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# Sacramento Legal Secretaries Association



## THE LEGAL EAGLE



## March Event(s)

- **March Regular Dinner Meeting – March 15.** 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](http://www.slsa.org)) or contact Maimie Chyinski at [reservations@slsa.org](mailto:reservations@slsa.org). *See page 18.*
- **SLSA Election Results – March 15.** Remember to vote and mail in your signed ballots!

## 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!**





“  
 It is important that  
 you, the member,  
 take part in the  
 running of this cor-  
 poration!  
 ~Dawn Forgeur,  
 CCLS  
 ”

## President's Report

by Dawn Forgeur, CCLS

**O**n February 16, 2012, SLSA held its annual Federal Day in Court event which was a great success! Thank you to all of our speakers for speaking to our members. In this edition of The Legal Eagle is Rebecca Lerma's article recapping this event and there is also a listing of the vendors who came out and participated. Thank you to our Day in Court Chairs, Rebecca Lerma and Crystal Rivera, for putting together the January and February Day in Court events, which take time and coordination to make sure that SLSA has court representatives and vendors available for your benefit.

Nominations were held at our February regular dinner meeting. In case you were not present, the nominees presented at the February meeting are:

**President:**

- Dawn R. Forgeur, CCLS

**Vice President:**

- Lynne Gomes

**Secretary:**

- Maimie Chyinski

**Treasurer:**

- Deseree Gamayo

**Governor:**

- Melanie Herman

**Delegate for Annual Conference:**

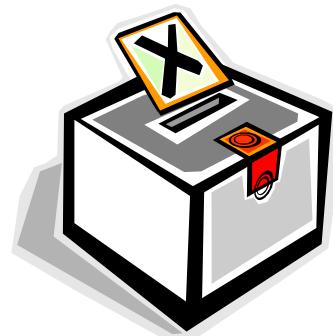
- Launa Atkinson, CCLS
- Elizabeth Bomke, CCLS
- Sherri Lee Caplette, CCLS
- Anne French
- Debbie Frias, CCLS
- Paula Lockard, CCLS
- Jennifer Rotz

The ballots were mailed out on February 28, 2012, to all active members and they are due to the Nominations and Elections Committee before our March 15, 2012, regular dinner meeting. Please be sure to read the biographies for each nominee, vote, and return your signed return envelope to the Committee. Good luck to all nominees!

Thank you to all of the members who stayed for the business portion of the meeting in February, it was appreciated. I know it was a long night and I try not to have our meetings run so late, but sometimes there are

items of such importance that we cannot move them to the next regular meeting. It is important that you, the member, take part in the running of this corporation!

Please contact me if you have any questions and I look forward to seeing you at the March regular dinner meeting.



## 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.

## Of Note

by Alex Cain



**A**lthough not as common, you may need to serve a party via service by publication. When it comes time to default parties served in this manner, it is very helpful to the clerks if they're provided the Proof of Service and a copy of Government Code, section 6064. Government Code, section 6064 states that the defendant has 30 days after the 28<sup>th</sup> day of the first publication to respond.

Providing the mentioned copies may alleviate any problems with when the clerks would need to count from in order to timely enter your default.

Effective immediately, the United States Bankruptcy Court, Eastern District of California, has implemented a new, toll-free phone number for the e-Filing Help Desk. The new number, 1-855-542-0992, will replace the current toll-free phone number of 1-877-875-7823. Help Desk hours will remain between 9 a.m. and 4 p.m., Monday through Friday, excluding holidays. Only calls related to electronic filing will be returned.

## Legal Procedures: Service by Publication

*submitted by Melanie Herman*

**A**nother method of service of the summons and complaint authorized by the Code of Civil Procedure is by publication of summons in a newspaper of general circulation. This is usually a "last resort" option. Unlike the other methods, a court order must be obtained before attempting service by this method. (Code Civ. Proc., § 415.50.)

### Procedure For Obtaining Court Order

An affidavit must be prepared containing certain facts, and must be submitted to the court at an ex parte hearing. If the judge is satisfied with the contents of the affidavit, it will order the defendant to be served by publication and mailing.

#### Affidavit requirements:

The affidavit for publication of summons must be by a person who is a competent witness to the following facts. (Code Civ. Proc., § 415.50(a).)

The first requirement is a showing that reasonable attempts have been made to serve the defendant in some other authorized manner, which includes an attempt at service by mail and acknowledgment of receipt to defendant's mailing address, even if it is only a post office box. Attempts should also have been made to learn about the defendant's whereabouts by inquiry of relatives

and investigation of city and telephone directories, and assessor's office property records. (California Practice Guide Civil Procedure Before Trial, § 4:248.)

The affidavit must also allege either: 1) A cause of action exists against the defendant (or he is a necessary party to such action); or 2) Defendant claims an interest in real or personal property subject to the court's jurisdiction, and/or plaintiff seeks to exclude defendant from such property. (Code Civ. Proc., § 415.50(a).)

#### Content Of Court Order

The court will order the summons published in a designated newspaper that is "most likely to give actual notice" to the defendant. (Code Civ. Proc., § 415.50(b).) Any California newspaper of general circulation is acceptable, although most lawyers request the court to designate one of the legal newspapers. (California Practice Guide Civil Procedure Before Trial, § 4:269.)

If the party to be served resides or is located outside California, "the court may also order the summons to be published" in an out-of-state newspaper that is "most likely to give actual notice." (Code Civ. Proc., § 415.50(b).)

**Duration And Frequency Of Publication:** The order will direct publication once a week for four

See Legal Procedures, Page 16

# Membership Chair Report

by Lynne Gomes

## *Condolences:*

To SLSA member Beckie Hoff -- On the loss of her beloved husband, Ron, who was 53 years young. He was diagnosed with Bulbar ALS a little over a year ago, and passed away peacefully on January 21, 2012. Please keep Beckie and her family in your thoughts and prayers.



The Rutter Group (from LSI President Brooke Mansfield-Atherton, CCLS):

It is with a heavy heart that I inform you of the passing of Bill Rutter. As you know, LSI has enjoyed a long relationship with The Rutter Group/Thomson Reuters for many years, and their Executive Director & General Manager, Kalman Zempleny II is an honorary member of LSI.

The passing of Mr. Rutter is a great loss to our friends at TRG. I am sure that Kalman and his team at TRG would appreciate hearing from their LSI family during this sad time. The address is: Kalman S. Zempleny II, Esq., The Rutter Group, 15760 Ventura Boulevard, Suite 630, Encino, CA 91436-3260.

Kalman sent an e-mail notifying us that Mr. Rutter passed away on February 2, 2012, with his wife, Sally, the love of his life, and all his children, by his side. A memorial service celebrating Bill's life was held on February 18 in Los Angeles.

To LSI's Legal Procedures Chair, Rod Cardinale, Jr. -- On the loss of his father, Rod Cardinale Sr. Condolences may be sent to: Rod Cardinale, Jr., 480 Ella Drive, San Jose, CA 95111.

To Barbara Barregar (LSI Legal Procedures Chair, 2008-2009) -- On the loss of her father, Blake D. Barregar. Condolences may be sent to: Barbara Barregar, 7985 E. Viewrim Drive, Anaheim Hills, CA 92808.

## *Congratulations:*

To Jean Colegrove, last year's SLSA scholarship winner, on the completion of her studies!

To Ileah Miller (formerly Waltman), on her recent nuptials!

To Lindsey Perry, on the anticipated birth of her little one in August 2012!

## *On the Move:*

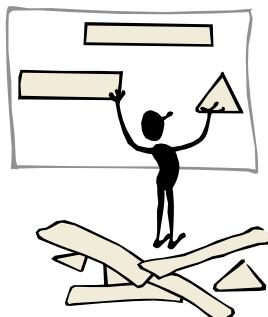
Jennifer Estabrook, CCLS, is now at the law offices of Myers Nave.

Kathryn DeLisle is now at the law offices of Shaw Valenza.

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## NEWS?? CHANGES?? UPDATES??

