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President

Dawn R. Forgeur, CCLS
Stoel Rives LLP
500 Capitol Mall, Suite 1600
Sacramento, CA 95814
(916) 319-4786
president@slsa.org

Bulletin Editor

Liz Gideon, CCLS
Weintraub Genshlea Chediak
Tobin & Tobin
400 Capitol Mall, 11th Floor
Sacramento, California 95814
(916) 558-6086
lgideon@weintraub.com

Sacramento Legal Secretaries Association



THE LEGAL EAGLE



June Event(s)

- **June Regular Dinner Meeting – June 21.** This meeting will be held at the Courtyard Marriott - Midtown Sacramento, 4422 Y Street, Sacramento. You can register online through our website (www.slsa.org) or contact Shelly Reyes at reservations@slsa.org. *See page 14.*

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 Message

by Dawn Forgeur, CCLS



Dawn Forgeur, CCLS

I would like to start out by introducing your Committee Chairmen for the upcoming year:

- Launa Atkinson, CCLS
- Johnny Bateman
- Cindy Biscarra
- Elizabeth Bomke, CCLS
- Alex Cain
- Maimie Chyinski
- Melanie Daly
- Anne French
- Liz Gideon, CCLS
- Lynne Gomes
- Melanie Herman
- Rebecca Lerma
- Teri McClory, CCLS
- Jaymie Moralez
- Crystal Rivera
- Corene Rodder
- Shelly Reyes
- Crystal Rivera
- Mary Taylor
- Astrid Watterson, CCLS



you are held to high ethical standards. This meeting will give you an opportunity to find out just what those standards are. Whether you are new to the legal field, or have been doing this for years, you are sure to learn something new.

Last month was LSI's Annual Conference in San Diego and there were several SLSA members who attended. The three delegates you voted to attend were: Anne French, Debbie Frias, CCLS, and Sherri Lee Caplette, CCLS. If you are curious as to what a delegate does, all three delegates have articles in this bulletin describing the events and meetings that they attended.

Congratulations to the three SLSA members who were appointed to state level chair positions within LSI!

Astrid Watterson, CCLS – LSI Parliamentarian

Tammy Hunt, CCLS – Law Office Administration Legal Specialization Chair

Dawn Forgeur, CCLS – Civil Litigation Legal Specialization Chair

See you at the dinner meeting!



“ Thank you to everyone who said YES when asked to help out!

~Dawn Forgeur, CCLS



This corporation is run on volunteers, and volunteers are what makes SLSA able to bring the members quality educational programs and events. There is absolutely no way that the Executive Board could do all of these things on their own. Thank you to everyone who said YES when asked to help out!

On June 21, 2012, SLSA's dinner meeting topic will be Ethics for Legal Staff. Even if you are not an attorney, if you are a member in SLSA,

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, Lynne Gomes, to her work address at Greenberg Traurig, LLP, 1201 K Street, Ste. 1100, Sacramento, CA 95814.



Parliamentarian's Corner

By Astrid Watterson, CCLS

How to Handle a Parliamentary Inquiry

According to Robert's Rules of Order, a parliamentary inquiry is a question directed to the presiding officer to obtain information on a matter of parliamentary law or the rules of the organization bearing on the business at hand. Robert's is very clear about placing the responsibility of handling such an inquiry with the chair. The chair has the duty of responding to such questions when the answer may assist you to make an appropriate motion, raise a proper point of order, or understand the parliamentary situation or the effect of a motion. Unfortunately, the chair's ruling or response is only an opinion and cannot therefore be appealed. However, it is the responsibility of

the chair to stop and listen to your inquiry and respond. Your questions can be something simple such as: Is it in order at this time to move the previous question? Why can't you bifurcate the current motion? Is it in order to state that you cannot amend the current motion?

If you are not well-versed in parliamentary procedure, you do have the right to make a parliamentary inquiry. The chair is responsible for answering your questions and helping you, as well as other members, understand the process and how it will affect the current motion. Don't be afraid to ask – get involved!



*Astrid Watterson,
CCLS*

Legal Procedures

by Lynne Gomes

Law Office Ethics -- Not Just the Lawyer's Responsibility

Lawyers depend on their staff to perform a great deal of increasingly complex and sophisticated tasks, an arrangement that is beneficial to both the lawyer and the client, and is universally recognized as appropriate. However, the relationship between the lawyer

they are treated as if performed by the lawyer. To put it simply -- the lawyer is responsible for the acts of his or her employees, and the employees are bound by the same code of ethics as the lawyer.

“ The most important thing to remember, is that everything you learn in the law office is confidential. ”

~Lynne Gomes

and support staff is more than simply employer/employee. The mere fact of working in a law office immediately confers the status of a public representative of a professional person. Regardless of the duties performed in a law office, or who performed them, under the Rules of Professional Conduct of the State Bar of California,

It is extremely important that staff recognize that dealings with clients, other lawyers, the courts, and the public are not just reflective of the lawyer, but can actually be equated *with* the lawyer. This means that the legal support staff, as extensions of the attorneys they work for,



Lynne Gomes

Membership Chair Report

by Lynne Gomes

Welcome, and congratulations to the following new SLSA members, who were inducted at the May 10, 2012, regular membership meeting.

ACTIVE MEMBERSHIP

Rebecca Cavazos -- Rebecca is a legal secretary at the Law Offices of Brookman & Wroten, and has worked as a legal secretary since January 2011. She specializes in litigation and personal injury.

Ellie Wright -- Ellie is a legal secretary at the Law Offices of Brookman & Wroten, and has worked as a legal secretary since January 2011. She specializes in litigation and personal injury, and celebrates her birthday on August 16.

Angie Lombard -- Angie is a legal secretary at the Law Offices of Brookman & Wroten, and has been a legal professional since 2004. She specializes in litigation, premises liability, medical malpractice, and personal injury. She enjoys gardening, shopping, working out, and tanning. Angie celebrates her birthday on May 4.

Evelyn Thais -- Evelyn is a legal secretary at the Law Offices of Brookman & Wroten, and has worked as a legal secretary since January 2011. She specializes in litigation and personal injury, and celebrates her birthday on August 20.

Maribel Garza Duran -- Maribel is a legal secretary at the Law Offices of Brookman & Wroten, and has worked as a legal professional since 2006. She specializes in litigation and personal injury, and celebrates her birthday on November 2.

Terry Lee Farster -- Terry is a legal assistant at Goodman & Associates, and has worked as a legal professional since 1997. She specializes in criminal law, litigation, personal injury and employment law. Terry enjoys shooting, reading, science fiction, and cooking, and celebrates her birthday on July 8.

Erin Sanchez -- Erin is a legal secretary with Fagen, Friedman & Fulfrost. She has been a legal professional since 1994, and specializes in litigation. Erin celebrates her birthday on September 30, and enjoys writing fictional romances.

Pamela Spring -- Pamela is a legal secretary with the Pacific Legal Foundation. She is a former member of SLSA, and has been a legal professional since 1995. She specializes in litigation, and celebrates her birthday on June 25. She enjoys darts, karaoke, dancing, horseback riding, and attending sporting events.

STUDENT MEMBERSHIP

Alyssa Hill -- Alyssa Hill is a legal secretary at the Law Office of Ana L. Molleda in Fairfield, CA. She has been a legal professional since April 2012, and specializes in litigation. Alyssa celebrates her birthday on March 30. Alyssa will be eligible for active membership in April 2013.

ASSOCIATE MEMBERSHIP

Jamie Brandt -- Jamie is re-entering the workforce and legal field, and is presently seeking employment and retraining. She has been a legal professional since 1989, and specializes in litigation. Jamie enjoys raising her children and playing tennis, and celebrates her birthday on April 9.

If you are interested in membership in SLSA, please contact Lynne Gomes at (916) 442-1111, or via e-mail at gomesl@gtlaw.com.



Pictured below l to r: New Member Jamie Brandt and Lynne Gomes.

Membership Chair Report (cont.)

by Lynne Gomes

CONDOLENCES:

Rhoda Spencer (LSI Past President 1982-1984, San Diego) passed away at her home in Bonita, California on Sunday afternoon, May 20, after returning from the LSI Annual Conference in San Diego. Her funeral was held on May 25, 2012, at the Corpus Christie Catholic Church in Bonita, and a Hawaiian burial at Glen Abbey Memorial Park.



Two online guest books have been set up for posting messages in Rhoda's memory:

<http://www.legacy.com/guestbook/DignityMemorial/guestbook.aspx?n=rhoda-spencer&pid=157739863>

(SLSA has posted a message on this site)

And

www.glenabbeysandiego.net

Cards and/or letters to Rhoda's family can be mailed to: 5636 Loping Lane, Bonita, CA 91902. The family suggests that memorial donations in Rhoda's name be made to St. Jude's Children's Hospital or LSI's scholarship fund.

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 gomesl@gtlaw.com.

Of Note



Effective November 21, 2011, Sacramento Superior Court issued an order requiring all civil litigants filing case initiating pleadings (including complaints, cross-complaints, petitions, and applications) to provide to the filing clerk at the front counter one additional complete paper copy of the pleadings at the time of filing. The clerk will put this additional copy in the Public Access Bin on the day of filing and made available for public inspection subject to the restrictions of California Rules of Court, Title 2, Division 4.

