



Sacramento Legal Secretaries Association

The Legal Eagle

Book 2014, Issue 3

March 2014

U.S. District Court, Eastern District, Makes Federal Day In Court a Success



The Honorable Allison Claire, U.S. District Court Magistrate Judge, and Lynne Koroush, CCLS (see story on page 12)

Next Dinner Meeting: Family Law - March 20, 2014

SLSA will hold its next monthly dinner meeting on Thursday, March 20, 2014, at the Courtyard Marriott, 4422 Y Street, Sacramento. Hal Bartholomew, Esq., will be our guest speaker. Mingle from 5:45 to 6:15 p.m., with dinner served at 6:15 p.m.

In this issue

SPRING CHARITABLE PROJECT

2014/2015 NOMINEES FOR OFFICERS AND DELEGATES

LSI EDUCATION DAY



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NON-MEMBERS ARE WELCOME!

We're on the Web!
www.slsa.org

President's Message: "Spring Potpourri"



Lynne Koroush, CCLS
President

It's almost Spring! Even though our weather here in Sacramento has felt more like Spring than Winter the last few months, it's exciting to see the flowers and trees blooming, see the sun shining a little longer, etc.

We still have to conserve our water usage and get

creative with how we're going to make the most of what we have with less resources, but it's doable and we will get through it.

SLSA will also be doing its best to continue providing quality educational programs and training opportunities to the legal community, while creatively and wisely utilizing its available resources. If you are interested in helping out and offering your ideas, talents, and skills, please let me know. We would be thrilled to welcome you to the team!

The Nominations and Elections Committee has presented the following slate of candidates for SLSA's officer positions for the 2014-2015 term:

President – Lynne Koroush, CCLS

Vice President – Crystal Rivera

Secretary – Jennifer Estabrook, CCLS

Treasurer – Elizabeth Madden, CCLS

Governor – Open

The nominees for delegates to LSI's Annual Conference in May 2014 are:

Corene Rodder

Anne French

Heather Rodriguez, CCLS

Cyrene Farrell, CCLS

Nominations for officers and delegates were officially closed at the February 20, 2014, membership meeting, and ballots have been mailed to all members. Please be sure to follow the directions for properly submitting your completed ballot so that your votes are counted.

Governor Dawn Forgeur, CCLS, will be reporting all the news from LSI's Third Quarterly Conference held in Modesto; however, I am very excited and pleased to share with you that my nomination for the office of LSI Treasurer has been accepted and included on the slate of candidates that will go before the delegates at LSI's Annual Conference in May. I appreciate your support and encouragement, and I am extremely honored to be representing Sacramento Legal Secretaries Association as a candidate for office at the LSI level.

I would like to thank our Day in Court Committee -- Chair Deseree Gamayo, and Co-Chairs Crystal Rivera and Kim Smith – for an outstanding job in presenting our two Day in Court meetings. The January State Day in Court event drew over 200 attendees and 14 exhibitors, and the February Federal Day in Court event drew over 100 attendees and 10 exhibitors! Special thanks, also, to our Registration/Reservations Chair, Paula Lockard, CCLS, who did an amazing job keeping all the RSVPs and registrations in order. This team's commitment to excellence produced two outstanding programs, enjoyed and appreciated by all who attended.

Our March 20, 2014, meeting will feature Hal Bartholomew, Esq., who will be discussing family law. Mr. Bartholomew is regarded as one of the best family law attorneys in our area, and a popular speaker, so be sure to register your

attendance for this meeting. A flyer is included in this bulletin with all the details. On March 27, 2014, our Lunch Lessons return with a presentation on E-filing by the Third District Court of Appeal. See the flyer in this bulletin for more information.

In April, our guest speaker will be Michael Bromberg of Leadership Comedy, who will be addressing workplace stress reduction. April will also be our annual installation of officers, and we will be joined by Mary J. Beaudrow, CCLS, the incoming President of LSI. I hope you will plan to attend, as this promises to be a fun and informative event.

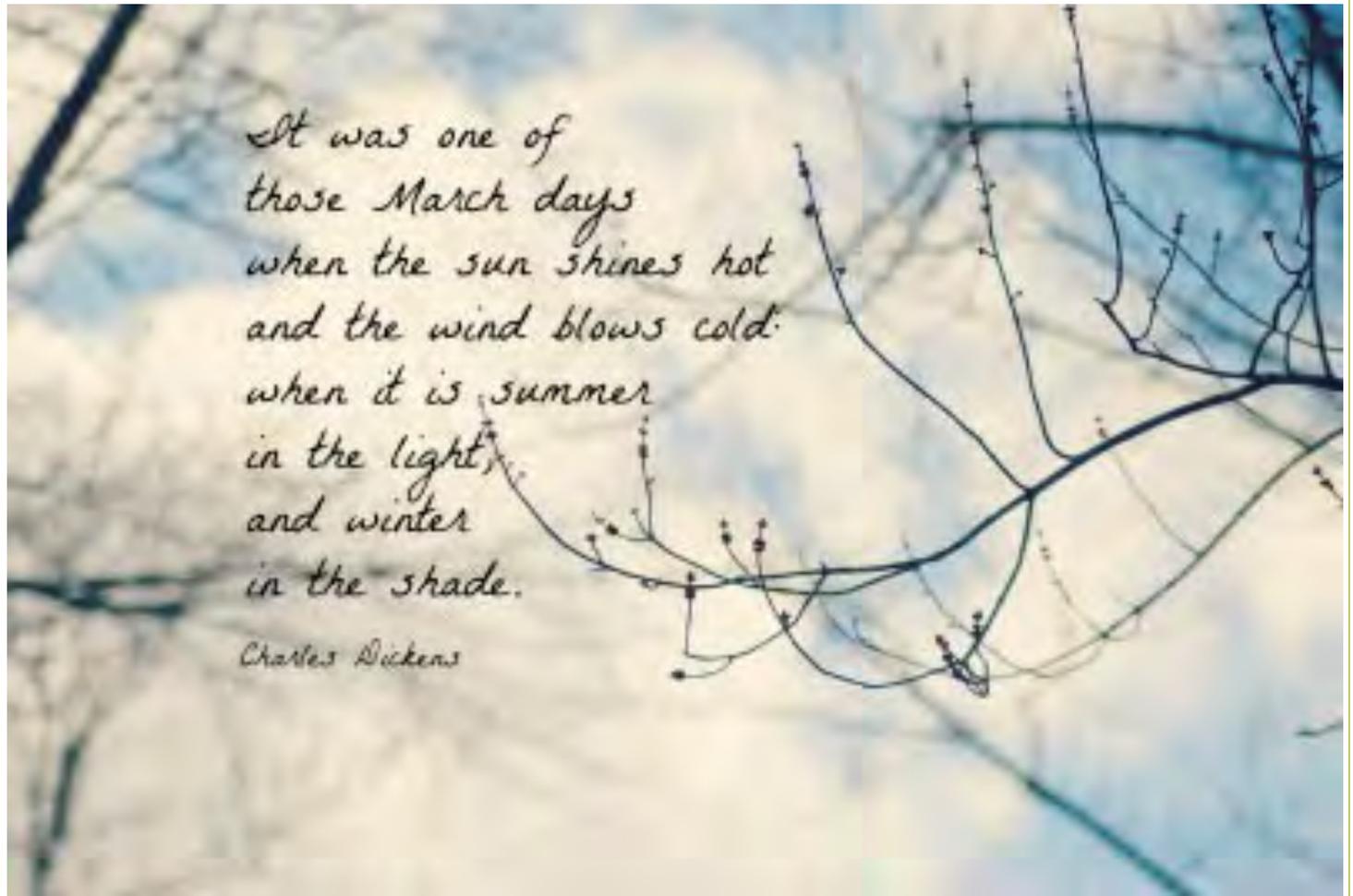
May 2014 will bring LSI's Annual Conference in Concord, and we will be participating on several different levels, including officer/chairmen workshops, Legal Specialization Section/educational workshops, bulletin contest, history book contest, membership gain contest, chapter

achievement contest, recognition of the new CCLSes, election/installation of officers, and, of course, LSI's business meeting. Concord is just a short drive from Sacramento, so I hope to see many of you there.

Please note that SLSA membership renewals will be due on May 1, 2014, and considered late after June 1, 2014. Membership renewal forms for the 2014-2015 term will be available in the April bulletin and posted on SLSA's website beginning April 1, 2014.

As you can see, it's a veritable potpourri of events for Spring! Take advantage of as many events and programs as you can!