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



# Employment Report/Positions Available

by Jaymie Moralez



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

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

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

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

- **(2/14/12) Legal Secretary** Needed Immediately for Folsom Firm! Legal Secretary to support 1 partner and 1 to 2 associates. Applicants are required to have at least 4 years of legal secretary experience in litigation. Duties include transcription, preparing draft pleadings and discovery, preparing complaints for filing and service, setting ex parte hearing dates and heavy calendaring. Current knowledge of e-filing, calendaring, court rules, both federal and state, along with experience with trial preparation, motions, briefs, tables of contents and authorities is an absolute requirement. Must be proficient in Timeslips, Abacus, Legal Solutions and MS Office, including Word, WordPerfect and Outlook. It is essential that you have strong communication skills, both written and verbal, good problem solving skills and a drive to look for answers and think on your feet. Must be organized, able to multi-task and manage your time, and able to work with a high degree of accuracy and extraordinary attention to detail in a fast paced environment. Please send resume, cover letter and salary requirements to [mbb@fbmllp.com](mailto:mbb@fbmllp.com).
- **(2/8/12) Job Notice/Office of Legislative Counsel POSITION: LEGAL SUPPORT SUPERVISOR II** -- The Office of Legislative Counsel is a small civil service agency whose mission is to provide legal services and data processing support services to the State Legislature. Employees are excluded from collective bargaining and, therefore, receive enhanced benefits and do not contribute fair share.

**DUTIES OF THE POSITION:** The incumbent oversees and coordinates the workflow of approximately 35 support staff and 2 Legal Support Supervisor Is across two shifts who perform proofreading and bill correction duties of legislative materials for publication at the Office of State Publishing to ensure that deadlines established by the nature and needs of the legislative calendar are met. Allocates resources and determines support staffing needs for each legislative session in conjunction with the Legal Office Administrator I to provide excellent customer service. Participates in recruitment, selection, and promotional processes and participates in strategic planning for Office of Legislative Counsel. Communicates policies and procedures to support staff. Reviews performance of Legal Support Supervisor Is, and provides appropriate guidance and training. Communicates with the Assembly and Senate Enrolling and Engrossing Offices regarding bills for enrollment. The incumbent works overtime on short notice, weekends, and holidays and, during busy periods of the legislative calendar, may work 7 days a week.

**DESIRABLE QUALIFICATIONS:** Knowledge of the Office of Legislative Counsel and the legislative processes; excellent organizational and interpersonal skills; the ability to reason logically, identify and resolve problems effectively, and work effectively under demanding circumstances and constraints; and the willingness and ability to communicate with all levels of office personnel, Members of the Legislature and their staff, and to work overtime as required by fluctuating workload demands.

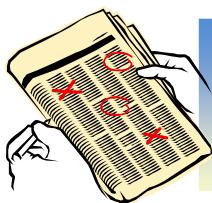
**WHO MAY APPLY:** Individuals who are eligible for a list appointment, lateral transfer, or on a Reemployment List, SROA list, or employed with a Surplus Department/Agency. Applications will be screened and only the most qualified individuals will be contacted for an interview. Please specify on your application the basis for your appointment eligibility. **APPLY BY:** Friday, February 17, 2012

**IF YOU ARE INTERESTED:** Submit a standard state application to Office of Legislative Counsel, Attn: Human Resources, 925 L Street, Suite 900, Sacramento, CA 95814. If you have questions regarding the position, please contact Mary Kelley at (916) 341-8060.

# Employment Report/Positions Available (cont.)

by Jaymie Morales

- **(2/2/12) Legal Secretary/Paralegal** Needed Immediately for Rapidly Expanding Roseville Firm! Legal Secretary/Paralegal to support 1 to 3 associates needed. Must have at least 2 years of heavy litigation experience, including heavy calendaring duties using rule sets (Abacus or other comparable program). Must be able to transcribe if necessary, prepare draft pleadings and discovery templates, prepare complaints for filing and service, set ex parte hearing dates (very heavy ex parte calendar), filing in various counties as well as e-filing in both state and federal courts and appellate district courts. Must be flexible to changing priorities, work well when given instructions, and have a good humor about it. Must be able to keep up on case management of attorneys' files as well as maintaining case files. Must be able to type at least 60 words per minute. Must be willing to take initiative and not wait to be asked to complete tasks, although asking questions for proper procedures is welcome! Must have excellent writing and communications skills to deal with opposing attorneys and their staff, court staff, and clients. Please send resume in confidence to [joymorgan@unitedlawcenter.com](mailto:joymorgan@unitedlawcenter.com).
- **(1/27/12) Legal Assistant** Education reform non-profit seeks full-time Legal Assistant to support the General Counsel. The Legal Assistant will prepare highly confidential legal documents, gather/analyze data, and perform administrative duties. At least 5 years experience and bachelor's degree required. Must be very detail-oriented and reliable. Compliance/non-profit/political experience helpful. Competitive salary and benefits. Job location is Sacramento. Please apply at [www.StudentsFirst.org/Jobs](http://www.StudentsFirst.org/Jobs).
- **(1/11/12) Legal Secretary** Small plaintiff's office (two attorneys, one legal assistant) seeks full time legal secretary. Work does not involve generic personal injury cases (auto, etc.). Rather, highly sensitive cases that require sensitivity and some psychological awareness. Superb typing, transcription and computer skills are more important than legal experience, as long as applicant is 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](mailto:jgeorgejr@psyclaw.com).
- **(1/4/12) Paralegal/Legal Secretary** Immediate need for seasoned Paralegal/Legal Secretary in the Sacramento area. Boutique law firm specializing in Civil Litigation looking for Paralegal/Legal Secretary with a minimum of 5+ years as a Paralegal/Legal Secretary. Litigation and some Transactional work. There are 10 attorneys total over 3 offices. Position to be based out of Sacramento with occasional travel to Stockton Office; needs a self starter, someone who does not leave anything imperfect or incorrect. The cases are very interesting and there is a lot to do - never a dull moment. Base pay 40 - 50K with bonuses. Potential 60 - 80K with bonus. No gaps in employment. Prefers someone currently employed and looking to make a change. Email resume directly to: [ihamilton@appcone.com](mailto:ihamilton@appcone.com).
- **(11/16/11) Experienced Legal Secretary** - Probate Court - Small firm on University Ave. has an immediate need for a Legal Secretary experienced in matters under the probate court, especially probates, conservatorships and guardianships. The ideal candidate will have a professional and pleasant demeanor to interact with clients. This person needs 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](mailto:HLOPC.HR@gmail.com).
- **(11/16/11) Legal Secretary** Our confidential client in Sacramento has an immediate opening for a highly-skilled and ambitious medical malpractice legal secretary for a contract position, with the potential to become full-time. This position involves reviewing and summarizing medical records; reviewing/propounding discovery; summarizing depositions; working with experts and handling research/writing. Legal secretaries applying for this opportunity must have a minimum of 1 year of experience with medical malpractice litigation. Candidates with these qualifications should email their resumes to Maria C. Afan at [maria.afan@roberthallegal.com](mailto:maria.afan@roberthallegal.com) for immediate consideration.



# Help Wanted

# Parliamentarian's Corner

By Astrid Watterson, CCLS

## Robert's Words to Use Without Needing to be Recognized:

In any organized meeting, parliamentary procedure is necessary to protect the rights of all members and to allow an effective method of leading a group. Within our association, we adhere to Robert's Rules of Order to help guide our meetings. When making a motion you need to wait to be recognized by the chair (the President) and then you can speak. However, there are occasions when you don't need to wait to be recognized to speak. Those few instances are:

- When you appeal the decision of the chair. Stand up and say: "I appeal from the decision of the chair."
- When you don't believe in the accuracy of a vote. Yell out: "Division!"
- When you have a parliamentary inquiry. Stand up and say: "A parliamentary inquiry, please."
- When you think the rules are being broken. Stand up and say: "Point of order!"

When you need information, usually pertaining to the motion on the floor. Stand up and say: "I have a request for information."

However, as with many things in life, even though you have the weapon or the knowledge in this case, does not mean you should use it casually. Before shouting anything during a meeting, think it through. What

are you trying to accomplish? Are you intentionally trying to disrupt the meeting or are you genuinely concerned that the rules have been violated or that the vote was not accurate? Keep in mind that the President's duties are to the membership. If for example, when calling for a vote, the chair can't tell if there is a majority one way or another because it appears to be too close to tell, before yelling out "Division!", the chair will announce that an accurate vote cannot be taken through this method and will ask for a different type of voting to be conducted. It could be a count or a voice vote. Give the chair a moment to collect herself and weigh her options before shouting out anything. One more thing to keep in mind before implementing the shout-outs, be ready to back it up. For example, if you yell out "Point of Order!", be ready to tell the chair which rule you believe is being broken. You don't get to yell out the rules are broken, the rules are broken, and then not say *which* rule is broken.