Reminder: The Traffic Amnesty Program, which gives a 50% reduction on qualifying old, unpaid traffic tickets, will end on June 29, 2012. Parking tickets, DUIs, and reckless driving citations are NOT eligible for the reduction.

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 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. 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.

- (6/1/12) Legal Secretary/Paralegal. Needed immediately at rapidly expanding Roseville law firm: Experienced (at least 2 years) legal professional for heavy civil litigation, discovery, and ex parte. Must know how to calendar, preferably using Abacus and electronic calendars. Must know state and preferably federal court rules/procedures for proper preparation of pleadings, motions, and other documents. Must be able to transcribe as well as draft pleadings and motions. Must be able to get along with co-workers, attorneys, opposing counsel, and court personnel. Please send resumes to joymorgan@unitedlawcenter.com and entitled as above.
- (5/24/12) Legal Assistant/Secretary. Seeking an experienced civil litigation secretary for a 3 attorney firm. Candidate must have 2-5 years of litigation experience with a thorough working knowledge of court rules and civil litigation procedures. Proficiency in Abacus, WordPerfect, and legal forms programs is required and a working knowledge of Timeslips is desirable. Experience is required in case management and calendaring. The successful candidate must possess a working knowledge of court rules, court filing requirements and civil procedure and be able to edit and proofread legal documents and correspondence. Applicants should be well organized, detail oriented, self motivated, and demonstrate an ability to multi task and meet deadlines. Salary is commensurate with experience. Please submit your resume and a cover letter via e mail to sid@rosenberglink.com.
- (5/11/12) Experienced Legal Secretary – All Probate Matters. Small firm on University Avenue has an immediate need for a Legal Secretary experienced in matters under the probate court, including trusts, probates, conservatorships and guardianships. The ideal candidate will have a professional and pleasant demeanor to interact with clients, strong organizational skills and the ability to maintain focus while multi-tasking, as well as the ability to assess, revise and balance priorities. Excellent oral and written communication skills, and the ability to proofread and format legal documents are required. Strong attention to detail is an important quality, especially the ability to calendar and track all deadlines and court hearings with a tickler system, prepare complete court filings for the runner and serve POS and NOH as needed. Please email cover letter and resume to HLOPC.HR@gmail.com.
- (5/7/12) Legal Secretary. Small plaintiff's office (two attorneys, one legal assistant) seeks full time legal secretary. Small, boutique practice. Superb typing, transcription and computer skills are more important than legal experience, as long as applicant is intelligent, industrious, flexible and highly motivated to perform at a superior level. Salary is very competitive and DOE. Retirement, vacation and health benefits are available. Job location is in Sacramento. Please send cover letter and resume to jgeorgejr@psyclaw.com.
- (5/7/12) Receptionist Part-Time. Cook Brown LLP is looking for a part-time receptionist/overflow secretary for its downtown Sacramento office. The ideal candidate will possess strong administrative, organizational, and interpersonal skills, be highly detail-oriented and have the ability to multi-task, prioritize and manage their workload. Skills and Education Requirements: 1+ years' experience in legal secretary support, excellent written and oral communication skills, reliability, teamwork, professionalism, ability to multi-task and attention to detail are essential, legal secretary certification a plus. Duties include: answering phones, greeting clients, light typing, law-library updates, and other general office duties. We offer a competitive salary and benefit package. Qualified applicants may submit their resumes to Joan Gabrielson at JGabrielson@CookBrown.com or may fax their resume to 916-442-4175.

Employment Report/Positions Available (cont.)

by Jaymie Morales

- (5/2/12) Legal Secretary. Mennemeier, Glassman & Stroud LLP, a small, congenial downtown law firm specializing in civil litigation is seeking an experienced litigation secretary. Candidates should have 2 years of litigation experience; understand state and federal court rules and protocols, including the Courts of Appeal; the ability to multi-task under tight deadlines; be able to edit and proofread legal documents and correspondence; have excellent clerical skills for maintaining high-volume files; work well with others. Proficiency in WordPerfect and Timeslips is a must and working knowledge of Word, Excel and PowerPoint is desired. The firm offers health benefits, paid parking, and competitive salary. Interested parties may send resumes via email to cfarrell@mgsllaw.com, or via fax to 916-553-4011. No telephone calls please.
- (4/3/12) Senior Paralegal E*TRADE Financial is seeking a Senior Paralegal for our Roseville, CA office. The Senior Paralegal will split time supporting the Associate General Counsel in handling securities litigation and arbitration cases, and supporting the Manager of Legal Services in all aspects of corporate governance and other legal projects for E*TRADE's foreign subsidiaries. Must have 5+ years of experience in a related field and paralegal support position; BA, AA and/or paralegal certificate preferred. If you are interested, please send your resume to Melissa Yu at melissa.yu@etrade.com.
- (3/28/12) Transcriptionists Transcription company providing transcripts of interviews, meetings, focus groups, and presentations is looking for qualified transcriptionists who can work part time from their homes. Excellent work ethic, grammar and punctuation skills, 80 to 100 wpm typing speed, and the ability to research items on the Internet are required. Transcription experience is extremely helpful, but not required. Must use Word, e-mail, and be able to transcribe from digital audio recordings. If you are not set up to do transcription from digital audio recordings, we can help you. Benefits are flexible work schedules, working from home, interesting subject matter, and great people to work with. Transcriptionists work as independent contractors. Please contact Gwen McCutcheon, Premium Business Services, gwen@premiumbusinessservices.com for more information.

We Did It!!!



Congratulations, SLSA Members! YOU made it happen - - we received First Place in the LSI Membership Contest at Annual Conference as the association who added the most new members between May 2011 and April 2012!!

Thank you for believing in the importance and purpose of SLSA.

Thank you for spreading the word and sharing the ways you benefit from your SLSA membership.

Thank you for doing the great work you do every day, not only in your offices, but for SLSA.

YOUR PARTICIPATION, DEDICATION, CONTRIBUTIONS, ENTHUSIASM, IDEAS, AND SUPPORT MATTER, and we could not do it without YOU!!!

Lynne Gomes

SLSA Vice President



**SUPERIOR COURT OF CALIFORNIA
COUNTY OF SACRAMENTO**

WWW.SACCOURT.CA.GOV

**AMENDED (6/6/2012)
PUBLIC NOTICE
CIVIL FRONT FILING COUNTER – REDUCED SERVICES**

Due to ongoing budget reductions, the Court is reducing public services at the Civil front filing counter located in the Gordon D. Schaber Courthouse at 720 9th Street, Room 102.

Effective July 2, 2012, the Civil front filing counter will **ONLY** accept the following documents for filing:

- Application for Discovery Subpoena – Out of State
- Application and Order for Appearance and Examination
- Ex Parte Applications with a Hearing Date
- Labor Commissioner Appeals
- Law and Motion Documents (Dept 53/Dept 54)
- Law and Motion Documents – Presiding Judge
- Petition for Voter Registration and any related subsequent documents
- Unlawful Detainer – Request To Set Case for Trial (UD-150)
- Writs of Election and any related subsequent documents
- Writs of Mandate and any related subsequent documents

- Petition for Change of Name or Gender Change (Wednesdays **Only** at the specified window)

Payment of:

- Court Reporter/Jury Fees
- Civil Case Related Fees without accompanying documents

The Court will be installing date/time stamping machines and large drop boxes in the Civil Room 102 lobby. **ANY** other document not listed above **MUST** be time-stamped and dropped in the drop boxes provided; they will **NOT** be accepted for filing at the front counter. Documents continue to be accepted via the mail. Documents submitted via the mail and those dropped off will be processed with the same priority.

Civil front filing counter hours remain 8:30 a.m. - 4:00 p.m. The existing lobby drop box will remain available for drop offs until 5:00p.m. *Any document submitted that is complete/correct and adheres to ALL applicable codes relevant to the filing dropped before 5:00 p.m. will be deemed filed on the date of deposit. Any document submitted that is complete/correct and adheres to ALL applicable codes relevant to the filing dropped after 5:00 p.m. will be filed effective the next Court business day.*

Civil front filing counter windows that will accept the above identified documents will be available as follows:

- 1 express window – 2 (two) document maximum per transaction
- 2 general windows - up to 7 (seven) documents per transaction
- 1 civil records window – no change to existing services

SLSA Participates in Sacramento Law Day

On May 2, 2012, Sacramento LSA was honored to have received, and accepted, an invitation to attend the City of Sacramento's Annual Law Day event. What is Law Day? In short, in 1961 Congress issued a joint resolution declaring May 1 Law Day, a national day to recognize and celebrate our justice system and the rule of law. The theme for Law Day this year was "No Courts, No Justice, No Freedom."

We were provided with a booth to showcase how SLSA relates to the legal field and what products we offer, including the Law Office Procedure Manual, a sampling of The Legal Eagle, LSI brochures, SLSA's PowerPoint describing the benefits of SLSA, and many pictures from SLSA events from previous years. Our neighbor booth was the Sacramento Law Library, but there were also vendor booths with representatives from the Sacramento County Bar Association, Sacramento Superior Court, and McGeorge School of Law. SLSA's booth was handled by Dawn Forgeur, CCLS, Deseree Gamayo, and Astrid Watterson, CCLS, who spent the majority of the day talking to everyone about our association. We met several court reporter students in training, as well as members of the community interested in law. From that event, we were also able to promote our Beginning Legal Secretary courses and obtain a few students.

