal issue or not. Giving free advice or assistance is

still the unauthorized practice of law.

**“Will you serve on our board of directors?”** Is the entity one of your firm's clients? If so, serving on their board may be a conflict of interest. Discuss this issue with your attorney before you make any commitments.

**“Can we talk off the record about my case?”** Your answer is NO, whether the person is a client or the opposing party. Remember that there are issues of confidentiality and privilege. Also, you cannot have communications with a represented party without their attorney present.

**“I heard Bob and Mary are getting a divorce!”** Oh, yes, your firm is representing Bob in his down-and-dirty divorce from Mary. You know all the sordid details! Keep your lips zipped! Even telling someone that the firm represents Bob is unethical.



may encounter. Always be mindful of potential ethics mine fields that await you both in and out of the office. Keep in mind the Rules of Professional Conduct.

Ethics rules always apply when you're at home, out with friends, at social events, or in public places. When someone asks you a simple question you're tempted to answer, you have to handle the situation ethically to protect yourself, your firm, and the client. Always remember that your ethical obligations are with you 24/7. . . they don't change or end when the clock strikes five!

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*Vicki Voisin, "The Paralegal Mentor," delivers simple strategies for paralegals and other professionals to create success and satisfaction by achieving goals and determining the direction they will take in their careers. Vicki spotlights resources, organizational tips, ethics issues, and other areas of continuing education to help paralegals and others reach their full potential. She publishes a weekly E-zine entitled "Paralegal Strategies," and co-hosts The Paralegal Voice, a monthly podcast on Legal Talk Network. More information is available at [www.paralegalmentor.com](http://www.paralegalmentor.com)*

**"Hello, Judge!"** Communicating with the judge about a case is prohibited and so is any effort to influence the outcome of a case. You must avoid even the appearance of impropriety.

**"I slipped and fell on the ice!"** A golden opportunity, right? You'll get a new client for the firm and look like a hero! Wrong! Staff cannot solicit clients and only the attorney can form the attorney-client relationship. So, don't hand the injured person your card and tell them your firm is the best one to handle a slip and fall case. Also, keep in mind the issue of privilege. The person is not the firm's client and your conversation may be subject to discovery.

These are just some of the slippery situations you

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## Vendor Spotlight: Sacramento Legal Video Center

Submitted by Lynne Koroush, CCLS



Vendors Sean & Jaci McAleer, and  
Lynne Koroush, CCLS

Sacramento Legal Video Center (SLVC) is the Capital City's premier videography company, specializing in video documentation of depositions, wills and testaments, estate planning, pre-nups, seminars, site inspections, and much more. In addition to providing on-site video services, SLVC offers in-house videoconferencing facilities, war room accommodations, and can provide an off-site neutral area for work and documentation for their clients.

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| Estate planning                              | Forest fire scenes                                  |
| Pre-nups                                     | Disc/tape reproduction, transfer, or<br>destruction |
| Settlement videos                            |   |

It was a pleasure to have Jaci and Sean McAleer with us at the November meeting as our Vendor of the Month! They can be reached at (916) 451-7600, or via e-mail at [info@saclvc.com](mailto:info@saclvc.com).

**PLEASE REMEMBER TO SUPPORT OUR VENDORS, BECAUSE THEY SUPPORT US!**

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Effective Oral Communication Skills	Service of Legal Documents
Effective Written Communication Skills	Preparation of Documents Filed with the Court
Calendaring and Timetables	Basics of Civil Litigation
Basic Grammar Skills	

### CLASSES BEGIN MONDAY, JANUARY 6, 2014

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

The cost of the training class, which includes the Legal Secretary's Reference Guide, is \$150 for LSI members and \$200 for non-LSI members. This introductory price is for this session only. Each individual must register separately. Upon completion of the class, students will receive a certificate from LSI.

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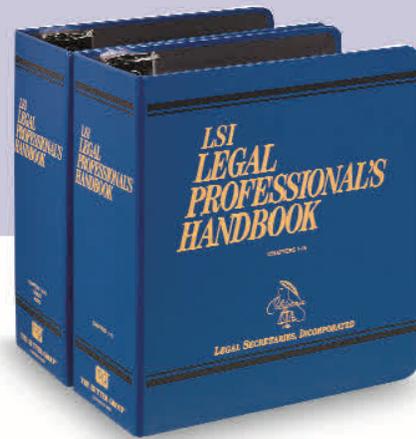
Email registration form NO LATER THAN December 30, 2013, to Shaylene Cortez, CCLS, LSI Legal Secretarial Training/Seminar Chair, [training@lsi.org](mailto:training@lsi.org) or mail to: LSI, P. O. Box 660, Fortuna, CA 95540-0660. Checks should be made payable to LSI. For further information or inquiries, email [training@lsi.org](mailto:training@lsi.org). We will be offering additional sessions commencing in March 2014. No refunds after January 6, 2014.