--Lynne





Sacramento Legal Secretaries Association

Dinner Meeting • March 20, 2014



Hal Bartholomew, Esq. "Family Law"

Vendor of the Month:
Wall Street Reporting

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 / \$30 Non-Members

RSVP by Noon on Friday, March 14. Make checks payable to SLSA, and mail to:
Paula Lockard, CCLS, Registration/Reception Chair 2013-2014, c/o Sacramento City Attorney's Office,
915 "I" Street, 4th Floor, Sacramento, CA 95814. You may also register via e-mail at reservations@slsa.org, or
through our website at www.slsa.org under Upcoming Events.

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

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

NAME: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

EMAIL: _____

TEL: _____ FAX: _____

Do you require a 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:

Sautéed Tilapia Fillet – Sun-dried
tomatoes, artichokes, capers, olives,
Chardonnay Basil, over Basmati rice.

Peppercorn Chicken – Mushroom
peppercorn sauce with vegetables and rice
pilaf.

Vegetarian Option: Eggplant
Parmesan.

All meals will be served with salad and
dessert.

Nominations and Elections Committee Report: Nominations for 2014-2015



Summary of Qualifications for Office of SLSA President – Lynne Koroush, CCLS

I am currently working as a legal secretary with Carroll, Burdick & McDonough LLP, and have over 30 years' experience in the legal field. My areas of specialty are public sector labor law, litigation, legislative, regulatory, and administrative law. I have been a member of SLSA since 2004, and presently hold the office of President. I have also held the office of Vice President (2011-2013), and served on the committee level as Vendor Liaison, Day in Court Co-Chair, and Reno Bus Trip Chair. I am the current Professional Liaison/Day In Court Chair for LSI, and was the LSI Law Office Administration Section Leader from 1996-1997.

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. I recently earned the distinction of California Certified Legal Secretary by passing the CCLS exam in October 2013. It has been a tremendous honor and privilege to serve as your President this past term, and I look forward to working with you in the coming term.



Summary of Qualifications for Office of SLSA Vice President - Crystal Rivera

My name is Crystal Rivera and I am running for Vice President of SLSA. I joined SLSA in 2008, was Secretary of the year in 2010-2011, and have been on several committees. I have been a legal secretary for over 34 years, and have been with the firm of Somach Simmons & Dunn for the past 13 years. I make every effort to attend SLSA's monthly meetings to support SLSA and to take advantage of the education SLSA provides. I feel that if I can learn one thing from each meeting, no matter how minute, that I can only become a better legal secretary and an asset to my firm. I have also met many wonderful people, and have made some life-long friendships. If by your vote, I am elected as Vice President, I am willing to take on the duties of the Vice President and fulfill them to the best of my ability. It takes a tremendous amount of effort on the part of the Board and committee chairs for SLSA to continually provide educational opportunities to its members and the legal community. I understand we need volunteers to help run the association so it can continue to provide the education we all need and I am willing to be a part of the team that does just that.



Summary of Qualifications for SLSA Office of Secretary - Jennifer Estabrook, CCLS

My name is Jennifer Estabrook and I am running for the office of Secretary. I have had the pleasure of being the Secretary for SLSA in the 2013-2014 fiscal year, and am hoping that you will once again vote for me. I have been a legal professional for over 20 years, and am currently employed as a legal secretary with the law office of Berry & Block. I achieved my CCLS certification in 2008. I have been involved with SLSA for many years and continue to volunteer my time to this organization. I am willing to continue to perform the duties of an SLSA officer and be a part of the team. I hope that, with your vote, I am able to continue to do so. Thank you.

Nominations and Elections Committee Report: Nominations for 2014-2015



Summary of Qualifications for Office of SLSA Treasurer - Elizabeth Madden, CCLS

I am the Legal Assistant and sole support staff at the Whittall-Scherfee Law Office. I handle all legal secretary and paralegal duties, plus office administration. This includes accounts payable, accounts receivable, and keeping the business checking accounts balanced. I have worked at the Whittall-Scherfee Law Office since 2003. I joined SLSA in 2005 and became a CCLS in 2008. I have served SLSA in the past by being on the Audit Committee, the Legal Professional of the Year/Boss of the Year committee, the CCLS chair, and the Benefits chair. I have also, multiple times, represented SLSA as a delegate, and have been the Advertising Chair since 2011. In 2013, I had a fabulous time co-chairing the Reno Bus Trip.

SLSA is an organization that is important to me and I want to show my appreciation by serving as your treasurer. I do not take this responsibility lightly and will endeavor to attend all meetings and present accurate financial reports on a timely basis. I look forward to becoming a part of the leadership team of SLSA. Your votes are greatly appreciated.



Summary of Qualifications for SLSA Delegate - Cyrene Farrell, CCLS

I am Cyrene Farrell, CCLS, and I am asking for your vote as one of the three delegates to represent Sacramento LSA at LSI's Annual Conference this May. I have been a member of SLSA since 1999 and served on the executive board from 2001 - 2011. I have held all of the executive board positions over the years, except for that of Secretary. I also had many of the chair positions during those 10 years. I was the Editor of LSI's *The Legal Secretary* for two years. I graduated from MTI in 1993 as a Legal Specialist and worked in Family Law for six years before joining Mennemeier Glassman LLP in 1999. Today, I serve as a paralegal to Eric Glassman, who specializes in Broker/Dealer Arbitration and Litigation. I am also the Billing Coordinator and Docketing Clerk for the firm. Additionally, I teach the Introduction to Paralegalism class at MTI College. For many years I attended conferences on behalf of SLSA. I served as a delegate many times, and would very much appreciate an opportunity to do so again. I understand the importance of the role of the delegate and how the decisions we make will affect our association. I thank you for your vote.



Summary of Qualifications for SLSA Delegate - Anne French

My name is Anne French and I am running for the position of Delegate for LSI's 2014 Annual Conference. I have been a member of the Sacramento Legal Secretaries Association since 2005. Since that time, I was on SLSA's Board as Vice President from 2010-2011. I have been the Scholarship Chair and Lunch Lessons Chair for the past two years. I have attended LSI's Annual Conference as a delegate for SLSA for the past three years and feel that my experience and knowledge as a representative will serve the association well. I hope that you will vote for me to once again represent SLSA as a Delegate for this year's annual conference.

Nominations and Elections Committee Report: Nominations for 2014-2015



Summary of Qualifications for SLSA Delegate - Corene E. Rodder

I am asking for your vote as one of the SLSA delegates for the LSI Annual Conference being held in Concord, CA in May 2014. It has been my pleasure to serve in the legal field since 2002 supporting a sole proprietor and currently working as a Legal Secretary in the office of Somach Simmons and Dunn. My areas of expertise are general personal injury, support with cases in both state and federal court, trial preparation and support, compilation of complex corporate documents, and all aspects of executive level support.

I have been a member of SLSA since 2011 and have the privilege of serving as 2013-2014 editor of *The Legal Eagle*. As your delegate, I will strive to make informed decisions and vote according to the best interests of SLSA and its members. Thank you for your consideration.



Summary of Qualifications for SLSA Delagate - Heather M. Rodriguez, CCLS

My name is Heather M. Rodriguez, CCLS, and I would be honored to have your vote as one of the delegates to the LSI Annual Conference in May 2014. I am the Office Manager/legal secretary for Carroll, Burdick & McDonough LLP ("CBM") in downtown Sacramento. I work with the public sector labor law attorneys. I have been at CBM almost 9 years and I am very proud to work for such a wonderful firm and extraordinary people. I took the CCLS exam in October 2013 and successfully passed. I graduated from Heald Business College in 1995 with a certificate in legal office administration/studies. I am currently a Notary Public and have been for a little over 11 years. I have been in the legal field for 19 years, all of which were in the Sacramento area.

I have been a member of the Sacramento Legal Secretaries Association since 2011 and a past member of Placer County Legal Professionals Association. I have never attended a conference, but I look forward to attending as one of the SLSA delegates. I am aware of the duties expected of me and I am confident in my ability to carry out the delegate tasks. I ask for your vote to attend the LSI Annual Conference in Concord as a SLSA delegate.