Next year we hope to have new marketing brochures, bulletins, and other materials to hand out and help promote our association and how SLSA supports the legal community. This was a great opportunity to interact with other representatives in the legal field and those interested in a possible career as a legal secretary.



Pictured l to r: Astrid Watterson, CCLS and Deseree Gamayo



Pictured l to r: Dawn Forgeur, CCLS and Deseree Gamayo

**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:

**Lynne Gomes, Vice President
Greenberg Traurig LLP
1201 K Street, Suite 1100
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; 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

(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:

**Lynne Gomes, Vice President
Greenberg Traurig LLP
1201 K Street, Suite 1100
Sacramento, CA 95814**

Benefit Highlights

As members of Sacramento LSA, you are also members of LSI, our parent corporation. LSI has several benefits for its members and a full list of these benefits can be found in this bulletin.

One of these benefits is that members get a discount on car rentals through Hertz! The CDP Card number is 447698 and you can use Hertz's website (www.hertz.com) or call them at (800) 654-3131 to receive the discount. Remember, if you rent a car using LSI's discount, let our Governor know! Your rental counts towards Chapter Achievement Points (CAPs) for SLSA.

What businesses do you deal with on a regular basis? Would they be willing to include SLSA on their list of organizations who receive a discount for utilizing their services? Contact president@slsa.org with the information -- they could be one of our next benefit providers!!



CAPs

by *Melanie Herman*

After winning second place to San Diego LSA, again, Sacramento LSA has set a goal that will secure our place at the top for 2012-2013. As was reported last month, we ended the year at 49,110 points, San Diego LSA ended at nearly 70,000. SLSA's goal for 2012-2013 is 75,000! And we are well on our way at a total of 11,305, as of May 22, 2012, leaving only 63,695 more to go! So if you are a member of an LSI sponsored credit union, or if you have rented a car using the LSI Hertz discount, let us know! Help us capture CAPs and reach our goal. E-mail Melanie and let her know that you earned SLSA points – don't make her harass you. Her e-mail is mherman@perkins-lawoffice.com.

See the Chapter Achievement Reporting Form in this bulletin for more ways to gain points.

CCLS Quiz

True or False

1. A paralegal or legal secretary may form a partnership with an attorney to form a law firm.
 True False
2. You are allowed to talk directly to a party who you know to be represented by an attorney.
 True False
3. In the management of a law practice, an attorney shall not unlawfully discriminate or knowingly permit unlawful discrimination in hiring, promoting, discharging, or otherwise determining the conditions of employment of any person.
 True False
4. It's okay to talk about a client and their case in an elevator with a coworker.
 True False
5. An attorney shall not advise the violation of any law or ruling unless they believe in good faith that such law, rule, or ruling is invalid.
 True False
6. It is okay for an attorney to represent a client in a matter in which another party's lawyer is a spouse as long as the client is informed in writing of the relationship.
 True False
7. An attorney does not have to communicate a settlement offer to the client if he believes the offer is too low.
 True False
8. An attorney whose employment with a client has terminated does not need to promptly release to the client all of the client papers and property if the client has not paid their bill.
 True False
9. An attorney shall not directly or indirectly purchase property at a probate, foreclosure, receiver's, trustee's, or judicial sale in an action in which they are acting as a lawyer for a party or as executor, receiver, trustee, administrator, guardian, or conservator.
 True False
10. An attorney shall not threaten to present criminal, administrative, or disciplinary charges to obtain an advantage in a civil dispute.
 True False

See Answers, Page 21

Law Office Products/Management

The Sacramento County Public Law Library (“SCPLL”) serves the bench, bar, and citizens of Sacramento County. SCPLL is the 6th largest of California’s 58 county law libraries with more than 65,000 volumes. The SCPLL is a practice library, focusing on practical materials for attorneys and lay persons, and use of the library’s collection is free to all who enter the library.

Computer Resources

The library provides patrons free access to a number of online and CD-ROM legal resources. Publishers’ licensing restrictions prohibit the use of these databases through the library’s website, but they are available at all public terminals in the library.



Print resources

The library’s print collection contains over 65,000 volumes. The library’s collection of treatises, looseleaf services, form books and self-help “how-to” books is practice-oriented, focusing on materials that will assist patrons in their legal transactions and court affairs.

Library Services

The SCPLL offers free wireless internet access, fax services (including sending and receiving) for a fee, photocopier and scanner use for a fee, and patrons can save information from the library’s public computers onto disks, USB drives, or CDs (you may bring your own or you may purchase these types of media at the Circulation desk).

MCLE Credits

Additionally, the SCPLL offers several different ways to obtain MCLE credits, such as live classes, self study materials, and online videos.

The SCPLL is located at 609 9th Street, 1st Floor, Sacramento, and their hours are: Monday-Thursday: 8 am - 8 pm; Friday: 8 am - 5 pm; Saturday: 9 am - 4 pm.

Regular borrowers can borrow up to 20 items, with a 2-item limit on audio/visual materials. The following types of individuals may register to become regular borrowers at the SCPLL:

- Judges who have their chambers or offices in Sacramento County.
- Judges who have been temporarily assigned to Sacramento County.
- Government officials and department heads who provide the SCPLL with a signed application. Government officials and department heads who are registered can execute an authorization form to allow their staff to borrow from the Library.
- Attorneys who are current members of the California State Bar and who live in Sacramento County, have an office in Sacramento County, or are members of the Sacramento County Bar Association.
- Clerks, secretaries, paralegals, and other individuals who have been authorized by a judge or attorney registered to borrow from the Library.



Governor's Report

by *Melanie Herman*



Melanie Herman

LSI's 78th Annual Conference was hosted by Imperial County LPA and San Diego LSA on May 17-20, 2012, in San Diego. I attended a couple workshops, including the Governor's Workshop. Additionally, I attended not only the Post Board of Governors, but both sessions of the General Assembly as well as the Pre Board of Governors.

This was an election year for LSI and your newly elected officers are:

- President: Sandra T. Jimenez, CCLS, of Imperial County LPA
- Vice President: Mary J. Beaudrow, CCLS, of Mt. Diablo LPA
- Executive Secretary: Jennifer L. Page, CCLS, of Marin County LPA
- Treasurer: Heather Edwards of San Fernando Valley LSA

On Friday, May 18, after the workshops, I enjoyed lunch with the incoming/outgoing Governors. Since the 2011-2012 fiscal year was very active for LSI, we took the time to discuss

any questions or concerns we had with the many motions that occurred throughout the year. Surprisingly, no one raised any questions as related to the "rebranding" of LSI; instead, we had an extensive discussion regarding LSI's recently adopted amendment to its Bylaws, which now allows students to be active members of LSI. (LSI Bylaw Article V, Section 1, Subsection (a).)

Bright and early on Saturday, May 19, I joined SLSA's Governor Pro Tem, Astrid Watterson, CCLS, and our President, Dawn Forgeur, CCLS, at the Pre Board of Govern-

nors meeting. We approved the minutes, reviewed the Resume of the Executive Committee, which was held the Thursday before, May 17, and approved the proposed amendments to the Bylaws and Standing Rules, as corrected.

Immediately after, I attended the first session of the General Assembly, where they announced that Heather Edwards, of San Fernando Valley LSA, was elected as LSI's Treasurer for 2012-2013. It was also announced that SLSA won first place in the Membership Contest for gaining 34% in new members! We also won second place in the Bulletin Contest. At the second session, the remaining Chairs gave their oral reports, no new business was presented, and the meeting was adjourned.

On Sunday, May 20, after installations, I attended the Post Board of Governors meeting as SLSA's representative, along with 31 other local Governors. The meeting commenced with reviewing the proposed budget for the 2012-2013 fiscal year, and after some discussion it was approved as amended. Under new business, Beverly Miller, CCLS, of Sonoma County LSA, provided LSI notice of a proposed amendment to the Bylaws. The proposed amendment is to Article XIX, Section 2, Subsection (b), and it seeks to eliminate the third to last sentence that reads: "Failure to notify the Executive Secretary within said 45-day period of the action taken shall be deemed an affirmative vote."

The last item to be brought up at the Post Board of Governors Meeting was a Point of Order, made by Michelle Tice, CCLS, of San Diego LSA. The Point of Order was made on

See Governors Report, Page 33



Pictured l to r: Barbara Barregar, Dawn Forgeur, CCLS, and Astrid Watterson, CCLS.



Pictured l to r: Astrid Watterson, CCLS and Melanie Herman on the plane to San Diego.