There is a time and place for everything. Use your words carefully. Follow along in a meeting and if you have questions, ask them. Participate in the discussion and get involved in the association. Finally, keep in mind the goals of this association:

- To unite in one association persons engaged in, or interested in, any phase of legal work;

- To establish good fellowship among members of this association;
- To stimulate a high order of business and professional attainment;
- To further our knowledge of law and its procedure and to uphold its honor and dignity;
- To further our knowledge of governmental, education, and public affairs;
- To create a high standard of ethics among our members and to further the interests of legal secretaries;
- To cooperate with the various Bar Associations, Legal Secretaries Associations, and LSI; and

To disseminate information and knowledge of interest to our members.

(SLSA Bylaws Article III.)

As always, if you have any questions, please feel free to contact me.

**Follow along in a meeting and if you have questions, ask them.**

**~Astrid Watterson,  
CCLS**



# SLSA's Federal Day in Court

by Rebecca Lerma

**S**LSA's annual Federal Day in Court event was held on Thursday, February 16, 2012, at the Hilton Arden West.

We sold out the event this year with 97 attendees! It looks like we've outgrown our typical room for this event and will need to upgrade, which is a good problem to have. We were honored to have

speakers from the U.S. District Court, Eastern District - Honorable Carolyn Delaney, Magistrate Judge, Wim Van Rooyen, Law Clerk and Dawn Waggoner, Operations Manager as well as the U.S. Bankruptcy Court for the Eastern District - Sandy Gettler, Bankruptcy ECF Liaison & Training Specialist, and Nicole Sanchez-Gargalikis, Bankruptcy Operations Help Desk Analyst.

Each court addressed changes to hours or locations, local rules, fees, forms and procedures, provided tips on common filing mistakes, and answered audience questions. Here's a bit of information I learned from Magistrate Judge Carolyn Delaney that you won't see in a judicial profile. Magistrate Judge Delaney's biggest pet peeve is rudeness directed to her court staff. She said that situations like that go immediately to her chambers, and you don't want that to happen. She began her legal career as a legal secretary and paralegal and holds legal professional staff in high regard. Her second biggest pet peeve is rudeness between counsel. She does not believe it

further either client's cause and can in fact hinder it.

Law Clerk van Rooyen also discussed Joint Statements as they are a pleading that attorneys often get wrong. Joint Statements should not be a Motion and Opposition. The goal of a Joint Statement is to only have to look at one document. You should not try to circumvent the local rules by submitting multiple declarations. One declaration per side to authenticate documents is fine. Also, be sure to provide a brief case and procedural background in a discovery motion as this may be the first time the magistrate judge touches the file.

Our Bankruptcy Court speakers addressed common mistakes in online filings. They clarified that unlike the District Court, they do not need any courtesy copies and any submitted will be recycled. They also addressed their new claim forms, which are not able to be saved or downloaded, however you can print out so that your attorney can fill in the required information on paper instead of looking at it over your shoulder. Ms. Sanchez reiterated her offer to walk us through

any filings on the phone and always returns all calls the same day you leave a message, even if she needs to stay after hours to do so.

This concludes our Day in Court events for this fiscal year. I hope you found them worthwhile. These events aren't put together overnight and begin five months pre-event and could not be done without excellent support and teamwork. Thank you to my co-chair Crystal Rivera, who lived up to her promise made a year ago that she would co-chair and do all of the work so long as I handled the public speaking. I would also like to thank the volunteers who manned the registration tables, Registration Chair Maimie Chyinski, Jennifer Shelton, Mickey Scott, Debbie Fries, CCLS as well as Jacob French, who was our runner/photographer for January's event. Special thank you to SLSA President Dawn Forgeur, CCLS who is always willing to lend a hand where needed, and conveniently is a shout away from my office.



## Speakers Present:

U.S. District Court, Eastern District:

- Honorable Carolyn Delaney, Magistrate Judge
- Wim Van Rooyen, Law Clerk
- Dawn Waggoner, Operations Manager

U.S. Bankruptcy Court for the Eastern District:

- Sandy Gettler, Bankruptcy ECF Liaison & Training Specialist
- Nicole Sanchez-Gargalikis, Bankruptcy Operations Help Desk Analyst





**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  
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](http://www.lsi.org); or, TRANSMIT A COPY OF THIS ENTIRE PAGE OF YOUR APPLICATION TO:**

LEGAL SPECIALIZATION SECTIONS COORDINATOR

LSI CORPORATE OFFICE

P.O. BOX 660

FORTUNA, CA 95540-0660

FACSIMILE: 707.725.1344

E-MAIL: [lsiorg@suddenlinkmail.com](mailto:lsiorg@suddenlinkmail.com)

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

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

## SLSA and LSI MEMBERSHIP APPLICATION (continued)

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

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

**YOUR SPECIALTY:**

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

**EDUCATION:**

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

**TYPE OF OFFICE:**

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

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

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

**CHECK HERE IF YOUR EMPLOYER PAYS FOR YOUR MEMBERSHIP DUES**

**CHECK HERE IF YOUR EMPLOYER PAYS FOR MONTHLY DINNER MEETINGS**

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

**WHERE WOULD YOU LIKE YOUR E-MAIL DELIVERED?**

[ ] BUSINESS      [ ] RESIDENCE

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

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

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

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

# Benefit Highlights

by Jennifer Chastain

## Working Advantage Spotlight

Spring break is right around the corner. Check out these great deals for fitness, travel and other savings! Send an email to [chastain.j@gmail.com](mailto:chastain.j@gmail.com) to get LSI's member number to take advantage of these discounts. This is just a sampling of what is offered!

[24 Hour Fitness](#) 15% off myStore, Membership deals, \$10 off bodybugg calorie system, 10% off \$50+

[Nike Store](#) Free shipping on orders \$175+

[Sports Authority](#) 10% off your order

[DISNEYLAND® Resort: 1-Day PARK HOPPER® \(Anaheim, CA\) 2012 Ticket](#) Save up to \$5.00 per ticket

[Enterprise Rent-A-Car](#) \$9.99 weekend specials

[FTD.com](#) Save 20% on your order

[Restaurant.com](#) Additional 80% off - \$25 certificates as low as \$2!

[Disney Store](#) Up to 75% off



# CCLS Quiz

by Jennifer Estabrook, CCLS

1. Anyone filing an application for approval to adopt must be fingerprinted and submit to a background check.  
 True     False
2. The adoption procedure may be filed in juvenile court when a child is a ward of the court and has been referred to an adoption agency for placement.  
 True     False
3. Denial of Paternity is a type of involuntary proceeding freeing a minor for adoption.  
 True     False
4. The court can rule that a birth parent's consent to the adoption of a child is not required if the birth parent has willfully not communicated with or supported the child for a period of 6 months.  
 True     False
5. In adoption matters the terms "consent" and "relinquishment" can be used interchangeably.  
 True     False
6. One of the purposes of the Interstate Compact on the Placement of Children is to oversee placement of children for adoption to that black market adoptions can be eliminated.  
 True     False
7. After adoption the supplanted parents are relieved of all parental duties and responsibilities for the adopted child and have no legal rights over him/her.  
 True     False
8. In general, prospective adoptive parents are required to be at least 15 years older than the child to be adopted.  
 True     False
9. A married person may not lawfully adopt a child without the consent of their spouse if they are not legally separated and/or the spouse is capable of giving consent.  
 True     False
10. Consent of a birth parent to a stepparent adoption may be withdrawn without court approval.  
 True     False

See Answers, Page 27

# Law Office Products/Management

by Corene Rodder

## **Staff Meeting Success: Must Do & Definitely Don't!**

*The Sacramento Legal Secretaries Association does not promote specific vendors. The following is for informational purposes only.*

### **#1 "Must Do!"**

***Hold regular, pre-planned, and productive staff meetings.***

### **#2 "Definitely Don't!"**

***Hold a meeting without adequate preparation and the right facilitator to ensure employee meetings are productive, positive and efficient.***

Nancy Byerly Jones of NJB Consulting and Conflict Resolution, states the most critical points of her message are listed above. For a more comprehensive article, please review her 2002 Lawyers Weekly USA column entitled, "*Staff Meetings: Can't Live With (or without) Them?*" (October 18, 2002).