A MUSICAL JOURNEY
 WITH
MT. DIABLO LEGAL PROFESSIONALS ASSOCIATION
 MAY 15-18, 2014
 LSI ANNUAL CONFERENCE
 HILTON HOTEL
 CONCORD, CALIFORNIA

CONFERENCE REGISTRATION FORM

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

Please Check If Applicable and Include Title:

State Officer _____
 State Chairman _____

Please Check if You Are:

Governor CCLS PLS

Scrip (Includes Registration, Welcome Reception, Banquet and Brunch)

	<u>By Check*</u>	<u>By PayPal/Credit Card*</u>	
Postmarked on or Before April 15, 2014	\$120.00	\$125.00	\$ _____
Postmarked April 16, 2014, or later	\$130.00	\$135.00	\$ _____

Individual Tickets

Registration by April 15, 2014	_____ @	\$20.00	\$21.00	\$ _____
Registration April 16, 2014, or Later	_____ @	\$30.00	\$31.50	\$ _____
Welcome Reception (Friday)	_____ @	\$25.00	\$26.00	\$ _____
Governor's Luncheon (Friday)	_____ @	\$35.00	\$36.50	\$ _____
President's Luncheon (Friday)	_____ @	\$35.00	\$36.50	\$ _____
Newcomer's Luncheon (Friday)	_____ @	\$35.00	\$36.50	\$ _____
CCLS/Member Luncheon (Saturday)	_____ @	\$35.00	\$36.50	\$ _____
Saturday Night Banquet	_____ @	\$51.00	\$53.00	\$ _____
Sunday Brunch	_____ @	\$30.00	\$31.00	\$ _____

(Indicate Choice: _____/Ham & Eggs, or _____/Quiche (Vegetarian))

Total Amount PAID \$ _____

Check All That Apply:

_____ Vegetarian Meal(s) Requested

_____ Food Allergies: _____

* To pay by PayPal or Credit Card, visit MDLPA's website, www.mt DiabloLPA.info, and follow the link to "PayPal/Credit Card." A convenience fee is applied to PayPal/Credit Card transactions. A discount is given for payment by check. Checks should be made payable to "MDLPA."

Mail Payment and this form to: Natalie Chop, CCLS, 1334 Louisiana Drive, Concord, CA 94521.

For General Information Contact:

Registration Chair – Natalie Chop, CCLS, (925) 746-6498, nchop@bpbllp.com or

Conference Co-Chairs – Maria Bishop, CCLS, (925) 284-7788 – maria@mtdiabloLPA.info or

Cristina Moreno, (925) 939-9933, cmoreno@angius-terry.com

NO REFUNDS AFTER APRIL 30, 2014



A MUSICAL JOURNEY
WITH
MT. DIABLO LEGAL PROFESSIONALS ASSOCIATION
MAY 15-18, 2014
LSI ANNUAL CONFERENCE
HILTON HOTEL
CONCORD, CALIFORNIA

HOTEL REGISTRATION INFORMATION

HILTON CONCORD HOTEL
1970 DIAMOND BOULEVARD
CONCORD, CA 94520
PH: (925) 827-2000

ACCOMMODATIONS: (PLUS APPLICABLE TAXES AND FEES)

ROOM RATES: Single: \$109.00 Triple: \$119.00
 Double: \$109.00 Quad: \$129.00
 Rollaway: \$15.00

TAX: 13%

OTHER CHARGES: \$.10/per night tourism fee

To make reservations online/telephone:

http://www.hilton.com/en/hil/groups/personalized/C/CONCORD-LSI-20140514/index.jhtml?WT.mc_id=POG

Group Name: Legal Secretaries, Inc.
Group Code: LSI
Phone Number: (925) 827-2000

For General Information Contact:

Registration Chair – Natalie Chop, CCLS, (925) 817-3868, natlovesmarykay@yahoo.com or
Conference Co-Chairs – Maria Bishop, CCLS, (925) 284-7788 – maria@mtdiabloipa.info or
Cristina Moreno, (925) 939-9933, cmoreno@augius-terry.com

HOTEL REGISTRATION DUE BY MAY 1, 2014

Sacramento Legal Secretaries Association

LUNCH LESSON

March 27, 2014

12:00 PM to 1:00 PM

"E-Filing with the Third District Court of Appeal"

Presented by Colette Bruggman

Assistant Clerk/Administrator – Third District Court of Appeal

Location: Downey Brand LLP, 621 Capitol Mall, 18th Floor, Sacramento, CA 95814

Cost: \$20 LSI Members, \$25 Non-LSI Members

NO REFUNDS. NO SHOWS WILL BE BILLED.

Reservations due March 21, 2014

Lunch will be provided. Public parking is available in the building for a fee.

RSVP to: Anne French
c/o Downey Brand LLP
621 Capitol Mall, 18th Floor
Sacramento, CA 95814
Tel: (916) 520-5268 / Fax: (916) 520-5668
E-mail: afrench@downeybrand.com

Make checks payable to: SLSA



*****Registration begins at 11:45 AM, and the Speaker will begin promptly at Noon*****

Name: _____

Firm: _____

Mailing Address: _____

Daytime Phone No.: _____ E-mail: _____

Are You A Member of SLSA? Yes No

Are You A Member of Another LSI Association? Yes No

If Yes, Which Association? _____

Check Here If You Would Like SLSA Membership Information: _____

Do You Require an MCLE or CCLS Certificate?

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 0.75 hours.



March 2014

March 9 – Daylight Savings Time begins. Remember to set clocks forward one hour!

March 10 -- SLSA Executive Board Meeting. 5:30 PM. Carroll, Burdick & McDonough, 980 Ninth Street, Suite 380, Sacramento, CA. All members welcome.

March 14 -- RSVP Deadline for March 20 SLSA Regular Membership Meeting.

March 15 – California Certified Legal Secretary Examination.

March 19 – Deadline to register for LSI Webinar on Affordable Care Act.

March 20 – SLSA Regular Membership Meeting, Courtyard Marriott, 4422 Y Street, Sacramento, 5:30 PM Meet and Greet, 6:15 PM Dinner. Speaker: Hal Bartholomew, Esq. Topic: Family Law. SLSA Election of 2014-2015 Officers and Delegates to May 2014 LSI Annual Conference.

March 21 – Deadline to RSVP for March 27 Lunch Lesson.

March 22 – Placer County LPA's Bunco Event, Noon to 4 PM, DeWitt Senior Center, Auburn, CA.

March 24 -- Deadline to submit bulletin articles to the Editor for the April issue of *The Legal Eagle*.

March 26 – LSI Webinar: "Affordable Care Act/ Covered California." 12:30-1:30 PM.

March 27 – Lunch Lesson: "E-Filing with Third District Court of Appeal," at Downey Brand, 621 Capitol Mall, 18th Floor, 12 PM to 1 PM.

March 31 – Cesar Chavez Day. State courts closed.

April 2014

April 5 – Bay Area Legal Forum Spring 2014 Semi-Annual Seminar, Doubletree Hotel, Pleasanton, CA.

April 11 - RSVP Deadline for April 17 SLSA Regular Membership Meeting.

April 14 -- SLSA Executive Board Meeting. 6:00 PM. Carroll, Burdick & McDonough, 980 Ninth Street, Suite 380, Sacramento, CA. All members welcome.

April 17 - SLSA Regular Membership Meeting, Courtyard Marriott, 4422 Y Street, Sacramento, 5:30 PM Meet and Greet, 6:15 PM Dinner. Speaker: Michael Bromberg of Leadership Comedy. Topic: Stress Management. SLSA Annual Installation of Officers.

April 20 – Easter Sunday.

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

April 25 – Deadline to respond to LSI directives.

Submitted by Deseree Gamayo

SLSA's annual Federal Day in Court event was held on Tuesday, February 20, 2014, at the Hilton-Arden West. There were nearly 100 attendees this year! We were honored to have the following guest speakers from the U.S. District Court, Eastern District: Honorable Magistrate Judge Allison Claire; Law Clerk Kyle Owen; Wim van Rooyen, Courtroom Deputy for the Honorable Magistrate Judge Carolyn Delaney; and from the U.S. Bankruptcy Court, Nicole Sanchez-Gargalikis, Operations Help-Desk Analyst, and Cathy Guyer, Operations Support Specialist and Helpdesk Backup. Our speakers shared common filing and procedural errors that they encounter, and provided updates on local rules and procedures.

Nicole Sanchez-Gargalikis and Cathy Guyer spoke about common filing questions and what you could do to help the Court when filing. They cautioned filers to be aware of the PDF you are uploading. It must be clear, right-side up, have the correct case number and caption. If you are ever unaware of what you have filed, you can check your e-filing history.

The Court is currently offering WebEx training twice a month. However, soon the training will be replaced with a video. The Court will soon be asking all filers to designate a primary e-mail address. This e-mail address will be the direct contact address between the Court and firms. It will not immediately be mandatory, but soon will be. The Court is currently working on a link where you can withdraw your proof of claim. This can only be done if the proof of claim was originally filed as a PDF.

Some rules/forms that have been revised include: guidelines for preparation of documents which include sample forms to file; approved Financial Management Course Certificates are now allowed to be e-filed; Chapter 7 fee waiver, Schedule J, I, and subpoenas.

The District Court speakers gave a thorough presentation from a criminal and civil standpoint. It was extremely informational on the way criminal cases are handled in Federal Courts. One thing I learned was that Federal Court does not have bail bonds. They have unsecured bonds, which is simply a signature bond. The Court also emphasized how helpful it is for all parties to familiarize themselves with the USDC rules

and website.

Ways to determine if a case should be assigned to the District Court are as follows:

Cause of action is federal based;

There is a diversity in jurisdiction;

Case was removed from state court.