CHAPTER ACHIEVEMENT REPORTING FORM

Each association in LSI participates every year in the Chapter Achievement contest. An award of \$250 is presented by LSI to the highest scoring association in each membership category at the Annual Conference of LSI. Chapter Achievement Points (CAPs) are tracked during the year by SLSA's Governor. This covers activities from April 1, 2012, through March 31, 2013. This form's purpose is to track each member's activity during the course of the fiscal year. **Please complete this form each time you attend a function and mail it to SLSA's Governor.** 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 belong to an LSI-sponsored credit union. (100 points)
- _____ I am insured through an LSI plan. (100 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 submitted questions to LSI for use on the CCLS Mock exam.
How many? _____. (25 points per question)
- _____ I recertified as a CCLS during the 2012-2013 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, 2013. (100 points)
- _____ I attended a Legal Specialization Section Seminar at Quarterly or Annual
Conference. How many? _____. (50 points per seminar)
- _____ 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 purchased the *Legal Professional's Handbook* (LPH) between April 1, 2012, and
March 31, 2013. (200 points)
- _____ I purchased the *Law Office Procedures Manual* (LOPM) between April 1, 2012,
and March 31, 2013. (200 points)
- _____ I purchased updates to the LPH between April 1, 2012, and March 31, 2013. (100 points)
- _____ I purchased updates to the LOPM between April 1, 2012, and March 31, 2013. (100 points)

Name: _____ Email: _____

If you have any questions or would like to email this form, you can reach the Governor at governor@slsa.org, otherwise you can mail this form to:

Sacramento LSA
Attn: Melanie Herman, Governor
Perkins & Associates
300 Capitol Mall, Ste. 1800
Sacramento, CA 95814



Sacramento Legal Secretaries Association

Dinner Meeting - June 21, 2012



Ethics for Legal Staff

James M. Nelson, Esq.
Greenberg Traurig, LLP

Vendor of the Month:
TSG Reporting, Inc.

5:30 – 6:15 p.m. Meet & Greet
6:15 – 8:00 p.m. Dinner Meeting

Courtyard Marriott - Midtown Sacramento
4422 Y Street, Sacramento
\$25 SLSA Members*/\$28 Non-Members*

R.S.V.P. by June 18. Checks should be made payable to SLSA, and mailed to: Shelly Reyes, Registration/Reception Chair 2012-2013, c/o Law Office of Robert J. Binns, 3620 American River Dr., Ste. 175, Sacramento, CA 95864; or fax: 916-487-6314; or email to: reservations@slsa.org. You may also register online at www.slsa.org. Please add \$3 for reservations made after June 18. **NOTE:** Cancellations must be received 48 hours in advance for a refund. **No-Shows will be billed.**

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**.

NAME: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

EMAIL: _____ TEL: _____

Do you require an MCLE or CCLS certificate?

If you are not a member of SLSA, would you like to be on our email list for upcoming events? YES NO

Are you an SLSA member? YES NO *If "No", are you interested in membership? YES NO*

Are you interested in volunteering with SLSA? YES NO

Entrée Selection:

Medallions of Beef with gorgonzola, wild mushrooms, and Marsala sauce.

Penne Pasta with tomato, Kalamata olives, artichoke hearts, and onions.

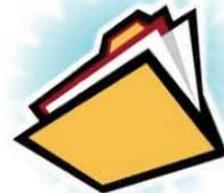
All meals will be served with a salad and dessert.



FOR SALE!

Sacramento Legal Secretaries Association is selling 2 GB flashdrives as part of its Ways and Means project this year. Help support SLSA and purchase your flashdrive today. They will be sold at the general meetings or you may contact SLSA President Dawn Forgeur, CCLS at drforgeur@stoel.com.

\$10 EACH



Delegate Report: LSI 78th Annual Conference

by Debbie Frias, CCLS

As one of SLSA'S delegates, I had the pleasure of traveling to beautiful San Diego on Thursday, May 17.

Our hosting associations, Imperial County LPA and San Diego LSA, chose the Bahia Resort, located at Mission Bay. The resort has an old portion which has five stories, and a newer area that was very spread out throughout the resort property. My conference roommate, Sherri Lee Caplette, CCLS, and I shared a "studio garden" room which was on the first floor of the older building and looked out to a part of the bay. It was beautiful! We also had a duck family that frequented the lawn area in front of our room from time to time, giving us opportunity to ooh and aah and to take pictures.

On Friday, May 18, I went to two officer-chairman workshops that President Dawn assigned me to attend on behalf of our association; those workshops were for Ways and Means and Newcomers.

Ways and Means was chaired by San Diego LSA Ways and Means Chair, Barb Bretherton. Our workshop was held on one of two 19th century paddlewheelers, known as the William Evans I. At the first workshop, Ways and Means, we talked about whether the chairman of that committee should use an outline of the responsibilities. The consensus was yes, an outline should be used to track responsibilities, including the final preparation of report and possible audit later. "Should successes of the

previous year's events be continued?" Yes. It builds momentum, excitement, etc. Should we have joint projects with other associations? It is a good idea. Possible events suggested were Bingo Night, Night of Bowling, Miniature Golf, Cookbook sales, Vendors Night, Halloween Fundraiser, Wine Tasting, Silent auctions, and Day at the Park baseball game (River Cats!). I will pass my workshop handout to President Dawn, but the workshop got me to thinking about possibilities for our own association as ways and means possibilities. Members: think

about it - perhaps you have your own ideas; pass them on to our board for consideration. Maybe some of the ideas I gleaned from the workshop will help you.

The second workshop, held on the second paddlewheeler, known as Bahia Belle II, was chaired by Heather Edwards from San Fernando Valley. Heather warmly welcomed the group, many of whom were brand new to conferences, let alone annual. She talked about the history of LSI, the CCLS certification program, and advantages of membership. She gave an explanation of the various acronyms used by our state association (i.e., CCLS, LSI, LSS, etc.) and helped explain the various events at conference by giving attendees a navigational tool. Towards the end of the time allotted for the workshop, Heather took her attendees on a "field trip" by taking us to where the vendors were and explaining to the newcomers why the exhibitors were present and what they had to offer.

Friday night, your delegates attended the Welcome Reception which was held - again - on the William Evans I. The conference theme was "Happy Days" - think "50s" - and some were dressed in attire pertinent to that period, dressed in poodle skirts, oxfords and the like. The music played was a tribute to the 50s.

The reception was also a campaign party, in that election of a new treasurer would take place the following day during the general assembly.

Candidates Carrie Hughes (from Mt. Diablo LPA) and Heather Edwards (from San Fernando Valley LSA) had separate tables where we would go to find out about the candidates, their experience and qualifications for the job of Treasurer. Sacramento was instructed to support Heather.

We were up early Saturday morning as the General Assembly was scheduled to begin at 9:30 a.m. After opening ceremonies, including presentation of colors, the Pledge of Allegiance, reading of the Code of Ethics, an inspirational message, memorial address and a presentation by our Keynote Speaker Steve Escalera, Esq.,

See Delegate Report (Frias), Page 19



Pictured below l to r: Debbie Frias, CCLS, Dawn Forgeur, CCLS, and Anne French.

Delegate Report (cont.)

LSI 78th Annual Conference

by *Debbie Frias, CCLS*

President, Imperial County Bar Association, and introduction of the LSI Executive Committee, LSI past presidents and special guests, our business meeting began.

Near the top of the business meeting, the LSI Nominations and Elections Chair, Christa Davis, presented the ballot for the 2012-2013 officers, and delegates completed ballots for the election of Treasurer. Here are the results. By acclamation the following officers were elected:

PRESIDENT:

Sandra T. Jimenez, CCLS, Imperial County LPA

VICE-PRESIDENT:

Mary J. Beaudrow, CCLS, Mt. Diablo LPA

EXECUTIVE SECRETARY:

Jennifer L. Page, CCLS, Marin County LPA

Elected by ballot:

TREASURER:

Heather Edwards, San Fernando Valley LSA

At annual conference, various competitions for membership, bulletin, history book, and the like are announced. This year, the membership contest panned out as follows: Group A (5 to 30 members) was won by Santa Maria LPA with a 42% gain; Group B (31 to 50 members) was won by San Francisco LPA with a 48% gain; Group C (51 to 75 members) was won by San Fernando Valley LSA with 54% gain; Group D (76 to 95 members) was won by Orange County with a 47% gain; and Group E (over 96 members) was won by SACRAMENTO LSA with a 34% gain!

Though this delegate cannot imagine a more beautiful and professional bulletin than *The Legal Eagle*, our sister association and the largest in the state, San Diego LSA prevailed and we placed second in the bulletin contest.

Sacramento also won a fee waiver for a CCLS examination registration.

Our Saturday night banquet included middle school dancers who danced to the tunes of the movie, "Grease" and wore period clothing, such

as the poodle skirts mentioned above. They were great - very talented and energetic! Saturday night also brings the announcement of the President's Award recipient, the new CCLSes receive their certificates, and the winners of the Chapter Achievement Point Contest are announced.

LSI Past President, Christa Davis, was the recipient of President Brooke Mansfield's President's Award. Christa has mentored and assisted Brooke throughout her years on the LSI Executive Committee.

Our own Elizabeth Gideon, CCLS, was unable to attend annual conference, but her name was announced just the same at the presentation of the CCLS certificates Saturday night. We missed you, Elizabeth; congratulations on your achievement!

Finally, Sacramento placed second for the annual Chapter Achievement Point Contest.

Sunday morning, at brunch, the new officers were installed. President Sandra T. Jimenez's theme is "Rise to the Challenge." Indeed, we can all rise to the challenges we all face.

Congratulations go to Astrid B. Watterson, CCLS, and her appointment as the LSI Parliamentarian! Additional kudos go to our president, Dawn R. Forgeur, CCLS, and her appointment as the Legal Specialization Section leader for Civil Litigation; and to Tammy Hunt, CCLS, on her appointment as the LSS Law Office Administration section leader.