Below is a partial non-prioritized listing of "other" ingredients for successful staff meetings:

1. Know what the objectives are for holding any meeting as well as what amount of time should be allotted to each matter (e.g. educational, updates regarding firm news, 10-15 minute workshops conducted by different staff members each time, brainstorming of solutions needed for specific issues, Q & A time, etc.).
2. Share an informal agenda with all participants a few days ahead of the meeting, ask them for suggestions about the agenda and remind everyone to come appropriately prepared.
3. Decide on what the parameters and "rules" will be for all (e.g. cell phone to be banned from meetings? Any accountability for tardiness or no-show? Plan for ensuring all get fair time for asking questions, responding, etc.)
4. Plan ahead for how the meeting will be kept moving in a timely manner, how to nip any verbal or body language negativity at its onset, how to set a positive tone at the start, during the meeting and at its closure.
5. Include time at each meeting for publicly thanking any deserving employees for things (big or small) they have done well and/or above and beyond the call of duty.
6. Mid-way, take time to review the written agenda to ensure all matters being covered in a fair and timely manner.

7. Before closing, have everyone write down what, if any, decisions were made, who is to do what by when and what agenda items need to be carried over until the next meeting or what new ones need to be added.
8. Thank everyone for their participation and ask them to give you some quick feedback about what parts of the meeting worked very well and what aspects may need some improvement. Also encourage them to send you their written, confidential feedback via a memo if they prefer.
9. Post-meeting - have a plan for monitoring who is to do what and ensure they are doing it. Again, if not, are there any consequences for ignoring what they were asked and they agreed to do?
10. Consider rotating meeting planners and facilitators instead of depending on the same person or persons to plan and conduct re-occurring staff meetings.

Any and all time spent on learning how to plan and facilitate more effective meetings yields great rewards. The firm, its leaders, staff, and clients will reap immediate and ongoing returns.

Information and quotes obtained from the public page regarding office-management at [www.lawbusinesstips.com](http://www.lawbusinesstips.com).



# Governor's Report

by Deseree Gamayo

On Friday, February 24, 2012, I attended the LSI Quarterly Conference in Concord hosted by Mt. Diablo, LPA, as Governor Pro Tem for SLSA. The theme for the conference was "Let The Games Begin." The first event I attended was the Welcome Reception on Friday evening. Mt. Diablo LPA did an amazing job of incorporating the theme in this event. The reception was well attended and SLSA's executive board was also in attendance.

On Saturday morning I attended the Board of Governors Meeting. Following introductions and roll call, it was moved to approve the minutes of the November 2011 Quarterly Conference Board of Governors Meeting. The motion carried. Another motion was made and carried that the action of the Treasurer in paying the routine bills of LSI during the third quarter of fiscal year 2011-2012 be ratified. Reports of appointed officers were given and the meeting then adjourned for afternoon classes and luncheons.

Next, I attended the Governor's Luncheon from 12:00 – 1:30 p.m. wherein introductions were made and LSI Executive Board resumé topics were discussed.

The following recommendations were voted on in the afternoon session of the Board of Governors.

#### **Executive Committee recommendations:**

- With the exception of the Treasurer's Report and the EC resumé, that all officer and chairmen reports not be printed as an expense to LSI. Said reports will be posted to LSI's website no later than seven (7) days prior to conference, as to be available to read and print in advance of conference. To be effective June 1, 2012.
- That Standing Rule 17.1.5 be amended to read as follows: personal automobile mileage roundtrip from residence to the conference or meeting site at the rate of 40 cents per mile traveled, not to exceed the actual roundtrip airfare to the same destination.

#### **CCLS Certifying Board recommendations:**

- That Standing Rules 12.10 and 12.11 be consolidated into Standing Rule 12.9.
  - That Standing Rule 12.9 be edited to read as follows: *The fees charged to applicants taking and re-taking the examination, the fee charge for CCLS recertification, and the fee charged for replacement of an original CCLS Certification may be adjusted upon recommendation by the CCLS Certifying Board and approval of the Board of Governors.*
  - That Standing Rule 12.10 be deleted.
  - That Standing Rule 12.11 be deleted.
- That fees charged to applicants taking and re-taking the examination, the fee charged for CCLS recertification and the fee charged for replacement of an original CCLS Certificate be adjusted as follows:

|                 | LSI Member | Non-Member |
|-----------------|------------|------------|
| Registration    | \$25       | \$75       |
| Exam Fee        | \$100      | \$100      |
| Total:          | \$125      | \$175      |
| Retake Fee      | \$60       | \$70       |
| Deferral Fee    | \$30       | \$30       |
| Late Fee        | \$30       | \$30       |
| Recertification | \$25       | \$25       |
| New Certificate | \$30       | \$30       |

#### **Marketing Committee recommendation:**

- That all marketing committee members be called to every conference and that they be reimbursed by the Marketing budget.

#### **The Continuing Education Council recommendations:**

- That price of the CCLS Study Kit be \$299.
- Sections to the Study Kit be priced as follows, for individual purchase:
  - California Legal Procedure: \$30
  - Terminology: \$50
  - Legal Computations: \$30
  - Skills: \$30
  - Ability to Communicate: \$199
  - Law Office Procedures: \$70
  - Reasoning/Ethics: \$70

#### **Ad Hoc Committee recommendations:**

- Change or modify LSI's name.
- Hire Jeremy Durant, MBA, Bop Design to perform the following duties, including, but not limited to:
  - Assist with the name change or modifications.
  - Revamp LSI's logo and brand development.
  - Redesign and develop LSI's website.
  - Redesign all marketing materials.
  - Design a four-page membership recruitment brochure, an email newsletter, and direct mail recruitment.
  - Develop marketing strategies for the local associations in accordance with the changes and modernization of LSI.
  - Assist with ongoing marketing strategies.
- Hire attorney Dale Stern of Stern, Van Vleck & McCarron, LLP, located in Sacramento to assist with the legalities involved in the name change or modification.

### 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, 2011, through March 31, 2012. 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.

| <u>Date of Event</u> | <u>Event</u>  |
|----------------------|---|
| _____                | I submitted an article to <i>The Legal Secretary</i> magazine. (50 points)  |
| _____                | I attended an LSI Quarterly or Annual Conference. (50 points)   |
| _____                | I attended an Officer/Chairman Workshop at the Annual Conference.<br>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.<br>How many? _____ . (25 points per question)                     |
| _____                | I recertified as a CCLS during the 2011-2012 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, 2012. (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 <i>Legal Professional's Handbook</i> (LPH) between April 1, 2011, and March 31, 2012. (200 points)            |
| _____                | I purchased the <i>Law Office Procedures Manual</i> (LOPM) between April 1, 2011, and March 31, 2012. (200 points)            |
| _____                | I purchased updates to the LPH between April 1, 2011, and March 31, 2012. (100 points)  |
| _____                | I purchased updates to the LOPM between April 1, 2011, and March 31, 2012. (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](mailto:governor@slsa.org), otherwise you can mail this form to:

Sacramento Legal Secretaries Association  
Attn: Governor  
PO Box 188635  
Sacramento, CA 95818-8635

## Legal Procedures (cont.)

*submitted by Melanie Herman*

successive weeks with at least five days between each publication date (unless a special statute or the court directs otherwise). (Code Civ. Proc., § 415.50(b); Gov. Code, § 6064.)

Mailing: In addition, the order will direct that if defendant's address is learned before expiration of the time for publication of the summons, copies of the summons, complaint and order for publication must be "mailed forthwith" to defendant. (Code Civ. Proc., § 415.50(b).)

Service Of Code of Civil Procedure section 425.11 Statement: In personal injury and wrongful death actions, a separate statement of damages must be served before a default may be entered. (Code Civ. Proc., § 425.11(c).) The statement must be served in the same manner as the summons and complaint. (Code Civ. Proc., § 425.11 (d)(1).) An order for service of summons by publication includes a this statement; which means that no separate order to publish the statement of damages is required. (California Practice Guide Civil Procedure Before Trial, § 4:271.5.)

When Is Service Complete: Service is complete at the end of the 28th day following the first day of publication (including therein the first day). Defendant then has 30 days within which to respond—i.e., a total of 58 days from the first date of publication. (Code Civ. Proc., § 415.50(c); Gov. Code, § 6064.) Remember to check your local rules for differing statutes for the notice period!

If Plaintiff discovers defendant's address during the publication time, plaintiff can use personal or substitute service, which will supersede the published summons, and speed up the effective date of service. (Code Civ. Proc., § 415.50(d).)



## Governor's Report (cont.)

*by Deseree Gamayo*

- Once the marketing expert and attorney have been retained, the Ad Hoc Committee recommends that the LSI Executive Committee, in conjunction with the LSI Marketing Committee, select a committee of four members to work directly with Mr. Durant and Mr. Stern to assist in all areas of this project.