It was suggested that Judicial Council forms not be used when filing with the District Court, as they are not familiar with the forms. When filing motions, please be sure to check Local Rule 3.02. The Court urged the practice of consenting to a Magistrate Judge in all cases. This will help move the case along in a more timely fashion. Civil dispositive motions are to be heard by the District Judge and discovery motions are heard by the Magistrate Judge (unless a consent to Magistrate Judge has been filed).



Nicole Sanchez-Gargalikis, Cathy Guyer,
and Lynne Koroush, CCLS

The question was asked about how high-profile criminal cases are they treated differently than other criminal cases and how they affect civil cases. We were informed that criminal matters have different rules and take priority; therefore, it can cause delays in civil matters. As far as high-profile cases being treated differently, our speakers responded "Each case demands unique attention." It was also confirmed that

(Continued on page 13)

(Continued from page 12)

Senior United States District Judge Lawrence K. Karlton will be retiring at the end of the year.

Thank you to our guest speakers for making our Federal Day in Court event such a success and providing us with such great information. If you have any suggestions on how we can improve future Day in Court events, or would like to help the new 2014/2015 Day in Court Chair, feel free to email me at dgamayo@stonegraves.com.



Kyle Owen and Wim van Rooyen

Federal Day In Court: Thank you to our Vendors!

Submitted by Crystal Rivera

To Our Vendors – We Appreciate You So Much!

THANK YOU Vendors! We had ten vendors participate at our February 20th Federal Day-In-Court Meeting. We had a great turnout and the event was another success! We were pleased to see some more new vendors.

Capitol Digital Document Solutions

Ron Bodenmann

Compex Legal Services, Inc.

Kelly Munson

Jessica Taft-Williams

First Legal

Jim Pinter

Litigation Services

Morgan Albanese

Regi Nand

The Pampered Chef

Robin Grossman

Ray Morgan Company

Tom Jops

Sacramento Legal Video Center

Jaci McAleer

Sean McAleer

U.S. Legal Support

Johmar Gasphar

Jenoa Derdowski

Valpro Attorney Service

Henry Valentin

Veritext Court Reporters

Marj Walker

Wall Street Reporting

Elena Garcia-LaBonte

Michelle Ramirez

WE TRULY APPRECIATE OUR VENDORS, AND THANK YOU AGAIN FOR SUPPORTING SLSA!

FEDERAL DAY IN COURT VENDORS



Hutchings Litigation Services



Wall Street Reporting



Veritext Court Reporters



Ray Morgan Co.



Capitol Digital Document Solutions

FEDERAL DAY IN COURT VENDORS



Compex Legal Services, Inc.



Sacramento Legal Video Center



The Pampered Chef



First Legal



U.S. Legal Support

Submitted by Launa Atkinson, CCLS



CCLS Quiz

1. Civil Active List – A list of pending cases awaiting assignment of a trial date.
2. Conform – To stamp with the court’s filing stamp evidencing date of filing.
3. Demurrer – A formal objection to a pleading.
4. Ex Parte – It refers to a special hearing among all counsel at a time when the court is not generally in session or is in session for special purposes only.
5. In Camera – In chambers.
6. Judgment – The official decision of the court in a proceeding.
7. Jury – A specified number of persons selected to determine questions of fact, render a verdict, or decide a contested matter.
8. Peremptory Challenge – An objection made to a juror for which no cause is given.
9. Prayer – That part of a pleading which sets forth the relief sought or the orders the party wishes the court to make.
10. Trial De Novo – Trial from the beginning; to start anew.

CCLS Vocabulary

True or False?

1. Non-expert discovery cutoff is 30 days before the initial trial date.
2. If the discovery cutoff date falls on a Saturday, Sunday, or holiday, the last day shall be the next court day closer to the trial date.
3. A non-party witness is not entitled to a witness fee or mileage for appearing at trial.
4. Advance jury fees must be deposited with the court 25 days prior to the initial trial date.
5. In an expedited jury trial, each side has three hours to put on all witnesses, present evidence, and argue the case.
6. In an expedited jury trial, there are still 12 jurors, but each side gets fewer peremptory challenges.
7. All parties need not consent to an expedited jury trial.
8. No later than 15 days before an expedited jury trial, a pretrial conference will be conducted by the court.
9. A party in whose favor a judgment is ordered and who is allowed to claim costs, must file a memorandum of costs no later than 15 days after the date of mailing of the notice of entry of judgment.
10. A prevailing party does not need to notify anyone when they receive only partial payment of the judgment.



SLSA'S SPRING CHARITABLE PROJECT

SLSA's is collecting items to donate to the local animal shelters – Sacramento SPCA, and the City and County Animal Shelters.

Some of the items we are looking for:

Dog & cat food (dry, canned, puppy/kitten food, formula, etc.)
Dog & cat treats
Nursing bottles (4 or 8 oz.)
Dog & cat toys (Kongs, squeaky toys, rope toys, balls, fuzzy mice, etc.)
Cat scratching posts
Washable beds / bedding
Towels, blankets, bedspreads/comforters (no sheets or clothing)
Puppy potty-training pads
Shoe boxes
Rescue Remedy
Feliway Diffuser refills
Heating pads
5 gallon buckets w/ lids
New dog leashes, collars, harnesses
New cat collars (safety/break-away type)
New litter boxes and litter-box scoopers
Cat litter (clay or clumping-type)
1 to 5 gallon plastic Ziplock-type food storage bags



For rabbits: Timothy Hay; paper bags and smaller-sized cardboard boxes (for crawling inside, scratching, chewing); cardboard rolls from paper towels or toilet paper; unvarnished wicker baskets/boxes; cat toys that roll or can be tossed; nudge and roll toys (like large rubber balls, empty Quaker Oat boxes & small tins); "Busy Bunny" toys (edible toy treats); plastic rainbow slinkies; etc.

Items can be brought to SLSA's March and April 2014 Dinner Meetings. If you are unable to attend either of these meetings and have items to donate, please contact Crystal Rivera to make other arrangements.

SLSA will be delivering the donated items to the shelters after April 17th

Rebecca Lerma, Chair rmlema@stoel.com; (916) 319-4790
Crystal Rivera, Co-Chair crivera@somachlaw.com; (916) 469-3813
Connie Kelley, Co-Chair kelleyco@qtlaw.com; (916) 442-1111

Whoof Whoof = Thank You!

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Answers to the CCLS Quiz

1. (True, LOPM B-58)
2. (True, LOPM B-58)
3. (False, LOPM B-61)
4. (True, LOPM B-63)
5. (True, LOPM B-65)
6. (False, LOPM B-65)
7. (False, LOPM B-65)
8. (True, LOPM B-66)
9. (True, LOPM B-66 – 66.1)
10. (False, LOPM B-66.1)

On the Move:

Jaymie Moralez, SLSA's Employment Chair and Nominations & Elections Chair, has moved to the Third District Court of Appeals. Her new e-mail address is Jaymie.Moralez@jud.ca.gov.

Corene Rodder, SLSA's 2013-2014 Editor of *The Legal Eagle*, has moved to Somach Simmons & Dunn. Her new e-mail address is crodder@somachlaw.com.

President Lynne Koroush, CCLS, has moved to Carroll, Burdick & McDonough's Sacramento office. Her new contact information is as follows:

Lynne Koroush, CCLS
Carroll, Burdick & McDonough
980 9th Street, Suite 380
Sacramento, CA 95814
(916) 551-3360 Bus.
lkoroush@cbmlaw.com

Secretary Jennifer Estabrook, CCLS, is now with the law office of Berry & Block. Her email address is jestabrook@berryblock.com.

Good News!

It was wonderful to see LSI Past President Mary S. Rocca, CCLS, at LSI's Third Quarterly Conference in Modesto. She looked great, and we all got to share in her good news that she has completed her treatments for breast cancer and has recently been declared cancer-free! What wonderful news for Mary and her family! Please keep Mary in your thoughts and prayers for continued good health.

"Thanks for the Memories"

It was a very special reunion of SLSA members at LSI's Third Quarterly Conference in Modesto the weekend of February 21-23. Former SLSA Governor Melanie Herman, CCLS, was in attendance as a new member of Mt. Diablo LPA, and made a special presentation to SLSA Past President Dawn Forgeur, CCLS. Although Dawn did not have a historian during her two years as president, unbeknownst to her, Melanie and a few other members collected mementos and photos to put together a scrapbook for Dawn. Melanie surprised Dawn in Modesto by presenting her with the scrapbook. It was a great surprise and special moment for Dawn. Thanks for the memories, Melanie, and thanks to Dawn for two great years as SLSA President!



LSI Third Quarterly Conference, February 21-23, 2014, Modesto, CA



Astrid Watterson, CCLS, Lynne Koroush, CCLS, and Dawn Forgeur, CCLS



Celebrating Tammy Hunt, CCLS's Birthday at Conference.