Thank you for electing me as one of your delegates. I truly enjoyed myself, learned a little, and appreciated the opportunity to serve Sacramento LSA in this capacity.



Pictured from l to r: Astrid Watterson, CCLS, Sherri Lee Caplette, CCLS, Debbie Frias, CCLS, and Dawn Forgeur, CCLS.



Delegate Report LSI 78th Annual Conference

by Anne French



Anne French

This year's annual conference was held at the Bahia Resort in lovely San Diego. Starting on Friday, we had workshops in the morning. I attended the Day in Court/Lunch and Learn workshop during the first half and then the Programs workshop during the second half. SLSA will be bringing back lunch lessons this year and I wanted to get some ideas from other associations on what they were doing regarding continuing education for their members. The Programs workshop gave some great ideas regarding topics that were successful for their associations for their dinner meetings. I got some great ideas that I hope will be beneficial to our association.

The Friday night reception theme was Arnold's Diner. The conference theme for the weekend was a 50s era theme, so there were a lot of poodle skirts and pony tails at the reception. SLSA was supporting Heather Edwards as the new candidate for treasurer with LSI. We showed our support at her campaign table and wore campaign buttons to help endorse Heather for treasurer.

All day Saturday was the business of LSI in which only delegates are allowed to vote on behalf of their association regarding any LSI business, including our vote for LSI treasurer. SLSA had three delegates at the conference on their behalf: Debbie Frias, CCLS, Sheri Lee Caplette, CCLS and myself. I was fortunate to have a great pair of ladies to spend the weekend with at conference. Awards were handed out for each division of associations for their work during the past year. I'm happy to announce that SLSA won the membership contest for their division. Also, LSI gave three fee waivers to the following associations for a member of their association to take the CCLS exam. The three winning associations were Imperial County, Sacramento and Stockton. So if anyone is interested in taking the CCLS exam, you could have a chance to take it for free.

After a long day of meetings, we got to enjoy a wonderful banquet that night. The theme was Rydell Prom. There were beehive hairdos and cat eye glasses that filled the room. The best part of the night was the entertainment scheduled for the evening. Junior High students did their rendition of Grease. The kids were fabulous and did a phenomenal job.

The last event of the weekend was Sunday brunch. The theme was 50s business woman. There were a few pill box hats in the crowd. The new LSI board was inducted and LSI's new President is Sandra Jimenez, CCLS, from Imperial County LPA. Also, Heather Edwards won as LSI's new treasurer. Three members of our association have been selected to take chair positions with LSI. Our very own President, Dawn Forgeur, CCLS, will be the chair for the legal specialization section for Civil Litigation, Tammy Hunt, CCLS, will be the chair for Law Office Administration for the legal specialization section, and Astrid Watterson, CCLS, will be the new Parliamentarian for LSI. We should be seeing some great things happening from LSI's new board and chairs during the next two years.



Pictured below l to r: Anne French and Astrid Watterson, CCLS.



Pictured above l to r: Sherri Lee Caplette, CCLS and Heather Edwards.

Legal Procedures (cont.)

by *Lynne Gomes*

must conform their behavior to the same ethical obligations as an attorney. And while it is true that it is the attorney who ultimately faces potential disciplinary action or malpractice liability for a violation of ethics, support staff undoubtedly share an interest in avoiding ethics issues.

The most important thing to remember, is that everything you learn in the law office is confidential. Working in a law office is exciting, and you may learn all sorts of interesting things about prominent or well-known people in the community. It can be tempting to disclose some of this information to outsiders (including a spouse or family members). It is a natural response because it makes us feel important to be able to convey knowledge that others don't have. Revealing information obtained through your employment can be extremely harmful and/or hurtful to other people. Consider the following scenario:

One afternoon you see the son of an old friend of the family in the office who has an appointment for a legal consultation. You engage in a brief conversation about non-legal matters, say goodbye, and return to your desk. Two weeks later, you bump into the client's mother at the grocery store and during the course of conversation you innocently mention that you ran into her son at your office a couple of weeks ago. Knowing that you are employed with a criminal law defense firm, the client's mother then approaches her son about his reasons for being in your office and learns that he had recently been involved in a DUI incident. The client was a legal adult and had every right to keep the matter private (even from his own mother), but you have accidentally revealed this confidential information.

Besides being harmful, failing to maintain client confidentiality can also result in a complaint to the State Bar, or worse, a claim for malpractice against the attorney. Further, it could also mean discharge from your employment and the likelihood that you will not be hired by another law firm.

A situation that often arises with legal support staff is when family, friends, or acquaintances find out you are working in a law office and assume you must know all about the law and ask you for legal advice. Additionally, as a result of developing a good working relationship with clients, they may ask you questions that would require the legal advice or opinion of an attorney. The information you have learned while working for the lawyer can become such second nature that you may forget it can be construed as legal advice. Regardless of the confidence you may have in your response, answering such questions violates the unauthorized practice of law statutes (unless it is the exact legal opinion of the attorney and you have been given permission to communicate it). This includes the preparation of legal documents, which should always be under the direction, supervision and review of an attorney.

The responsibility for ensuring that legal support staff are in compliance with the Rules of Professional Conduct should not be absorbed only by the lawyer. Support staff need to insist on proper supervision, training, and review to protect not only the attorney, but themselves and the client. You are ultimately responsible for your own education, growth, and role in the law office. Don't be afraid to ask questions or seek the guidance of those who have more experience.

You are a professional in a professional field, representing a member of one of the oldest, most respected professions in civilized society. Always conduct yourself accordingly, with pride and integrity.

The 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."



May Regular Meeting Speaker Spotlight: Attorney Jennifer S. Rouse

by Deseree Gamayo



Deseree Gamayo

SLSA's May speaker was attorney Jennifer S. Rouse of Johnson Fort Meissner Joseph & Palley. She spoke to us about "What Every Estate Planning Attorney Wants Their Staff to Know."

Ms. Rouse has been practicing law in the Sacramento area for over thirteen years and is a Certified Specialist in Estate Planning, Trust, and Probate Law by the State Bar of California Board of Legal Specialization. She has been named a Northern California Rising Star by Super Lawyers magazine each year since 2010. Ms. Rouse specializes in estate planning, probate, conservatorships, special needs trusts, and trust administration. She has extensive experience with drafting estate plans and representing clients in administrative procedures, either as the fiduciary or a beneficiary.

Ms. Rouse gave an interactive and informational presentation on the staff's role in the firm. She went over the basics of estate planning, which included the difference between a will (does not avoid probate) and a trust (does avoid probate); the pros, cons, and process of probate and estate administration; information on a special needs trust; and the differences between conservatorships and guardianships. Ms. Rouse also went through the various terminology, forms, and deadlines that are required in estate planning and probate practice. On each subject she spoke about, there was information for the staff on ways that they can help their attorneys and clients.

She strongly suggested that everyone have some sort of estate plan in place for themselves, even if you create your own. She also had a few tips for us. When picking an executor, try and pick someone who is younger than you, someone who you trust, and someone who is decent with money. You can have more than one executor, but it can make the process take more time and can create more issues if the executors do not agree. If you would like to avoid having a family member or friend as your executor, you

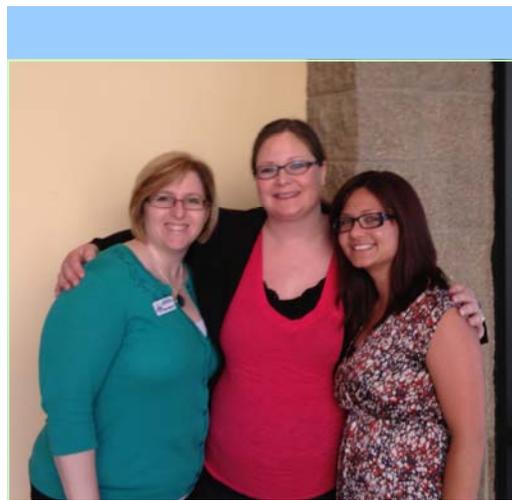
may hire a professional fiduciary to handle your estate.

SLSA appreciates Ms. Rouse taking time out of her busy schedule to come speak to our membership, and taking the time to answer everyone's questions in the short amount of time we had.



“When picking an executor, try and pick someone who is younger than you, someone who you trust, and someone who is decent with money.”

~Jennifer Rouse



Pictured below l to r: Dawn Forgeur, CCLS, Jennifer Rouse, and Deseree Gamayo.

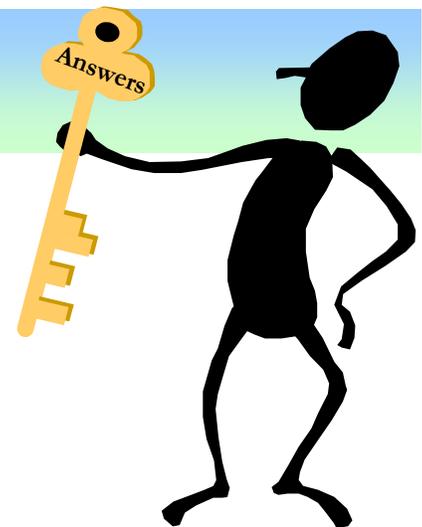
CCLS Terminology List

Affidavit	A declaration or statement of facts, made voluntarily and confirmed by the oath or affirmation of the party making it, taken before an officer having authority to administer such an oath.
Contempt of Court	Intentionally doing something which is against the court rules or which interferes with the administration of justice.
Hearsay	The repeating of what one heard another say.
Jurat	The clause appearing at the end of an affidavit reciting the date, location, and person before whom the statement was sworn.
Passim	Here and there; found in various places; everywhere. Used when a case is cited throughout a brief (five or six times), rather than list each page on which it is cited.
Perjury	The act of willfully making a false statement under oath.
Plagiarism	Taking all or part of the writing of another person and passing it off as your own.
Sanctions	A fine or penalty levied against a party or his/her counsel for violation of court rules or orders.
Testimony	Oral or written statements made by a witness under oath.
Tort	A legal wrong or injury.