The Ad Hoc Committee's recommendation was amended by two members of the committee to cap costs at \$30,000. We were informed by the LSI President that this recommendation was an all or nothing recommendation and that the Governors would not be voting on each number in the recommendation individually.

All of the recommendations were approved by a majority vote or a 2/3 vote if required by the LSI Bylaws of the Governors. As a result of the Ad Hoc Committee's Recommendation being passed, Rod Cardinale, Jr. of Santa Clara County LPA withdrew his November 2011 motion to change LSI's name to California Legal Professionals, Incorporated. This means that there will be no vote at the May 2012 Annual Conference on that motion as it was passed in the Ad hoc Committee's recommendations.

I also attended the reception and banquet on Saturday night and Sunday brunch meeting where it was announced that Sacramento LSA won the bid to host the August 2014 Conference at the Embassy Suites in Downtown Sacramento.

This was an awesome personal experience and I encourage all SLSA members to attend a conference!



# Announcing

## The 2012 Edition of Introduction to California Civil Litigation (Emphasizing Superior Court Cases)

by Brenda Thomas Wilson, J.D.

Used as both a textbook and a reference book for over a decade, this 404-page edition focuses on the procedural aspects of civil litigation before trial in California superior court cases. Various forms, documents, and rules are explained, with many examples based on the Sacramento Superior Court local rules to show how the general aspects of litigation are specifically implemented through the application of both state and local rules. In a practical "nuts and bolts" approach, key information is provided on major topics, and tips that can only be learned through experience are shared. Contents in the latest edition, updated with rules and statutes effective January 1, 2012, include:

- Requirements for filing and methods of serving documents
- Civil case management rules, including Sacramento Superior Court's requirements
- Definitions of foreign words and phrases, general legal terms, symbols, jargon, and acronyms
- Basic elements of letters, use of boilerplate forms, and requirements for formatting pleading paper
- Discovery documents and procedures with California Electronic Discovery Act provisions
- Motions, including formatting, filing, service, tentative rulings, and court orders, with specific information for motions filed in Sacramento Superior Court
- Basic calendaring demystified with step-by-step illustrations, sample entries, and timeline summaries

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## Sacramento Legal Secretaries Association

Dinner Meeting • March 15, 2012



### Skip Tracing 101

Presented By:  
Bob Schabert  
of California Civil Process

Vendor of the Month:  
Sarnoff Court Reporters, A Veritext Company



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 March 12.** Checks should be made payable to SLSA, and mailed to: Maimie Chyinski, Registration/Reception Chair 2011-2012, SLSA, c/o Fagen Friedman & Fulfrust, LLP, 520 Capitol Mall, Ste. 400, Sacramento, CA 95814; or fax: 916-443-0030; or email to: [reservations@slsa.org](mailto:reservations@slsa.org). You may also register online at [www.slsa.org](http://www.slsa.org). Please add \$3 for reservations made after March 12. 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: \_\_\_\_\_ FAX: \_\_\_\_\_

*Do you require an  MCLE or  CCLS certificate?*

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:

Dijon Breaded Chicken, roasted red pepper mashed potatoes, seasonal vegetables.

Mushroom Ravioli – stuffed with mushrooms and cheese with a Marsala wine cream sauce.

All meals are served with a house salad and chocolate molten lava cake for dessert.

PLACER COUNTY LEGAL PROFESSIONALS' ASSOCIATION  
PRESENT

# SPRING LUNCHEON AND BUNCO

SATURDAY, MARCH 17, 2012    12:00 – 4:00 P.M.

SALAD AND POTATO BAR

DEWITT SENIOR CENTER  
11576 D AVENUE  
AUBURN, CA

**\$20 PER PERSON ADVANCE PURCHASE or RESERVATION  
\$25.00 AT DOOR**

The Placer County Legal Professionals Association will be hosting a Spring Luncheon and Bunco Party on St. Patrick's Day, Saturday, March 17, 2012. This event is a luncheon followed by an afternoon of the table game, Bunco. Door prizes donated from local business and members of our organization are given away during the afternoon.

This semi-annual event has a two-fold purpose. Nearly two thirds of the proceeds are given directly back to the community to local organizations such as the Senior Center, Children's Receiving Home, Habitat for Humanity of Placer County, Women's Shelter, Boys and Girls Clubs, Ride to Walk as well as other organizations that seek our help. The other third is to cover our costs and goes into our education fund.

**We would greatly appreciate the donation of a raffle prize gift for our fund raising table.**

If you need any additional information, my daytime telephone number is (916) 788-1960. My evening residence telephone number is (916) 797-9788.

Thank you for your consideration.

Very truly yours,

Mary Ayala,  
Bunco Chair, PCLPA  
Federal Tax ID - 68-0348690 / Tax Status - 501 "C"



## SLSA President Nomination

### Dawn Forgeur, CCLS



I am a litigation secretary for Stoel Rives LLP, and have been in the legal field for over twelve years, previously working at Greenburg Traurig, LLP, and Best Best & Krieger LLP. I have also been SLSA's Governor from 2010-2011. I have served on the Budget Committee and as a Legal Secretarial Training Chair. In 2009-2010, I was appointed as LSI's Legal Secretarial Training/Seminar Chair. It has been a pleasure to have served as your President this past year. I have been able to learn many things about SLSA this past year, such as: learning all of the chairmen positions, what it takes to coordinate with the editor of *The Legal Eagle* to pull together a great publication, the history of SLSA, how to run the meetings and speak in front of members, but most significantly, I have learned how important volunteers are to running this association. Without volunteers, this organization would not be as successful as it is now. I look forward to working with the incoming Executive Board, the volunteers that will be working with us, and the SLSA members in the upcoming year.

## SLSA Vice President Nomination

### Lynne Gomes



I am a legislative/legal secretary at Greenberg Traurig, LLP with almost 30 years' experience in the legal field. I have been a member of SLSA for over seven years, and was a member of Solano County LSA for many years prior to relocating to Sacramento. For the past year, I have served as SLSA's Vice President, and have also held many chair positions within SLSA. Prior to joining SLSA, I served as a two-term President for Solano County LSA, also holding the offices of Secretary, Vice President, and Governor. From 1996-1997, I served as LSI's Law Office Administration Section Leader.

It has been my pleasure to serve as SLSA's Vice-President this past year, and I would be honored to continue to work alongside our members in this role. I believe I have a strong commitment to SLSA, LSI, and the legal profession as a whole, and would like to continue the work I have been doing in the areas of marketing and membership, in addition to supporting the members of SLSA and the Executive Board. Thank you for your support and for allowing me to serve you.

## SLSA Secretary Nomination

### Maimie Chyinski

---

I am honored to be nominated for the position of Secretary. I am currently a legal receptionist at Fagen Friedman & Fulfrost, LLP. I have represented SLSA as Treasurer and I have held the positions of Reservations and Reception Chair, Boss of the Year and Legal Professional of the Year Chair, and Budget Committee Member. I believe that my experience as a receptionist for a law firm and participation in SLSA has given me the qualities to be your Secretary. This nomination gives me an opportunity to be part of a great organization that continues to provide educational opportunities and support for those in the legal profession.



## SLSA Treasurer Nomination

### Deseree Gamayo

---

It is a great honor and privilege to be nominated for the position of Treasurer for this organization. I have been an SLSA member since 2010 and was on the executive board 2011-2012 as Secretary. Over the last ten years I have worked as both an office administrator and legal secretary at a transactional law firm and a litigation firm. My experiences from working in these small firms provided me with a unique insight into the challenges of administrative and secretarial work as well as the actual business of running a legal practice. I believe that my background will complement the existing wealth of knowledge that my fellow SLSA members already possess. In addition to my work as a legal secretary, I am raising two young boys and am involved in community and sports organizations. I look forward to becoming an active voice in the leadership of SLSA as I continue to grow and develop my legal career. This nomination presents a unique opportunity that will not be taken for granted.



## SLSA Governor Nomination

### Melanie Herman



I received my B.S. from Sonoma State University where I majored in Criminology. I received my paralegal certificate from Cal State East Bay while working as a case clerk. I am currently the sole paralegal/legal secretary at Perkins & Associates. I have been with Perkins & Associates since its foundation in 2009, and have been a driving force behind its growth and achievements. I love being involved in the legal community, and could never see myself working in any other field.