Shakespearian Reading at Saturday Evening Banquet



Lugene Borba, CCLS, Astrid Watterson, CCLS, LSI Parliamentarian, Linda Duarte, LSI Executive Advisor



Dawn Forgeur, CCLS, and Heather Nowak, Orange County LSA



Tammy Hunt, CCLS



Shoe decorating contest at LSI Conference



Don Lee, LSI Honorary Member at Sunday Brunch





Submitted by Elizabeth Madden, CCLS

Michelle Chavez, CCLS, and I attended the membership luncheon on February 22, 2014, at LSI's Third Quarterly Conference in Modesto.

There were approximately 16 people in attendance. Of those attending, this was the first conference for three of them. The luncheon was presided over by LSI Vice President Mary Beaudrow, CCLS.

The tables were decorated with a bottle of wine, a wine glass, and bunches of grapes. We had a great lunch of salad with three different dressing choices. Once the salad was consumed, we were given a dish of grilled chicken over penne pasta topped with marinara sauce, broccolini and grilled carrots. Iced tea, water, and coffee were also served.

The following topics were discussed:

- How to keep members active during the summer months?
- How not to seem too aggressive in approaching prospective members?
- Ideas for recruiting new members.
- Review LSI's Chapter Achievement form.

Evidently some associations go dark for one or two months each summer. One of these associations puts on a seminar on a Saturday instead of having the normal monthly dinner meeting. One association has a silent auction instead of a meeting in the month of August. This appears to be a big moneymaker for that association.

It was suggested that that if money is an issue, associations could consider coming to the dinner for free (either don't eat, or at the expense of the organization), if the topic is of interest. This can happen at any time during the year.

One of the members at the luncheon stated that she carries membership applications in her purse. Most thought that was a bit aggressive, and most thought that either a phone call or an e-mail to the prospective member would not be considered aggressive. Prospective members should feel as though they are being welcomed to the meetings for network and education purposes. Inquiries

regarding membership can be handled as a follow-up.

The following ideas were presented:

BUNCO

BINGO

Free happy hour (limit of 1 or 2 free glasses of wine)

Get ideas (topics) for future meetings:

Membership meeting

Mock trial

Toward the end of the luncheon Mary brought up a couple of items that would be discussed in the General Assembly later that afternoon:

LinkedIn: LSI has a LinkedIn page and she hopes to set up a Facebook page in the near future.

Mary will ask (or has asked) the LSI board to transfer \$2,000 from the savings account to the general account. Her wish is that wherever a conference is taking place, that LSI be able to give five of the local associations enough money for a scrip ticket to allow one member from each association to attend that conference. These five associations would be within driving distance to the conference. The details of how those associations and each member would be chosen were not discussed.



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

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

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

NAME OF APPLICANT _____ ARE YOU A CCLS? YES NO

EMPLOYER _____ POSITION _____

BUSINESS ADDRESS _____ CITY/ZIP _____

BUSINESS PHONE _____ BUSINESS E-MAIL _____

RESIDENCE ADDRESS _____ CITY/ZIP _____

RESIDENCE PHONE _____ RESIDENCE E-MAIL _____

EMPLOYMENT IN THE LEGAL FIELD (INCLUDE POSITIONS, DATES) _____

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

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

IT SHALL BE THE DUTY OF EACH MEMBER OF LEGAL SECRETARIES, INCORPORATED TO OBSERVE ALL LAWS, RULES AND REGULATIONS NOW OR HEREAFTER IN EFFECT RELATING TO CONFIDENTIALITY AND PRIVILEGED COMMUNICATION, ACTING WITH LOYALTY, INTEGRITY, COMPETENCE AND DIPLOMACY, IN ACCORDANCE WITH THE HIGHEST STANDARDS OF PROFESSIONAL CONDUCT. (Dedicated to the memory of Joan M. Moore, PLS, CCLS, LSI President 1980-82.)

SIGNATURE OF APPLICANT _____ DATE _____

SPONSOR (IF ANY) _____ APPLICATION APPROVED _____

SLSA MEMBERSHIP CATEGORIES/ANNUAL DUES (Check One)

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

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

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

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

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

SLSA MEMBERSHIP APPLICATION (continued)

Name: _____ Birthday (MO/DAY) _____

Talents, Interests, Hobbies: _____

YOUR SPECIALTY:

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

EDUCATION:

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

TYPE OF OFFICE:

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

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

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

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

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

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

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

REGULAR MAIL PREFERENCE? [] **BUSINESS** [] **RESIDENCE**

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

How did you hear about SLSA? _____

Please make your **check payable to SLSA**. Mail payment with this form to:

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



**Sacramento Legal Secretaries Association
Membership Renewal Invoice**

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

Make check payable to:
Sacramento Legal Secretaries Association

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

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

MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

NAME: _____ Are you a CCLS? Yes / No

BIRTHDAY: _____

TITLE: _____

EMPLOYER: _____

BUSINESS ADDRESS: _____

CITY, STATE & ZIP: _____

BUSINESS PHONE: _____

BUSINESS FAX: _____

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

RESIDENCE ADDRESS: _____

CITY, STATE & ZIP: _____

RESIDENCE PHONE: _____

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

YOUR SPECIALTY:

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

MAILING/LISTING INFORMATION:

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

Where do you want e-mail delivered? Business Residence

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

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

INVOLVEMENT:

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

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

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

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

Reading Cell Phone Maps While Driving is Legal

In a February 27, 2014, decision handed down by California's Fifth District Court of Appeal, drivers in California can legally read a map on their hand-held cellphones while behind the wheel. The Court of Appeal reversed the case of a Fresno man who was ticketed in January 2012 for looking at a map on his iPhone while stuck in traffic. The driver challenged the \$165 fine. In their 18-page ruling, the Appellate Court judges said California's law that prohibits people from talking on their cellphones without a hands-free device could have been written more clearly, but it doesn't apply to looking at maps on cellphones. The law the CHP officer used to ticket the driver applies specifically to people "listening and talking" on cellphones, not using their mobile phone in other ways, the Court said.



March Birthdays



Happy Birthday to the following March babies!

Elizabeth Madden, CCLS	March 4
Whitney Squire	March 18
Connie Kelley	March 21
Michelle Chavez, CCLS	March 24

CHANGES?? UPDATES??

Are you an SLSA member who has moved? Changed jobs? Been promoted? Recently engaged or married? New addition to the family? We want to know about you!! Let us celebrate your accomplishments with you during the good times, and support you during the tough times. Please send your news to treasurer@slsa.org



Sacramento Legal Secretaries Association Name/Address Change Reporting Form

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

CHANGES IN MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

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

CHANGE IN SPECIALTY:

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

CHANGES TO MAILING/LISTING INFORMATION:

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

Where do you want e-mail delivered?

Which address should be listed in the membership roster?

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

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

Please submit to:

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

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Editor's Note



Editor-Corene E. Rodder

The Legal Eagle always welcomes letters and article suggestions from readers. Please send them to: Corene E. Rodder, c/o Somach Simmons & Dunn, 500 Capitol Mall, Suite 1000, Sacramento, CA 95814 or crodder@somachlaw.com.

The Sacramento Legal Secretaries Association reserves the right to edit articles and letters sent in for publication. Unless stated otherwise in the "Dates to Remember" section of the bulletin, the deadline for all submittals is the Monday after the general meeting of the month preceding the month of publication. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is distributed with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If legal advice or other expert assistance is required, the service of a competent, professional person should be sought.

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

Benefits



Kimberly Ann Smith

Submitted by Kimberly Ann Smith

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

Monthly educational programs and newsletters are provided by local associations.

General educational programs are offered at each LSI conference free to anyone wishing to attend. Topics vary among specialized areas of law, ethics, law office products and management, and personal development. Visit www.lsi.org and click the LSI Events tab for more information about upcoming LSI Events.

Many local associations offer study groups for members interested in preparing to take the California Certified Legal Secretary (CCLS®) examination. Information on the CCLS examination can be found by clicking on "California Certified Legal Secretary."

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

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SAVE THE DATE!



SAVE THE DATE!

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Presents Its

SPRING 2014 SEMI-ANNUAL SEMINAR

Saturday, April 5, 2014

**Doubletree by Hilton Pleasanton at the Club
7050 Johnson Drive, Pleasanton, CA 94588**

8:30 a.m. – 11:45 a.m.

ESTATE AND TRUST LITIGATION

Speakers: Robyn Christo/Elizabeth Nuss, Gaw Van Male, Napa, CA

PREPARING FOR TRIAL

Speakers: Nancy L. Fineman/Brian M. Schnarr, Cotchett, Pitre & McCarthy, LLP, Burlingame, CA

FAMILY LAW: DECLARATIONS OF DISCLOSURE

Speaker: Marisa Dane, Flicker, Kerin, Kruger & Bissada, LLP, Menlo Park, CA

BASIC CIVIL LITIGATION: Who, What, When, Where, How

Speaker: Bradley Bening, Willoughby, Stuart & Bening, San Jose, CA

1:15 p.m. – 4:30 p.m.