CCLS Quiz Answers

CCLS QUIZ ANSWERS (from page 10):

- | | |
|----------------------------------------------------------|----------------------------------------------------------|
| 1. False, CA Rules of Professional Conduct, rule 1-310 | 6. (True, CA Rules of Professional Conduct, rule 3-320) |
| 2. (False, CA Rules of Professional Conduct, rule 2-100) | 7. (False, CA Rules of Professional Conduct, rule 3-510) |
| 3. (True, CA Rules of Professional Conduct, rule 2-400) | 8. (False, CA Rules of Professional Conduct, rule 3-700) |
| 4. (False, CA Rules of Professional Conduct, rule 3-100) | 9. (True, CA Rules of Professional Conduct, rule 4-300) |
| 5. (True, CA Rules of Professional Conduct, rule 3-210) | 10. (True, CA Rules of Professional Conduct, rule 5-100) |





Sacramento Legal Secretaries Association Membership Renewal Invoice

Membership Period: May 1, 2012 – April 30, 2013
Due Date: May 1, 2012

Make check payable to:
Sacramento Legal Secretaries Association

Amount Due: **\$40**
Renewals are due May 1, 2012.
There will be a late fee of \$5 after June 1, 2012.

Return the completed invoice and full payment to:
Deseree Gamayo, Treasurer
Sacramento Legal Secretaries Association
c/o Stone & Graves
2377 Gold Meadow Way, Ste. 210
Gold River, CA 95670

MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

NAME: _____

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? _____

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

June 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12 <i>Executive Board Meeting</i>	13	14	15	16
17	18	19	20	21 <i>Regular Dinner Meeting</i>	22	23
24	25 <i>Last Day to Submit Articles for Legal Eagle</i>	26	27	28	29	30

Dates to Remember

- **June 12 - SLSA Executive Board Meeting** (Location: *Stoel Rives* - Time: 6:00 p.m.)
- **June 21 - Regular Dinner Meeting** (Location: *Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.*)
- **June 25 - Last Day to Submit Articles for the July issue of The Legal Eagle**
- **July 9 - SLSA Executive Board Meeting** (Location: *Stoel Rives* - Time: 6:00 p.m.)
- **July 19 - Regular Dinner Meeting** (Location: *Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.*)
- **July 23 - Last Day to Submit Articles for the August issue of The Legal Eagle**



“
Please remember to support our vendors, because they support us!!
~Lynne Gomes
”

May Regular Meeting Vendor Spotlight: DeMichelle Deposition Reporters

by Lynne Gomes

“In deposition reporting, you require professionalism, dependability, availability and stability, as well as a quick turnaround. Anything else is just not acceptable!” These are the words our May Vendor of the Month, DeMichelle Deposition Reporters, lives by. DeMichelle Deposition Reporters is a professional, women-owned, family-owned company, serving the greater Northern California legal community since 1975.

Listed below are just a few of the comprehensive services DeMichelle offers:

- Reporters will travel to all cities in Northern California
- On-call reporter for last-minute deposition scheduling needs

- Weekend and holiday reporting by appointment only
- Realtime: Interactive Realtime Reporting
- State-of-the-art computer equipment
- High-Tech Computer Aided Transcription
- LiveNote
- Discovery ZX
- Summation
- CaseView
- E-Transcripts, Condensed Transcripts with Word Indexing
- Instant Rough Drafts
- Transcripts to CD, ASCII Disks, Min-U-Script or paperless copies
- 10-business day delivery, expedited, hourly, daily copy and prompt delivery of transcripts.
- In house transcribing services by our Certified Shorthand Reporters
- Transcribing: CD, cassettes, voicemail and text messages
- Mock trial and jury selection with video



DeMichelle
Deposition Reporters
Your One-Stop Deposition Agency since 1975!

888-709-0888 **www.demichelle.com**

“Centrally located between San Francisco and Sacramento proudly serving all of California. Tell us your preferred job location and we will locate and provide the conference room at no additional cost to you!”

“What’s your court reporting request? Our team thrives on making your deposition a success. Consider it done!”

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- ✓ Arbitrations / Hearings
- ✓ Board Meetings
- ✓ Transcribing
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Shanna DeMichelle-Zanone, Office Manager
shanna@demichelle.com

Tabitha Stewart, Scheduling & Production
depos@demichelle.com

Shelley Moon, Office Administrator
shelley@demichelle.com

Thank you very much to Shanna DeMichelle-Zanone and Shelley Moon from DeMichelle Deposition Reporters for being at our May meeting and talking to us about DeMichelle’s services, as well as being SLSA’s Vendor of the Month!

For more information on DeMichelle Deposition Reporters, please contact either Shanna or Shelley at:

Phone: 888-709-0888
FAX: 707-425-6019
www.demichelle.com



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McCullum Youth Court

by Michelle Chavez, CCLS

If I never had a chance to be at one of the conferences, or attend one of the SLSA dinners in 2011 when Michael Levy, President of the Sacramento County Bar Association spoke about McCullum Youth Court, ("MYC"), I don't think it would have made me any more prepared for volunteering with co-workers at MYC.

MYC is a nonprofit in Oakland that helps at-risk youth. Sanctioned by the Alameda County Superior Court, MYC enables youth who have committed minor offenses to be tried by a court of their peers. Sentences typically include community service, restitution and/or counseling. Virtually every aspect of the court is run by youth volunteers. The youth serve as the lawyers, bailiffs, court clerks and jurors. Adult community volunteers, including many lawyers and sitting judges, serve as judges for the program. The program provides the youth with a positive exposure to the justice system and many of the youth are inspired to pursue a career in law enforcement and the legal field.

MYC is a recognized diversion program under California law and the hearings are held in the courtrooms of the Alameda County Superior Court. Please visit their website below for more information: <http://www.youthcourt.org/>

I have had a fair amount of academic and practical experience since 1995 in the legal field, but there was NOTHING that could have prepared me for volunteering for the McCullum Youth Night Court on April 24, 2011, through my current law firm, Manatt, Phelps & Phillips in San Francisco.

When I volunteered, I knew the night would be "scripted". I thought there would be enough people from the office going, I would be in the "background" like when I had interned with Commissioner Josanna Berkow in the Family Law Department in Contra Costa Superior Court. We had people drop out last minute, and even with one of our paralegals and

one of attorneys coming to participate, I didn't think I would be wearing a judge's robe and sitting at the bench! It turned out to be the most impactful night I think I can remember in my recent career. They were all students about a year older or so than my fourteen year-old son. When it came time in the script to "give words of encouragement of [my] own," I found myself more than once hesitating to keep my composure and to keep my voice from shaking with emotion.

On the docket that night, we had two Battery cases and one Petty Theft case. I would hear one Battery and the Petty Theft case. The students who were acting as attorneys, bailiffs and court clerk, were very impressive and did an outstanding job. One the most interesting aspects of the program (part of the juveniles' sentencing) is to act as a juror at a future Court Night. Like any other jury, there were a few bored, disinterested, restless jurors. The Jurors were each allowed questions of the witness who was being sentenced for the crime. There were 5 to 6 for each case, and jury panels are usually rotated in and out per case if there are enough students. The questions were relevant and to the point, especially since the questions were directly from their peers - those who had sat in the same witness chair themselves.

Before volunteering, I hardly knew anything about the MYC program, or any of the programs that are referred to besides hours of community service that were part of the sentencing. One can only hope the night would have as much effect and would be appreciated by the students who were participating.

Unfortunately, I can't go into the details of those cases, but I can tell you it was a truly worthwhile volunteering opportunity. And a jury of your peers for sentencing can seem really harsh. But each person who was sentenced knew - whether they agreed with the sentencing or not - it was better than going to a roomful of adults in regular juvenile court appearance!



Michelle Chavez, CCLS



MCCULLUM YOUTH COURT

Proving the Power of Peer Justice Since 1994

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
24740 Oro Valley Road
Auburn, CA 95602**

<input type="checkbox"/> Northern California <input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, March 17, 2012 <input type="checkbox"/> Saturday, October 20, 2012
--------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------

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 \$25 late fee, in addition to the fees listed below, if space is available.

EXAMINATION FEES*			
	LSI MEMBERS**		Non-LSI MEMBERS
	Registration fee: \$ 15.00		Registration fee: \$ 55.00
	Examination fee: \$ 95.00		Examination fee: \$ 95.00
	Total \$110.00		Total \$150.00

Enclosed is a check in the sum of \$ _____^{***}, 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 \$25 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 _____

Beginning Legal Secretary

It's that time again - the start of the Beginning Legal Secretary course!