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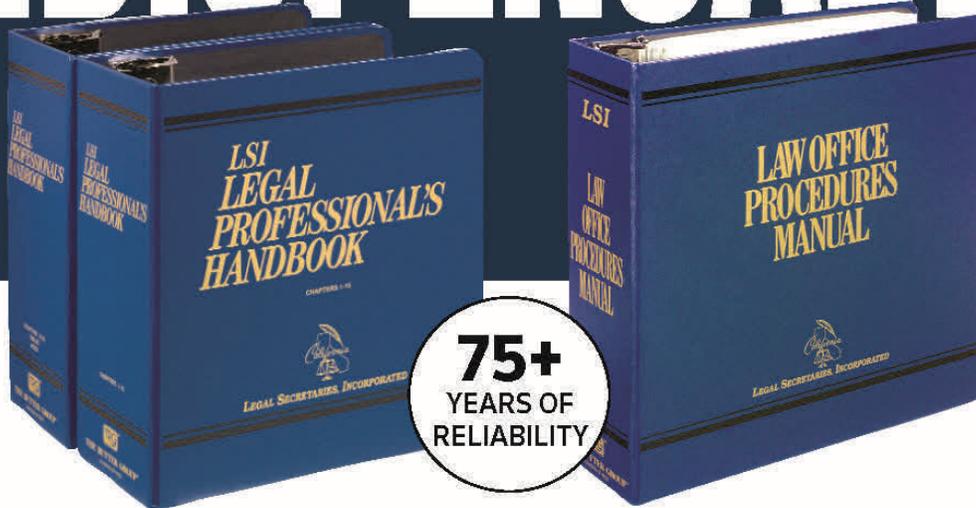
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47	Beverly Hills/Century City	LSA	0		35	35
12	Butte County	LPA	0		11	11
0	Capitol City	LPA	0		0	0
15	Conejo Valley	LPA	3		14	17
25	Desert Palm	LPA	2		11	13
13	El Dorado County	LPA	4		8	12
61	Fresno County	LPA	16		43	59
36	Humboldt County	LPA	3		28	31
32	Imperial County	LPA	15		10	25
38	Livermore-Amador Valley	LPA	1		32	33
66	Long Beach	LPA	6		44	50
56	Los Angeles	LSA	9		44	53
24	Marin County	LPA	4		16	20
46	Merced County	LPA	2		32	34
0	Monterey County	LSA	0		0	0
64	Mt. Diablo	LPA	7		46	53
12	Napa County	LSA	1		12	13
87	Orange County	LSA	7		50	57
0	Palo Alto	LSA	0		0	0
23	Placer County	LPA	5		17	22
4	Redding	LPA	0		0	0
16	Rio Hondo District	LPA	5		13	18
26	Riverside	LPA	2		16	18
162	Sacramento	LSA	18		106	124
234	San Diego	LSA	23		144	167
52	San Fernando Valley	LSA	6		34	40
61	San Francisco	LPA	8		40	48
45	San Gabriel Valley	LSA	4		25	29
78	San Mateo County	LSA	5		55	60
24	Santa Barbara	LPA	3		18	21
108	Santa Clara County	LSA	13		55	68
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39	Stanislaus County	LPA	0		35	35
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4	Trinity County	LSA	0		4	4
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FIRST QUARTER MEMBERSHIP LIST Final 07-31-13.xls

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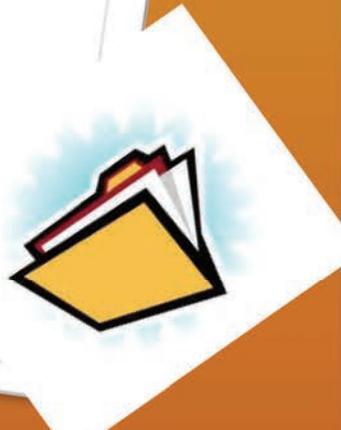
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