ESTATE PLANNING FROM A TO Z

Speaker: Jennifer Thaete, Law Offices of Jennifer Thaete, Livermore, CA

CIVIL SUBPOENA LAWS FOR THE STATE OF CALIFORNIA

Speaker: Jim Ayer, Titan Legal Services, Inc., Torrance, CA

ETHICS FOR EVERYONE (1:15 p.m. – 3:15 p.m.)

Speaker: Diane Mecca, Abrams College, Modesto, CA

BASIC CIVIL LITIGATION: RESEARCH SKILLS AND HOW TO'S

Speaker: Bradley Bening, Willoughby, Stuart & Bening, San Jose, CA

The Bay Area Legal Forum has been approved as a provider of MCLE credit by the State Bar of California. The Forum certifies that the designated activities conform to the approved standards for education activities prescribed by the rules and regulations of the State Bar of California governing minimum continuing legal education.

Registration information at www.bayarealegalforum.org

LEGAL SPECIALIZATION SECTIONS

Of LEGAL SECRETARIES, INCORPORATED

2013-2014 MEMBERSHIP APPLICATION/ANNUAL RENEWAL FORM

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

Mail to: **Cheryl L. Kent, PLS, CCLS, Legal Specialization Sections Coordinator**
P. O. Box 12082, Pleasanton, CA 94588

Enclosed is payment of my dues for the fiscal year **8/1/13** through **7/31/14** for the following Section(s). Please check appropriate boxes below for the sections you are joining.

Method of Payment: Check, payable to "LSI," enclosed VISA MASTERCARD

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

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

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

	NEW	RENEWAL	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Civil Litigation
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Criminal Law
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Family Law
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Law Office Administration
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Probate/Estate Planning
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	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: _____

PLEASE NOTE PREFERRED EMAIL ADDRESS. NEWSLETTERS, ROSTERS, AND OTHER COMMUNICATIONS, WILL BE SENT VIA EMAIL UNLESS REGULAR MAIL IS SPECIFICALLY REQUESTED.

I prefer communication via USPS (indicate preferred address: home work)

YEARS OF LEGAL EXPERIENCE: _____

SPECIALTY: _____

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

BENEFITS

LEGAL SECRETARIES INCORPORATED (LSI)

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

<p style="text-align: center;">WORKING ADVANTAGE Toll Free: (800) 565-3712 www.workingadvantage.com Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more. Member ID: Contact LSI Corporate Office, lsicorp@southernlink.com, or LSI Vice President</p>	<p style="text-align: center;">HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447696 (800) 654-3131 www.hertz.com</p>
FINANCIAL PROVIDERS	
<p style="text-align: center;">CAPITAL INVESTMENT ADVISERS Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 www.ciadvisers.com Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>	<p style="text-align: center;">LEGACY WEALTH MANAGEMENT Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz Offering discounted John Hancock Long Term Care Insurance and Life Insurance, Annuities, Retirement, Investment and Estate Planning, Mutual Funds, and 401K</p>
<p style="text-align: center;">DAVID WHITE & ASSOCIATES Wealth Accumulation and Preservation 3150 Crow Canyon Place, Suite 2000 San Ramon, CA 94583 (800) 548-2671 Contact: Ryan Gonzales (ext. 2682), rgonzales@dwnassociates.com, or Matt Kay (ext. 2628), mekay@dwnassociates.com Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance</p>	<p style="text-align: center;">ATHLETES BUSINESS CONSULTANTS Jory Wolf, President/Founder 350 10TH Avenue, Suite 1000 San Diego, CA 92101 Office: (858)886-9842 Cell: (510)919-9062 joryw@athletesbiz.com California Insurance License: 0E88330 Individual disability insurance solutions</p>
CREDIT UNIONS	
<p style="text-align: center;">LA FINANCIAL FEDERAL CREDIT UNION P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p style="text-align: center;">PROVIDENT CREDIT UNION 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 www.providentcu.org All LSI members are eligible to join.</p>

QUESTIONS AND CONCERNS CONTACT:
Mary J. Bendrow, CCLS, LSI Vice President
LSI Marketing Committee Coordinator
700 Santee Lane Unit 715, Pleasant Hill, CA 94523
Cell - (415) 717-5675
Marybend19@aatt.net

Revised 4/28/13



Submitted by Jaymie Moralez

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

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

posted within 48 hours.

It is the responsibility of the applicants to contact the employers, schedule interviews, exchange résumés, and to discuss benefits and salary, etc. All information is listed until notification to drop the name/position is given to the Employment Chair. Please contact Employment Chair Jaymie Moralez, at Jaymie.moralez@jud.ca.gov. If you wish your listing to be placed on our web page, please indicate your authorization to do so.

(3/12/14) Legal Assistant. Preeminent, boutique law firm in Sacramento specializing in natural resources and energy law is seeking a motivated and well organized legal assistant to join our team. Minimum requirements include 7+ years' experience in transactional work, strong familiarity with all aspects of litigation (state and federal), attention to detail, excellent client service skills, demonstrated verbal and written communication abilities, desire to work in a team-oriented environment, and proficiency in Word, Excel, and PowerPoint. Additional experience in dealing with regulatory agencies, including the California Energy Commission and California Public Utilities Commission, is desired but not required. Full benefits and competitive salary (DOE) included. This is a full-time position. Please send a cover letter, resume, and letters of recommendation to Tracy Hunckler at thunckler@daycartermurphy.com.

(2/21/14) Litigation Assistant/Paralegal. Law firm in downtown Sacramento is seeking an experienced litigation assistant/paralegal with a minimum of 5 years' experience in drafting discovery, motions, organizing records, and trial prep. Applicant must know state rules and procedures, be able to draft correspondence, motions and discovery, be a self-starter and able to work without a lot of supervision. This position requires exemplary organization skills, attention to detail, strong client service skills, excellent verbal and written communication skills, the ability to work well under pressure and to be a team player, and the ability to multi-task and set priorities while meeting deadlines in a fast-pace environment. Must be proficient in Word 2010, Excel, Outlook, CompuLaw, Adobe Acrobat Pro, and PowerPoint. Salary is DOE. Please send cover letter, salary history/requirements and resume to paralegalopportunity2014@gmail.com.

(2/18/14) Legal Assistant/Secretary – Boutique law firm in Gold River specializing in business litigation and transactions with an emphasis in representing financial institutions. Strong computer skills required, including Word and Word Perfect. Duties include preparing pleadings, drafting discovery, legal research, assisting attorneys, and organizing files. Please submit cover letter, and resume to gmoates@jps.net. This is a part-time position.

(2/6/14) Senior Legal Secretary – County of Nevada, Nevada City. The County of Nevada is currently accepting applications for a Senior Legal Secretary. Please click [here](#) for the job description. For salary information, position information and qualifications please see the job announcement.

(1/29/14) Legal Secretary. Construction defect/civil litigation law firm in Roseville seeks a full-time legal secretary with a minimum of 4 years experience. Must possess strong knowledge of legal forms, procedures, and court rules, as well as experience in e-filing and e-service. Position requires excellent organizational,

(Continued on page 33)

Employment Report (continued)

(Continued from page 32)

typing, and computer skills with specific knowledge in Word, Outlook, Legal Solutions, File & Serve Xpress, and Vision. Competitive salary and benefits. Friendly/casual and interesting work environment. Resumes will be accepted via email to dtofft@greenhall.com or fax to (916) 367-7491, attn.: Director of Human Resources.

(1/27/14) Legal Secretary. Auburn law firm seeks two full-time legal secretaries; one with a minimum of two years' experience in family law and the other with a minimum of two years' experience in personal injury and civil litigation. We are seeking candidates who are professional and have effective written and verbal communication and organization skills. Strong calendaring skills are a must! Duties include: Assisting the attorney and paralegal, calendaring, drafting correspondence, client telephone contact, and file maintenance to name a few. Experience with Microsoft Word and Outlook is a must. Experience with Word Perfect and Essential Forms is a plus. Please email cover letter with salary requirements and resume to shannon_clay@yahoo.com.

(1/24/14) Receptionist/File Clerk/Office Services. Midtown Sacramento law firm seeks full-time receptionist/file clerk with a minimum of 2 years office experience. We are seeking a candidate who is professional, courteous and team-oriented with effective written and verbal communication skills and excellent organizational skills. Attention to detail, good attendance and punctuality a must. Duties include: answering phones, greeting clients, filing, providing back-up support to office staff, processing mail, general housekeeping and office errands. Experience with Microsoft Word, Outlook and Excel essential; valid California Driver's License and high school diploma required. Hours: 8:00 a.m. – 5:00 p.m.; Salary \$12 - \$15 per hour, DOE; competitive benefits provided. Please email resume to bks@bkslawfirm.com or fax to 916-446-4018.