I joined SLSA in 2011. Although I was a newer member, I was lucky enough to be given the opportunity to serve as your Treasurer for the latter part of 2011-2012. As your Treasurer, I have strived to do all I can to further the goals and interests of our organization. I am truly honored that I have gained the trust of our Association and have been nominated for the position of Governor. As your Governor, I will eagerly attend all LSI conferences and Board of Governors meetings. I will be sure to advocate for SLSA and do all that I can to ensure that our voice is heard.

## SLSA Delegate Nomination(s)

### Launa Atkinson, CCLS



I am honored to have been nominated for the position of Delegate. I am a legal secretary at Caulfield Davies & Donahue in Folsom since May 2007, specializing in civil litigation/insurance defense. I am also a Notary Public. I have been in the legal field since 1984 and a member of SLSA since 2009. Last year, I served as Interclub chair and helped coordinate the Legal Trivia Throwdown, which was a truly fun event. I have attended two LSI Conferences and attended the board of governors meeting in May 2011, which I found to be very interesting. I want to learn more, and take a more active role within the association. With your vote, I am ready to and would enjoy representing Sacramento Legal Secretaries Association at the annual conference in May in San Diego.

## SLSA Delegate Nomination(s) (cont.)

### Elizabeth Bomke, CCLS

---

I joined SLSA in 2005 and have been a delegate at least three times for SLSA. Thank you for your confidence in my ability to represent you at those annual Conferences. I understand what the position entails and would like your vote to represent you at the next annual Conference.



### Sherri Lee Caplette, CCLS

---

My name is Sherri Lee Caplette, CCLS, and I ask for your vote as one of the delegates to the LSI Annual Conference. I am the office manager/legal secretary for Fagen Friedman & Fulfrust, LLP in Downtown Sacramento. I have been in the legal field for 30 years, 20 years in Sacramento and 10 in the San Fernando Valley. I have served SLSA in various capacities over the years, including President, Executive Advisor, Parliamentarian, and nearly all of the chair positions. I have also served LSI at the state level as the Scholarship Chair and as the magazine editor of *The Legal Secretary*, and I have taught various classes and seminars over the years. I know there are upcoming decisions and votes to be made at the conference. I believe that my experience and my understanding of SLSA's needs, not to mention the rules and bylaws of LSI and SLSA, will allow me to be an effective delegate and voter. I ask for your vote to be a delegate for SLSA at the LSI Annual Conference in San Diego.



## SLSA Delegate Nomination(s) (cont.)

### Anne French

---



My name is Anne French and I have been nominated for the position of Delegate. I have been a member of the Sacramento Legal Secretaries Association since 2005. I was on SLSA's Board as Vice President from 2010-2011. I represented SLSA as a Delegate at last year's annual conference in Los Angeles. I am currently the scholarship chair for SLSA and I feel that my experience and knowledge as a representative of SLSA will serve the association well at this year's annual conference. I hope that you will vote for me to once again represent SLSA as a Delegate for this year's annual conference.

### Debbie Frias, CCLS

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I am running for one of SLSA's delegates for LSI's 2012 annual conference in San Diego. I have been a member of SLSA for about 19 years. I joined for educational opportunities, but soon found myself involved as a volunteer as the first Advertising Chairman and joined other members of our group to put a conference together -- one held in August 1995 at the Radisson Hotel. I was also appointed Secretary late in 1994 and served in that capacity for several terms. I also served as SLSA'S President from 1998 to 2000 and Governor from 2000 to 2002 and later, in about 2008 or so. I've served in other capacities and chairmanships as well, and also helped LSI as conference chair for August 2003 in Reno, Nevada, and as LSI Treasurer from 2004-2005. Most recently, I was on the California Certified Legal Secretary board.

As a conference delegate, your tasks are to attend all functions (reception, general meeting, banquet, and brunch), and vote on certain items presented during the general business meeting. Many times, these include election of a treasurer and/or other LSI candidates; other items might come up that require the delegates' consideration and vote, and these are usually voted on pursuant to the instruction of our local associations. Sometimes, however, there is no instruction. As a past president and governor, I believe I have the qualities needed to make an informed decision and vote accordingly.

## SLSA Delegate Nomination(s) (cont.)

### Paula Lockard, CCLS

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With many, many years in the legal profession, you'd think I should be grazing in the pasture, but no there's too much to learn and do! That's not the case at all. I work for the City Attorney's Office for the City of Sacramento. Prior to that, I worked for McDonough Holland & Allen. I've seen firms fold, expand, people come and go, but LSI and SLSA make it possible to keep us up to date with its excellent educational opportunities. I look forward to attending and reporting back to you on what LSI and other local chapters have been and will be doing in the future.



### Jennifer Rotz

---

Greetings, Members! It is great to be communicating with you again and it is an honor to have been nominated as a delegate for LSI's Annual Conference. I am a litigation paralegal with the Healthcare Practice Team at Murphy Austin Adams Schoenfeld LLP. There, I interact with healthcare providers to compile financial data and medical records for use at arbitration and trial and assist the healthcare team in representing healthcare providers in payment disputes with managed care payers, and with various state and federal administrative and regulatory matters. I am a Past President of SLSA and have also served the association in the following capacities: Secretary, Bulletin Editor, 2005-2006; Governor, Bulletin Editor, 2006-2007; Secretary, Bulletin Editor, 2007-2008; Vice President, Website Coordinator, 2008-2009; President, Budget Committee, Website Coordinator, 2009-2010; and Executive Advisor, 2010-2011.

Due to my previous experience with SLSA, I am familiar with the tasks assigned to Delegates. I am confident in my ability to carry out the Delegate tasks and can assure you that, if elected, I will represent SLSA well, attend required meetings, and vote as instructed by you, the members of SLSA.





## SANTA CLARA COUNTY LEGAL PROFESSIONALS ASSOCIATION

A Member of Legal Secretaries, Incorporated® – Educating California's Legal Professionals

### PRESENTS

## ETHICS UPDATES FOR LEGAL PROFESSIONALS

This 90-minute program will focus on the ethics rules that are most pertinent for legal professionals. We will discuss new developments to California's Rules of Professional Conduct, as well as old concepts that remain particularly important. Examples include changes to the rules regarding contact with represented parties, rules relating to the preparation of fee agreements, issues surrounding advertising and social media, and emerging issues relating to use of technology and its impact on client confidentiality.

SCCoLPA, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing education credit by the State Bar of California in the amount of 1.5 hours, of which zero time will apply to law practice management/prevention, detection, and treatment of substance abuse and emotional distress/elimination of bias credit (as appropriate to the content of the activity).

**Thursday, March 22, 2012**

**Presenter: Alison Buchanan, Esq.  
Hoge, Fenton, Jones & Appel**

|   |  |
|---|--|
| 5:15 p.m. – Registration<br>5:30 p.m. – Dinner Served<br>6:00 p.m. – 7:30 p.m. – Workshop | <b>The Bold Knight</b><br>840 N. First Street, San Jose<br>(408) 297-2170<br>Additional parking next door<br>@ Valley Credit Union |
|---|--|

\$50 (non-members – includes dinner and free one-year membership in SCCoLPA /no refunds)  
\$35 (members – includes dinner/no refunds)

*Return this portion with your payment OR register online and pay through PayPal at [www.sccolpa.org](http://www.sccolpa.org)*

**REGISTRATION FORM – ETHICS UPDATE – Thursday, March 22, 2012**

|  |  |
|--|--|
| Name: _____<br>Mailing Address: _____<br><br>Email Address: _____<br>Home Phone: _____<br>Work Phone: _____<br>Employer: _____<br>Years of Legal Experience: _____<br>Special Dietary Request: _____ | Return this form and your check or money order<br>(made payable to "SCCoLPA") to:<br><br>Jill Gardella<br>SCCoLPA Education Workshop Chair<br>c/o Nolan, Armstrong & Barton, LLP<br>600 University Avenue<br>Palo Alto, CA 94301<br><br>If you have any questions regarding the above<br>workshop, please contact Jill Gardella at<br><a href="mailto:jgardella@nablaw.com">jgardella@nablaw.com</a> |
|--|--|