The Summer 2012 course has begun. As you can see from the picture, we have a full class with 32 students. This time, we have modified the course to include an additional week and include the California Style Manual as a textbook. We wish all of the new students the best during their studies!



The first day of class.



Students taking a quiz...



**LEGAL SECRETARIES, INCORPORATED
AUGUST 2012 FIRST QUARTERLY CONFERENCE
AUGUST 17, 18 & 19, 2012
BLUE RIBBON FAIR**

Hosted by:

**ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION AND
LIVERMORE-AMADOR VALLEY LEGAL PROFESSIONALS ASSOCIATION**

HILTON PLEASANTON AT THE CLUB, PLEASANTON, CALIFORNIA

CONFERENCE REGISTRATION FORM

Name (On Badge): _____
Mailing Address: _____
City/State/Zip: _____
Home Phone: _____ Work Phone: _____
E-mail Address: _____
Local Association: _____ LSA/LPA
(Full Name)

PLEASE CHECK IF APPLICABLE AND INCLUDE TITLE:

PLEASE CHECK IF YOU ARE:

State Officer : _____
 State Chairman: _____

Governor CCLS PLS

SCRIP (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET AND BRUNCH):

Postmarked on or Before July 27, 2012 \$108.00 \$ _____
Postmarked July 28, 2012 or later \$118.00 \$ _____

INDIVIDUAL TICKETS:

Registration by July 27, 2012 @ \$15.00 \$ _____
Registration (After July 27, 2012) @ \$25.00 \$ _____
Officer/Chairmen Luncheon** @ \$25.00 \$ _____
Friday Luncheon For State LSI Officers and Chairmen only
Welcome Reception (Friday) @ \$20.00 \$ _____
Governor's Luncheon (Saturday) @ \$25.00 \$ _____
President's Luncheon (Saturday) @ \$25.00 \$ _____
Membership Luncheon (Saturday) @ \$25.00 \$ _____
Saturday Night Banquet @ \$52.00 \$ _____
 BBQ Tri-tip Honey Ham Vegetarian Lasagna
Sunday Brunch @ \$27.00 \$ _____

TOTAL AMOUNT PAID: \$ _____

Special dietary request: _____

Please Make checks payable to and mail to: "AUGUST 2012 LSI QUARTERLY CONFERENCE"
Christa Davis, Registration Chair, 19827 Alana Road, Castro Valley, CA 94546

For General Information Contact Co-Conference Chairmen:

Cheryl L. Kent, PLS, CCLS - (925) 837-0585 -- Clkccls@comcast.net - Livermore-Amador Valley LPA
Mary S. Rocca, CCLS - (510) 865-0473 -- Marysrocca@aol.com - Alameda County LSA

NO REFUNDS AFTER JULY 27, 2012

LEGAL SPECIALIZATION SECTIONS Of LEGAL SECRETARIES, INCORPORATED

2011-2012 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**
5534 Blackbird Drive, Pleasanton, CA 94566

Enclosed is payment of my dues for the fiscal year 8/1/11 through 7/31/12 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 AMEX

Credit Card Information: Number _____ Expiration Date: Month _____ Year _____

Name on Credit Card: _____ **Card Verification Number** _____

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NEW	RENEWAL

- Civil Litigation
- Criminal Law
- Family Law
- Law Office Administration
- 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):

Governor's Report (cont.)

by *Melanie Herman*

the creation of the Ad Hoc Committee because, according to Robert's Rules of Order "A special committee may not be appointed to perform a task that falls within the assigned function of an existing standing committee." (RONR (11th ed.), p. 492, ll. 6-9.) After allowing for our newly appointed Parliamentarian, Astrid Watterson, CCLS, to review the necessary materials and give her advice, to the LSI President, the Chair agreed that the creation of the Ad Hoc Committee was in violation of LSI's Bylaws and directed the Executive Secretary to make a note of such in the Minutes. Make note that the Point of Order was not called on the entire motion, just the creation of the committee, so all other aspects of the motion remain and will fall on LSI's (standing) Marketing Committee to execute.

There was so much action and many memories made at LSI's 78th Annual Conference. I am truly honored that you have elected me as your Governor and have given me the opportunity to meet so many great professionals. In an effort to comply with our Editor's requests, I was unable to provide you with all the details, so please feel free to contact me if you would like some additional information or have any questions or concerns as it relates to the business that went on at Conference.

LSI's first Quarterly Conference is in Pleasanton, a short hour and thirty-seven minutes from Sacramento, I hope to see more SLSA members there!

“
There was so much
action and many
memories made at
LSI's 78th Annual
Conference.
~Melanie Herman
”

Happy June Birthdays!!

Sandra Andrade	June 3	Julia Diles	June 19
Cynthia Palmer	June 3	Yolanda De La Cruz	June 22
Tiffani Redo	June 4	Tess Benzel	June 23
Anne French	June 6	Maimie Chyinski	June 23
Andrea Stoll	June 6	Pamela Spring	June 25
Lelia Jackson	June 7	Crystal Rivera	June 27
Betty Hamilton	June 8	Jamie Gifford	June 29
Alicia Amaro	June 12	Debbie Frias, CCLS	June 30
Pamela Janz	June 17		

LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	UNIT PRICE	QUANTITY	TOTAL
BRASS TACKS* A guide instructing local officers and chairmen on how to perform their respective duties. Contains check lists, calendars and forms. (Rev. 1/2010) No charge for PDF [] Send hard copy []	\$ 5.00		\$
CAREER PROMOTION/SCHOLARSHIP <i>NOT JUST A SECRETARY</i> BOOKLET Currently under revision and not available at this time			
CCLS BROCHURE 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		
CCLS MOCK EXAM (Revised 2010) Sample questions and answers to assist in preparing for all sections of the CCLS Exam.	25.00		
CCLS PIN A ½" high, 10-karat gold-filled pin with CCLS logo. For the CCLS.	35.00		
CCLS STUDY KIT Contains Mock Exam (see above), Gregg Reference Manual with Instructor's Resource Guide, Basic and Comprehensive Worksheets.	199.00		
GUIDELINES FOR HOSTING LSI CONFERENCES* An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI Conference. (Rev. 12/09)	N/C		
GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM A 34-page guide, with sample forms, to assist with the planning and execution of a successful legal educational program. (Rev. 8/03)	5.00		
HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND GUIDELINES* A booklet with step-by-step directions, including rules and examples, for preparing a History Book for entry in the LSI History Book Competition. Created for local association historians and/or presidents. (Rev. 11/08)	5.00		
HISTORY OF LEGAL SECRETARIES, INCORPORATED A 50-page memory of people, places and events since 1929. (Rev. 3/2010)	5.00		
LAW OFFICE PROCEDURES MANUAL FLYER An 8 ½" x 11" advertisement of the LOPM. Includes listing of contents and Order Form. (Rev. 1/2010)	N/C		
LAW OFFICE PROCEDURES MANUAL INSTRUCTOR'S GUIDES To assist instructors in conducting training classes. Teacher Training Chapter offers tips for teaching. Other Guides supplement Chapters of the LOPM and contain projects, instructions to student, completed and blank legal forms, exams and answer keys.			
TEACHER TRAINING CHAPTER (Rev. 9/07)	4.00		
ADOPTIONS CHAPTER (Rev. 6/11)	7.00		
CIVIL PROCEDURE CHAPTER (Rev. 9/07)	7.00		
CONSERVATORSHIP CHAPTER (Rev. 6/11)	7.00		
CORPORATIONS CHAPTER (Rev. 6/11)	7.00		
COURT STRUCTURE CHAPTER (Rev. 9/07)	7.00		
CRIMINAL LAW CHAPTER (Rev. 9/07)	7.00		
DISCOVERY CHAPTER (Rev. 6/11)	7.00		
FAMILY LAW CHAPTER (Rev. 6/11)	7.00		
PROBATE CHAPTER (Rev. 9/07)	7.00		
REAL ESTATE CHAPTER (Rev. 6/11)	7.00		
UNLAWFUL DETAINER CHAPTER (Rev. 6/11)	7.00		
WORKERS' COMPENSATION CHAPTER (Rev. 9/07)	7.00		
MISCELLANEOUS CHAPTER (Rev. 6/11)	7.00		
LEGAL SECRETARY'S REFERENCE GUIDE A legal procedure guide designed to assist local associations in conducting a training class. Also useful for training office personnel and as a general reference for experienced staff. (Rev. 11/09)	30.00		
LSI BYLAWS AND STANDING RULES* As currently adopted by the LSI Governors.	5.00		
TOTAL THIS PAGE			\$

*Item available to LSI members only.

LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	UNIT PRICE	QUANTITY	TOTAL
LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER An 8 1/2" x 11" advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/2010)	\$ N/C		
LSI LEGAL SPECIALIZATION SECTIONS BROCHURE Lists Sections offered and reasons for joining. Includes Section Membership Application. (Rev. 2/08)	N/C		
LSI MEMBERSHIP BROCHURE Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application. (Rev. 2/08)	N/C		
LSI MEMBERSHIP PIN* (Magnetic) A 3/4" high oval gold-tone pin with blue and white enamel overlay. LSI logo in center and "Legal Secretaries, Incorporated" inscribed on circumference. For all LSI members.	5.00		
LSI ROSTER* Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.	N/C		
MEMBERSHIP APPLICATION FORM* 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	
NEW MEMBER PACKET* A 2-pocket folder containing letter from LSI President, LSI membership information, Specialization Sections Membership Application, list of benefits and providers, CCLS information, Legal Professional's and Law Office Procedures Manual flyer and Code of Ethics. Local associations may insert additional material. For new local association members only.	N/C		
PRESIDENT'S PENDANT* 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		
PRESIDENT'S PIN* Same as pendant (see above). Specify magnetic or pin back. [] Magnetic [] Pin back closure	7.00		
TOTAL THIS PAGE			\$
TOTAL PREVIOUS PAGE +			\$
TOTAL ORDER =			\$
MAILING/SHIPPING AND HANDLING (15% OF TOTAL ORDER) +			\$
SUB-TOTAL, INCLUDING MAILING/SHIPPING AND HANDLING =			\$
CALIFORNIA SALES TAX (7.25% OF SUB-TOTAL ABOVE) +			\$
TOTAL DUE =			\$

PLEASE LIMIT THE QUANTITIES OF NO-CHARGE ITEMS ORDERED TO MINIMAL IMMEDIATE REQUIREMENTS. COMPLETE PAYMENT INFORMATION BELOW AND MAIL COMPLETED ORDER FORM TO LEGAL SECRETARIES, INCORPORATED, CORPORATE OFFICE, PO BOX 660, FORTUNA, CA 95540-0660; OR, FAX TO (707) 682-6888. CHECK OR CREDIT CARD INFORMATION MUST BE INCLUDED. ORDER WILL BE MAILED OR SHIPPED WITHIN 10 DAYS OF RECEIPT, SUBJECT TO AVAILABILITY.

DELIVER TO: NAME _____ ASSOCIATION _____

ADDRESS _____ CITY _____ STATE _____ ZIP _____

DAY TELEPHONE (_____) _____ E-MAIL _____

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** _____

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*Item available to LSI members only.

(Prices effective 07/01/2011)

BENEFITS

LEGAL SECRETARIES INCORPORATED (LSI)

Note: This list is maintained for use by members of Legal Secretaries, Inc. Agents for insurance and financial providers are available as resources when members inquire about benefits. Please use this as a starting point; ask for information, compare policy coverage and prices. LSI wants its members to find the BEST coverage for each member's individual needs and location. For information call these representatives directly.

<p>DISCOUNT THROUGH CEB</p> <p>Members of Legal Secretaries, Incorporated are offered a reduced cost for certain educational benefits (seminars, publications) through Continuing Education of the Bar. For more information, visit http://ceb.com/LSI/</p>	<p>WORKING ADVANTAGE Toll Free: (800) 565-3712 www.workingadvantage.com Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more. Member ID: Contact LSI Corporate Office, lsiorg@suddenlink.com, or LSI Vice President</p>
<p>HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com</p>	
<p>INSURANCE AND FINANCIAL PROVIDERS</p>	
<p>AFLAC AND WORKER'S COMPENSATION QUOTES Steven C. Dannenberg (Independent Broker) 11091 Rhyolite Drive, Suite 4 Redding, CA 96003 Direct: (530) 339-5889 - Office: (530) 243-9879 Fax: (530) 243-9880 E-mail: dannenberginsurance@gmail.com Offering supplemental insurance for Accident, Sickness, Cancer, Dental, Hospital Indemnity and Heart Attack/Stroke.</p>	<p>CAPITAL INVESTMENT ADVISERS Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 www.ciadvisers.com Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>
<p>DWORKIN INSURANCE SERVICES Earl Dworkin 467 Hamilton Avenue, Suite 1 Palo Alto, CA 94301 Office: (650) 329-1330 or (800) 332-4313 Fax: (650) 329-9957 www.dworkininsurance.com Offering Individual and Family Medical Insurance, Travel Medical, Medicare Supplements, Dental Plans, and Part D Prescription Drug Plans</p>	<p>LEGACY WEALTH MANAGEMENT Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz Offering discounted John Hancock Long Term Care Insurance and Life Insurance, Annuities, Retirement, Investment and Estate Planning, Mutual Funds, and 401K.</p>
<p>DAVID WHITE & ASSOCIATES Wealth Accumulation and Preservation 3150 Crow Canyon Place, Suite 2000 San Ramon, CA 94583 (800) 548-2671 Contact: Ryan Gonzales (ext. 2682), rgonzales@dwassociates.com, or Matt Kay (ext. 2628), mkay@dwassociates.com Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance.</p>	<p>MWG FINANCIAL AND INSURANCE SERVICES Jory Wolf, President/Founder 6333 Greenwich Drive, Suite 210 San Diego, CA 92122 Office: (858)888-7300 Cell: (510)919-9062 jory@mwgfinancial.com California Insurance License: 0E88330 Individual disability insurance solutions</p>
<p>CREDIT UNIONS</p>	
<p>LA FINANCIAL FEDERAL CREDIT UNION P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p>PROVIDENT CREDIT UNION 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 www.providentcu.org All LSI members are eligible to join.</p>

QUESTIONS AND CONCERNS CONTACT:
Sandra T. Jimenez, CCLS, LSI Vice President
LSI Marketing Committee Coordinator
P.O. Box 58, Seeley, CA 92273
Cell - (760) 604-3057

**LEGAL SECRETARIES, INCORPORATED
MEMBERSHIP LIST AS OF 4/30/12**

Total Members (Fiscal Year-end 4/30/11)	Association		New Members	Transfer Members	Continuing Members	Total Members
42	Alameda County	LSA	3		34	37
0	Antelope Valley	LSA	2		8	10
50	Beverly Hills/Century City	LSA	5		39	44
22	Butte County	LPA	1		18	19
28	Capitol City	LPA	1		16	17
6	Conejo Valley	LPA	2		5	7
17	Desert Palm	LPA	6		15	21
16	El Dorado County	LPA	2		19	21
49	Fresno County	LPA	8	-1	38	45
48	Humboldt County	LPA	5		35	40
37	Imperial County	LPA	14		26	40
27	Livermore-Amador Valley	LPA	6		21	27
64	Long Beach	LSA	20		52	72
46	Los Angeles	LSA	7		36	43
17	Marin County	LPA	5		12	17
38	Merced County	LPA	10	1	33	44
14	Monterey County	LSA	0		5	5
62	Mt. Diablo	LPA	19		54	73
15	Napa County	LSA			13	13
78	Orange County	LSA	44		50	94
25	Palo Alto	LSA	1		13	14
39	Placer County	LPA	5		15	20
19	Redding	LPA			9	9
17	Rio Hondo District	LPA	6		15	21
20	Riverside	LPA	4		17	21
181	Sacramento	LSA	55		109	164
239	San Diego	LSA	64	1	146	211
34	San Fernando Valley	LSA	35		30	65
43	San Francisco	LPA	22		24	46
31	San Gabriel Valley	LSA	14		19	33
77	San Mateo County	LSA	8		60	68
26	Santa Barbara	LSA	4		22	26
59	Santa Clara County	LSA	35		46	81
8	Santa Cruz County	LPA			7	7
16	Santa Maria	LPA	5		7	12
39	Sonoma County	LSA	5		30	35
12	Southern Butte	LSA	4		8	12
36	Stanislaus County	LPA	5		36	41
29	Stockton-San Joaquin	LPA	6		42	48
4	Trinity County	LSA	0		4	4
22	Ventura County	LPA	3		20	23
36	Members at Large			-1		28
1688	YTD TOTALS					1678



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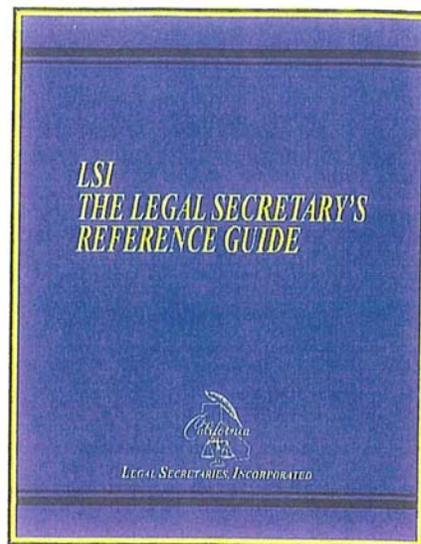
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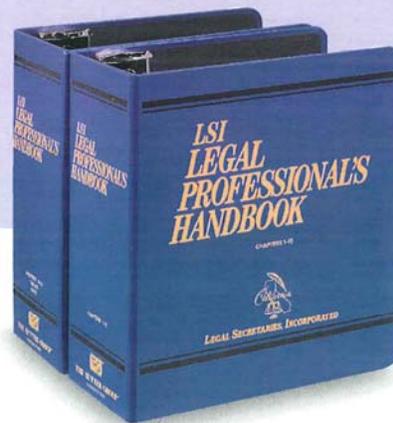
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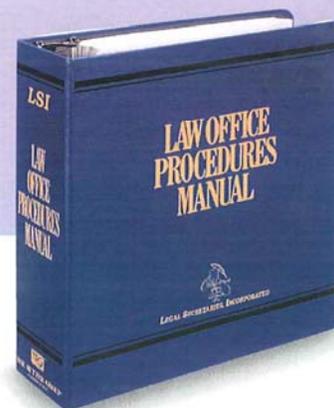
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by *Liz Gideon, CCLS*

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