(1/22/14) Legal Assistant. Legal Assistant position available at local civil litigation firm. Candidate must have at least 3 years of experience at a civil litigation office. Must be professional, reliable, detail oriented, organized, timely, able to work under time pressure, and a self-starter. Daily tasks will include answering telephones, filing, legal calendaring, court filings, copying and scanning, data entry assignments and various other administrative tasks. Applicants should be familiar with California Rules of Court and local Court Rules relating to document filing and service procedures.

Salary is negotiable. Benefits are available after working 90 days. Please submit resume, cover letter and three references to sacramentohiringdirector@gmail.com. Applicants who do not submit all three documents will unfortunately not be considered.

(1/22/14) Litigation Legal Secretary. Low McKinley Baleria & Salenko, LLP has an opening for a litigation legal secretary with 7+ years experience, preferably in insurance defense. The position requires teamwork, strong organizational skills and a strong ability to handle a heavy law and motion desk. Must be proficient in MS Word and Outlook. Knowledge of Prolaw a plus. We offer a competitive salary and benefits. Please email resume to rgm@lmlaw.net.

(1/15/14) Legal Secretary - Sacramento Office. Locke Lord LLP, an international law firm, seeks legal secretary to work with litigation attorneys. We have a fast-paced, challenging position available requiring 5+ years previous legal secretarial experience. To qualify, must have excellent computer skills including Microsoft Word (with styles), Excel, and Power Point, prior experience with DeskSite or similar document management systems, detail oriented with the ability to multi-task, prioritize and manage workload as well as excellent written and verbal communication skills. Duties include: transcription, drafting pleadings and correspondence, time entry and file maintenance. We offer competitive salary/benefit package and an opportunity to use your skills in a pleasant/professional work environment. Please send resume to: recruiter@lockelord.com or fax to (312) 443-0530.

Submitted by Debbie Frias, CCLS



Scanning my state counterpart's "Blog," I have found a few interesting tidbits to share with our readers:

San Bernardino Superior Court Valley Reorganization (News Release date 2/24/14): The Court announces that the new

courthouse (San Bernardino Justice Center) will open for business in May 2014. In order to capture efficiencies in court operations in the Valley region, the Superior Court will reorganize the calendars for the Rancho Cucamonga District, Fontana District and San Bernardino District.

Due to space restrictions for articles in our bulletin, I am simply directing you to either the procedures blog on the LSI website, or by going to the Court's website for this 2/24/14 news release, which is very detailed.

As of January 15, 2014, San Diego County Superior Court accepts only certain types of documents at their filing window; this is at the Central Division Civil Business Office location.

Temporary Restraining Orders (Civil Harassment, Elder Abuse, Work Place Violence) and related filings; Petitions for Change of Name or Gender; Claim of Right to Possession or Third Party Claim; Ex Parte papers (for Dept. 6 or Dept. 7 only) Answers/ Responses to Unlawful Detainer; Complaints Petition to Withdraw Money from Blocked Account; Writs of Election; any document submitted with a Peremptory Challenge; any new Complaint or Petition of the Plaintiff/Petitioner will be seeking immediate relief from the court (example: setting an Ex Parte for issuance of a Temporary Restraining Order Pending a hearing on a Preliminary Injunction.

Any other documents not listed above must be time-stamped and dropped in the provided drop box.

Los Angeles County Superior Court - North District to Resume Handling Unlimited Jurisdiction Personal Injury Cases: Commencing 3/1/14, personal injury cases shall once again be filed and have pre-trial matters in unlimited jurisdiction handled at the North Valley District (Antelope Valley) Courthouse. Cases originally filed and heard there which were transferred to the Stanley Mosk Courthouse will be transferred back. Any new cases which are geographically under the Antelope Valley Court's jurisdiction will be filed there.

All court dates scheduled will remain on calendar, but the location will be at the North Valley District Courthouse unless otherwise noticed. The court will send out any reassignment orders by April 1, 2014.

Should the case require trial, the case will transfer to the Master Calendar Court in Department 1 of the Stanley Mosk Courthouse. From there, it will be assigned to a dedicated trial courtroom located throughout the county.

USDC-Central District of California: Effective immediately, this court is announcing the expansion of the Attorney Case-Opening Pilot Project. Attorneys may file almost all new civil cases online, using the Courts CM/ECF System. Most complaints and notices of removal may now be filed electronically, so long as the filing fee is paid online at the time of filing or no filing fee is owed. For more information, check out the court's website.

Sacramento Superior Court: Effective January 1, 2014, the Limited Civil Pretrial Calendar will be assigned to the Honorable Kevin R. Culhane, presiding in Department 13. The clerk of Department 13 may be reached at 874-7786. The calendar will be heard every Friday at 10 a.m., except on court holidays.



Submitted by Dawn Forgeur, CCLS

LSI's February Quarterly Conference was help from February 21-23, 2014, in Modesto. It was co-hosted by Merced and Stanislaus County LPAs and they did a great job! There was a lot of business for the governors this time, but since we had

three of the LSI Executive Board at our governors' luncheon to go over everything, it went quite smoothly during voting.

All of the following recommendations carried:

LSI Executive Committee Recommendation No. 1:

2.16 The general Chairman of each Quarterly Conference Committee shall prepare and transmit to the LSI President and the LSI Administrator, not later than 45 days after the Quarterly Conference, a report containing registration and financial information, the form provided in the Guidelines for Hosting LSI Conferences, which information shall be reported to the Board of Governors at the immediately-following Quarterly Conference. The Chairman shall prepare and deliver to the Chairman for the ensuing Quarterly Conference a file containing documents and information of assistance to the next chairman.

LSI Executive Committee Recommendation No. 2:

4.1 At the beginning of each fiscal year, members of the Executive Committee shall be assigned a reasonable area within which visits to Local Associations shall be made. A record of visitations shall be kept by the LSI President. The Executive Committee member attending a Local Association's event, must provide the President with a written report stating the date of the event and the purpose of the event (i.e., installation officer, regular meeting, special event, etc.). An Executive Committee member attending a Local Association's event, must prepare an expense report with his/her listed expenses incurred and provide the

original to the LSI Treasurer and a copy to the LSI President for review and approval.

LSI Executive Committee Recommendation No. 3:

The following items shall be available through Corporate Office at no charge: (a) Career Promotion Brochure; (b) CCLS Brochure; (c) Law Office Procedures Manual flyer; (d) LSI Legal Professional's Handbook flyer; (e) LSI Membership Application Form; (f) LSI Membership Brochure; (g) LSI Roster; and, (h) New Member packet; and (i) electronic version of the "Marketing LSI" PowerPoint presentation.

LSI Executive Committee Recommendation No. 4:

17.1.3 \$15 \$20 per diem for each day or part thereof travel or attendance is required.

LSI Executive Committee Recommendation No. 5:

17.4 A member of the Executive Committee attending the installation meeting of a newly-chartered Local Association shall be reimbursed actual expenses, not to exceed on night's lodging, round-trip transportation, and \$15 \$20 total per diem, as provided above.

LSI Executive Committee Recommendation No. 6:

Pursuant to LSI's Bylaw Article XIII, Section 2, subsection (c), Palo Alto LPA's charter shall be revoked and their charter surrendered to LSI. [Palo Alto LPA's remaining known members wished to dissolve, but do not meet the requirements for adoption of a resolution, and asked for LSI's assistance with this.]

LSI Executive Committee Recommendation No. 7:

The Executive Committee recommended transferring \$2,000 from the Capital One 360 (Business Savings Account) to fund the Local Association Promotion Program. [Five scrip tickets to local associations for each quarterly conference with be given away.]

(Continued on page 36)

LSI Continuing Education Council Recommendation No. 1:

CEC recommended that LSI sponsor a six-week BLS training online study course, beginning in March 2014.

LSI Continuing Education Council Recommendation No. 2:

CEC recommended that the cost for the BLS training online study court be set as follows: \$150 for LSI members and \$200 for non-LSI members.

[Remember, if you are a member of a local association, you are a member of LSI.]

LSI Continuing Education Council Recommendation No. 3:

CEC recommended that LSI sponsor a four-week online California Discovery course beginning in April 2014.

LSI Continuing Education Council Recommendation No. 4:

CEC recommended that the cost of the four-week online California Discovery course be set as follows: \$30 for LSI members and \$50 for non-LSI members.

LSI Continuing Education Council Recommendation No. 5:

CEC recommended that LSI approve the cost for the Day of Education be set as follows: \$85 for LSI members and \$105 for non-LSI members.