# CCLS Terminology List

by Jennifer Estabrook, CCLS

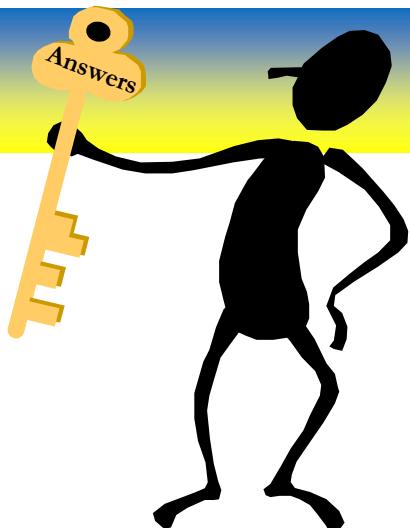
|                           |  |
|---------------------------|--|
| Adult adoption            | type of adoption which may be employed only when both the person adopting and the person being adopted have attained majority  |
| Agency adoption           | an adoption proceeding where the father and/or mother have relinquished the child to a licensed adoption agency for placement  |
| Alleged Natural parent    | Person who alleges that he/she is, or is alleged to be, the biological parent of child, but who does not qualify for any of the statutory presumptions of paternity  |
| Birth parent              | the biological (natural) parent  |
| Confidential intermediary | and individual appointed by the court as a “go-between,” whose actions are conducted in confidence on behalf of one or more siblings seeking to make contact with another sibling                                  |
| Dependent child           | a child who is a ward of the court and whose parents have had their parental rights terminated   |
| Independent adoption      | an adoption in which the child is placed by its parent(s), who consent to the child’s adoption by specific individuals   |
| Intercountry adoption     | adoption of a foreign child for whom federal law makes a special immigration visa available  |
| Presumed father           | a man is presumed to be a child’s natural father if he and the child’s mother are or have been married to each other and the child is born during the marriage or within 300 days after the marriage is terminated |
| Stepparent adoption       | an adoption in which a stepparent is the petitioner and one natural or adoptive parent retains custody and control of the child  |

# CCLS Quiz Answers

by Jennifer Estabrook, CCLS

## CCLS QUIZ ANSWERS (from page 12):

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





# 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](mailto:drforgeur@stoel.com).

**\$10 EACH**



# March 2012

| Sun | Mon   | Tue                                 | Wed | Thu   | Fri | Sat                                      |
|-----|---|-------------------------------------|-----|---|-----|--|
|     |   |                                     |     | 1   | 2   | 3  |
| 4   | 5   | 6<br><i>Executive Board Meeting</i> | 7   | 8   | 9   | 10                                       |
| 11  | 12  | 13                                  | 14  | 15<br><i>Regular Dinner Meeting Elections</i> | 16  | 17<br><i>CCLS Exam St. Patrick's Day</i> |
| 18  | 19<br><i>Last Day to Submit Articles for Bulletin</i> | 20                                  | 21  | 22  | 23  | 24                                       |
| 25  | 26  | 27                                  | 28  | 29  | 30  | 31                                       |

## Dates to Remember

- **March 6 - SLSA Executive Board Meeting**  
(Location: Stoel Rives - Time: 6:00 p.m.)
- **March 15 - Regular Dinner Meeting**  
(Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)
- **March 19 - Last Day to Submit Articles for the April issue of The Legal Eagle**
- **April 9 - SLSA Executive Board Meeting**  
(Location: Stoel Rives - Time: 6:00 p.m.)
- **April 19 - Regular Dinner Meeting & Installation** (Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)
- **April 23 - Last Day to Submit Articles for the May issue of The Legal Eagle**



# SLSA's Federal Day in Court Vendor Thank You

by Crystal Rivera



**MANY THANKS!** Our February 16, 2012, Federal Day-In-Court event at the Hilton Arden West was another success. Space was limited and we were only able to have 8 vendors participate in this event. As usual, our vendors didn't let us down; they provided plenty of information about their products and services, and generous raffle prizes.

## ACE Attorney Service, Inc.

- Scott Poe
- Jade Scarlett

## Atkinson-Baker, Inc.

Wendy Lannoye

## California Civil Process

- Robert Schabert
- Brandi Richardson

## Capitol Digital Document Solutions

- Dave Wilkinson
- Ron Bodenmann
- Ignacio Solorio

## Capitol Legal Investigations, Inc.

- Luke Patterson

## First Legal Network

- Jim Pinter

## Nationwide Legal, LLC

- Mike Taraban
- Alex Cain
- Tracy Scott

## Stella & Dot Jewelry

- Sarah Clark, Stylist

Thank you for your participation in our February DIC event and for your continued support of SLSA.

## Chapter Achievement Points

Are you a CCLS that has recertified during the 2010-2011 fiscal year? SLSA earns 50 points for each member that has recertified.

Did you know that members who belong to an LSI sponsored credit union can earn SLSA 100 Chapter Achievement Points?

Did you know that members who use the LSI Hertz discount can earn SLSA 200 Chapter Achievement Points each time they rent a car?

Please email [governor@slsa.org](mailto:governor@slsa.org) and let us know how you've helped SLSA earn CAPs.





Imperial County Legal Professionals Association  
and  
San Diego Legal Secretaries Association

celebrate the 50s with

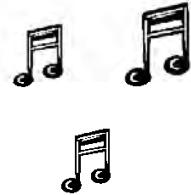


## HAPPY DAYS

Legal Secretaries, Incorporated's 78th Annual Conference



Bahia Resort Hotel  
998 W. Mission Bay Drive, San Diego, CA 92109



May 17-20, 2012

### CONFERENCE REGISTRATION FORM

NAME (AS IT WILL APPEAR ON BADGE): \_\_\_\_\_  
 MAILING ADDRESS: \_\_\_\_\_  
 CITY/STATE/ZIP: \_\_\_\_\_  
 TELEPHONE: \_\_\_\_\_  
 EMAIL ADDRESS: \_\_\_\_\_  
 LOCAL ASSOCIATION (DO NOT ABBREVIATE): \_\_\_\_\_

PLEASE CHECK IF APPLICABLE (INCLUDE TITLE):

STATE OFFICER: \_\_\_\_\_

STATE CHAIRMAN: \_\_\_\_\_

GOVERNOR     CCLS     PLS     DELEGATE     ALTERNATE DELEGATE

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

|  | BY CHECK | BY PAYPAL |         |
|--|----------|-----------|---------|
| POSTMARKED ON OR BEFORE APRIL 15, 2012 | \$127.00 | \$130.99  | \$_____ |
| POSTMARKED ON OR AFTER APRIL 16, 2012  | \$137.00 | \$141.28  | \$_____ |

INDIVIDUAL TICKETS:

|  |        |         |         |         |
|--|--------|---------|---------|---------|
| REGISTRATION ON OR BEFORE APRIL 15, 2012   | ____ @ | \$20.00 | \$20.88 | \$_____ |
| REGISTRATION ON OR AFTER APRIL 16, 2012  | ____ @ | \$30.00 | \$31.17 | \$_____ |
| GOVERNORS' LUNCHEON (FRIDAY)   | ____ @ | \$25.00 | \$26.03 | \$_____ |
| PRESIDENTS' LUNCHEON (FRIDAY)  | ____ @ | \$25.00 | \$26.03 | \$_____ |
| NEWCOMERS' LUNCHEON (FRIDAY)   | ____ @ | \$25.00 | \$26.03 | \$_____ |
| WELCOME RECEPTION (FRIDAY)   | ____ @ | \$25.00 | \$26.03 | \$_____ |
| CCLS LUNCHEON (SATURDAY)   | ____ @ | \$27.00 | \$28.09 | \$_____ |
| BANQUET (SATURDAY)   | ____ @ | \$60.00 | \$62.04 | \$_____ |
| <input type="checkbox"/> PRIME RIB <input type="checkbox"/> SALMON <input type="checkbox"/> VEGETARIAN |        |         |         |         |
| BRUNCH (SUNDAY)  | ____ @ | \$28.00 | \$29.12 | \$_____ |

TOTAL AMOUNT PAID: \$\_\_\_\_\_

SPECIAL DIETARY REQUEST (INCLUDING VEGETARIAN): \_\_\_\_\_

MAKE CHECKS PAYABLE TO: **2012 ANNUAL CONFERENCE FUND**  
 SEND TO: **ESPERANZA LARIOS, P.O. BOX 3805, EL CENTRO, CA 92244**

TO PAY BY PAYPAL: [WWW.SDLSA.ORG](http://WWW.SDLSA.ORG) (PAYMENT INCLUDES TRANSACTION FEE)



Imperial County Legal Professionals Association  
and  
San Diego Legal Secretaries Association

celebrate the 50s with



## HAPPY DAYS

Legal Secretaries, Incorporated's 78th Annual Conference



Bahia Resort Hotel  
998 W. Mission Bay Drive, San Diego, CA 92109



May 17-20, 2012

### HOTEL REGISTRATION FORM

Name: \_\_\_\_\_  
Mailing address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Email Address: \_\_\_\_\_

Arrival Date: \_\_\_\_\_ Departure Date: \_\_\_\_\_  
Roommate(s): \_\_\_\_\_

#### Accommodations:

- Single/Double
- Triple
- Quad
- Add'l Person

\$139.00 per night  
\$159.00 per night  
\$179.00 per night  
\$20.00 per night  
Children 17 and under may stay in  
parents' room at no additional charge



Reservations: [https://shop.evanshotels.com/bahia\\_groups/lsi0516b12.html](https://shop.evanshotels.com/bahia_groups/lsi0516b12.html) or  
call the hotel at 858-488-0551

**DEADLINE TO RESERVE YOUR ROOM IS APRIL 16, 2012 – BOOK EARLY!**

**Check In:** 4:00 p.m.      **Check Out:** 12:00 p.m.

**Parking:** Complimentary

**Airport:** San Diego International Airport is 7 miles from the hotel.

**Transportation:** Cloud 9 Shuttle (\$12 each way); taxi (\$22-\$27 each way)

**For additional information, contact:**

Liz Adame, CCLS, Conference Co-Chair

(760) 460-1916

[liz.adame@sbcglobal.net](mailto:liz.adame@sbcglobal.net)

Michelle D. Tice, CCLS, Conference Co-Chair

(619) 820-9525

[michelle@danstanfordlaw.com](mailto:michelle@danstanfordlaw.com) and [mdtice@cox.net](mailto:mdtice@cox.net)

(please send emails to both addresses)

# 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"/> Saturday, March 17, 2012   |
| <input type="checkbox"/> Southern California | <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 \_\_\_\_\_

**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 \_\_\_\_\_

**PER LSI STANDING RULES, CHECKS ISSUED TO LSI WHICH ARE NON-NEGOTIABLE BECAUSE OF INSUFFICIENT FUNDS OR OTHER REASON SHALL BE REPLACED IMMEDIATELY BY CASH, A CERTIFIED CHECK OR MONEY ORDER FOR THE AMOUNT OF THE ORIGINAL CHECK, PLUS \$25 PENALTY, PLUS THE ACTUAL COST CHARGED LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL CHECK.**

| NEW | RENEWAL |
|-----|---------|
|     |         |
|     |         |
|     |         |
|     |         |
|     |         |
|     |         |

- 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: \_\_\_\_\_

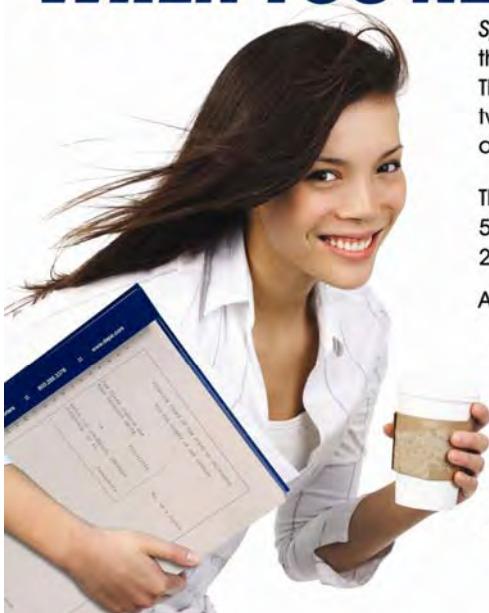
SPECIALTY: \_\_\_\_\_

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



|                       |          |
|-----------------------|----------|
| Elizabeth Bomke, CCLS | March 4  |
| Jinni Stallberg       | March 9  |
| Whitney Squire        | March 18 |
| Connie Kelley         | March 21 |
| Jim Pinter            | March 21 |
| Jaymee Thorne         | March 21 |
| Michelle Chavez, CCLS | March 24 |

## WHEN YOU NEED IT **FAST!**



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## 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)<br>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 $\frac{1}{2}$ " 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 $\frac{1}{2}$ " 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.

(Prices effective 07/01/2011)

## 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<br>-or-<br><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        |   |           |
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| Total Members<br>(Fiscal Year-end<br>4/30/11) | Association                | LSA | New<br>Members | Transfer<br>Members | Continuing<br>Members | Total Members |
|---|----------------------------|-----|----------------|---------------------|-----------------------|---------------|
| 42  | Alameda County             | LSA | 3              |                     | 34                    | 37            |
| 0   | Antelope Valley            | LSA | 2              |                     | 8                     | 10            |
| 50  | Beverly Hills/Century City | LSA | 3              |                     | 39                    | 42            |
| 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 | 4              |                     | 35                    | 39            |
| 37  | Imperial County            | LPA | 14             |                     | 26                    | 40            |
| 27  | Livermore-Amador Valley    | LPA | 4              |                     | 21                    | 25            |
| 64  | Long Beach                 | LSA | 18             |                     | 52                    | 70            |
| 46  | Los Angeles                | LSA | 7              |                     | 36                    | 43            |
| 17  | Marin County               | LPA | 1              |                     | 12                    | 13            |
| 38  | Merced County              | LPA | 7              | 1                   | 33                    | 41            |
| 14  | Monterey County            | LSA |                |                     |                       | 0             |
| 62  | Mt. Diablo                 | LPA | 19             |                     | 54                    | 73            |
| 15  | Napa County                | LSA |                |                     | 13                    | 13            |
| 78  | Orange County              | LSA | 43             |                     | 50                    | 93            |
| 25  | Palo Alto                  | LSA |                |                     |                       | 0             |
| 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 | 54             |                     | 109                   | 163           |
| 239   | San Diego                  | LSA | 59             |                     | 146                   | 205           |
| 34  | San Fernando Valley        | LSA | 22             |                     | 20                    | 42            |
| 43  | San Francisco              | LPA | 23             |                     | 24                    | 47            |
| 31  | San Gabriel Valley         | LSA | 8              |                     | 19                    | 27            |
| 77  | San Mateo County           | LSA | 7              |                     | 60                    | 67            |
| 26  | Santa Barbara              | LSA | 4              |                     | 22                    | 26            |
| 59  | Santa Clara County         | LSA | 33             |                     | 46                    | 79            |
| 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 | 2              |                     | 36                    | 38            |
| 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            |
| <b>1688</b>                                   | <b>YTD TOTALS</b>          |     |                |                     |                       | <b>1603</b>   |



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Lynne Gomes

SLSA Vice President and Membership Chair 2011-2012

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Sacramento, CA 95814

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

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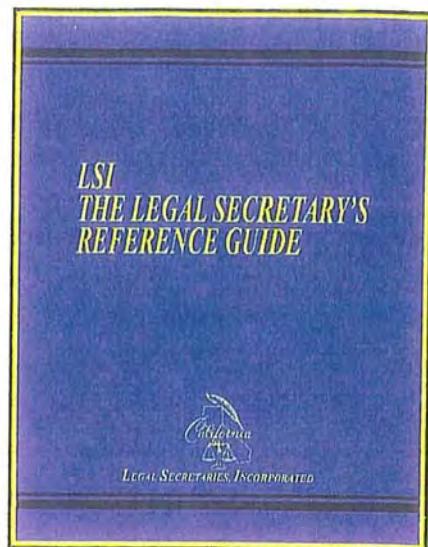
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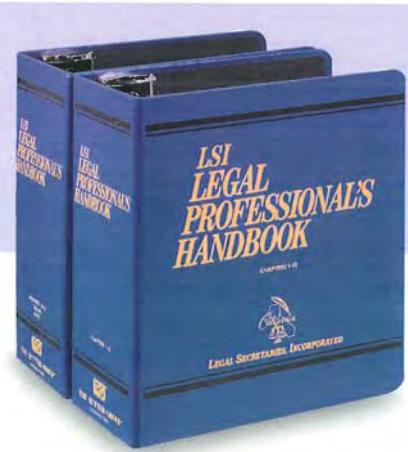
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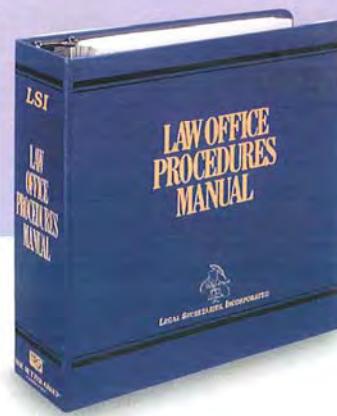
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## Editor's Note

by Liz Gideon

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