LSI Continuing Education Council Recommendation No. 6:

CEC recommended that LSI advance \$500 as hotel deposit for the Day of Education.



Parliamentarian's Corner: "The Business of Voting"



Submitted by Astrid Watterson, CCLS

For those members who are new to the association (and some who are not-so-new), I thought I would take the time to explain the use of the "red" member voting cards, as well as a few other items you receive upon arrival at an SLSA membership meeting.

When you arrive at a monthly dinner meeting, you should be usually be given the following items:

- a meal ticket
- a vendor door prize ticket
- a red member voting card
- a copy of the Secretary's Minutes
- a copy of the Treasurer's Report.

As a reminder, it is the duty of all members to vote on the business matters of this association. Upon arrival, you should review the Secretary's Minutes to ensure accuracy. If you spot an error in spelling or activity, please wait until the Chair (the President) asks for edits to the Minutes during the Secretary's Report. Don't be afraid to raise your hand and participate. When all edits, if any, have been made, the Chair will ask for the members to vote. At that time, you should raise your red member voting card to either vote in favor of approving the minutes as presented or as corrected, or vote against the minutes as presented or corrected. You would follow the same procedure for the Treasurer's report.

Robert's Rules of Order tells us that there are several methods of voting. A few common methods are: (1) Standing Vote, (2) Voice Vote, (3) Show of Hands, (4) Counted Vote, and (5) Ballot Votes.

A standing vote can be used whenever a two-thirds vote, instead of a majority vote is required to pass a motion. When you use the standing vote method, the Chair will typically ask all members to stand if they are in favor of the motion and then again if they are against. The Chair would then decide whether more stood in favor or against the motion. If it turns out that it is too close to tell which side had the majority, the Chair could resort to counting. A voice vote is the simplest and most common type of voting. The Chair usually asks that any in favor of the motion say "aye" and those against say "no." Based on the Chair's judgment of the voice vote, the Chair announces the results of the vote. A show of hands vote can be used when the group is small. You can visually see who is voting in favor and who is voting against the motion. It then falls on the Chair to decide if the motion had more show of hands in favor or against the motion, then announce the results of the vote. A counted vote is usually used to ensure the results of the motion.

If the Chair is not able to tell from a standing vote, a voice vote, or a show of hands vote if the motion passed or failed, the chair can use the counted vote to decide. Depending on the type of motion, it may require a majority or two-thirds vote in order to pass. Finally, we have the ballot vote. Our bylaws require that our elections be completed by ballot, meaning that all members are mailed the ballot with the motion written on it (in this case the list of the nominees for office) and required to return their vote (either by mail or by personal delivery).

In the past, SLSA has used the voice vote. However, there were times when it was difficult for the Chair to tell if only members were voting or if some of our guests were voting, also. In order to eliminate a potential problem, we began using the membership voting cards. The Registration Chair coordinates with the Membership Chair and figures out who is a member and who is not. If you are a member, you should have a red member voting card. We encourage you to use it when called for and participate – this is your association!



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**PLACER COUNTY LEGAL PROFESSIONALS' ASSOCIATION
PRESENTS**

SPRING LUNCHEON

AND

BUNCO

SATURDAY, MARCH 22, 2014

12:00 – 4:00 P.M.

SALAD AND BAKED POTATO BAR

**DEWITT SENIOR CENTER
11576 D AVENUE
AUBURN, CA**

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

**FOR INFORMATION/TICKETS CALL:
BETTINA JACOBSON (916) 616-8159**

**Checks can be made payable to: PCLPA
c/o Bettina Jacobson, PO Box 4907, Auburn, CA 95603**



The Legal Specialization Sections
of
Legal Secretaries, Incorporated
Presents:



Affordable Care Act/Covered California

A One Hour Webinar

Speaker: Colleen Callahan, CLU, CASL, LUTCFL Facilitator: Mary Lou Floyd, CCLS, M.S.
Colleen Callahan Insurance Services LSS Family Law Leader

WEDNESDAY, MARCH 26, 2014 ~ 12:30 – 1:30 p.m.

Registration Deadline: Wednesday, March 19, 2014

Cost: \$15 for members of any LSS section; \$25 for non-section members; \$35 for non-LSI members

Attendees will have an opportunity to email questions to Ms. Callahan prior to the webinar. Her email address will be provided with confirmation of registration.

Name: _____ PLS/CCLS/CLA/Paralegal E-mail: _____

Mailing Address/City/State: _____

Phone: Work/Home _____ Local Assn.: _____ LSA/LPA

Amount and Method of Payment: \$ _____ Check Credit Card Number _____

Name on Credit Card: _____ Card Expiration: _____

Type of Card: Visa _____ M/C _____ Card Verification No: _____

Mail, Fax, or Email completed form to:
Cheryl L. Kent, PLS, CCLS, LSS Coordinator
P.O. Box 12082, Pleasanton, CA 94588
925-523-3086 (fax) ~ clkcls@comcast.net

You will receive confirmation of registration and instructions regarding login to the webinar via email.
PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"

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

The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that this webinar has been approved for minimum MCLE/CLE credit of 1.0 hours by the State Bar of California.

2013-2014 Legal Specialization Section Leaders:

Civil Litigation: Dawn R. Forgeur, CCLS
dforgeur@stoel.com

Criminal Law: Jill Gardella
jgardella@nablaw.com

Family Law: Mary Lou Floyd, CCLS, M.S.
Loufoux7@yahoo.com

Law Office Administration: Tammy L. Hunt, CCLS
loaleader@tlhunt.org

Probate/Estate Planning: Kristi L. Edwards, CCLS
kledwards@justice.com

Transactional Law: Lisa De La O
ldelac@fitcheven.com

Chapter Achievement Points (CAPs)

Submitted by Dawn Forgeur, CCLS

Please email the governor [governor@slsa.org] if you attended any of the classes or any part of the February 2014 Quarterly Conference so that we may count your attendance for the Chapter Achievement Contest! As always, thank you to those who send me your updates every month, it's appreciated!

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



LSI CODE OF ETHICS

It shall be the duty of each member of Legal Secretaries, Incorporated, to observe all laws, rules, and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence and diplomacy, in accordance with the highest standards of professional conduct.

Dedicated to LSI Past President, Joan M. Moore, PLS, CCLS

CHAPTER ACHIEVEMENT REPORTING FORM 2013-2014

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

Please complete this form and mail or email it to SLSA's Governor, Dawn Forgeur, CCLS. If you attend a function and are not sure if it applies, include it below on the blank line provided and it will be determined if it applies.

Date of Event

Event

- _____ I submitted an article to *The Legal Secretary* magazine. (50 points)
- _____ I attended an LSI Quarterly or Annual Conference. (50 points)
- _____ I attended an Officer/Chairman Workshop at the Annual Conference.
How many? _____ (25 points)
- _____ I rented a car through Hertz with the LSI discount. (200 points)
- _____ I took the CCLS exam – Test Date: _____. (100 points)
- _____ I passed the CCLS exam – Test Date: _____. (200 points)
- _____ I recertified as a CCLS during the 2013-2014 fiscal year. (50 points)
- _____ I attended another association's monthly meeting, installation, or other function. (50 points)
- _____ I attended an educational workshop or seminar sponsored by SLSA or another local
association. (25 points)
- _____ I attended an educational workshop or seminar sponsored by a Forum, CEB, or
The Rutter Group. (25 points)
- _____ I am a member of at least one Legal Specialization Section. (50 points)
- _____ I am a member of all six Legal Specialization Sections as of March 31, 2014. (100 points)
- _____ I attended a Legal Specialization Section Seminar at Quarterly or Annual
Conference. How many? _____. (50 points per seminar)
- _____ I submitted an article for use in a Legal Specialization Section newsletter. (50 points)
- _____ I purchased the *Legal Professional's Handbook* (LPH). (200 points)
- _____ I purchased the *Law Office Procedures Manual* (LOPM). (200 points)
- _____ I purchased updates to the LPH. (100 points)
- _____ I purchased updates to the LOPM. (100 points)

Name: _____ Email: _____

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

“Simple Law Firm Procedures to Increase Workflow: Organizing your Mail”

Submitted by Lynne Koroush, CCLS

Written by Haley Odom*

Attorneys and legal staff devote time and effort to organizing their e-mail inboxes, but how often is paper mail organized? The paper that stacks up on your desk is just as distracting as having 1,000 emails in your digital inbox. Your desktop mail inbox pile likely contains a number of extremely important items.

Law firms can implement the following procedure to help their personnel overcome the paper:

1. Scan, scan, scan

From the moment the postman drops off the mail, the first step in your office protocol should be to scan these inbound items. If your law firm has a dedicated mailroom worker, the mail should be routed directly to them. All mail should be date-stamped and scanned in with the envelope attached. Once the items are date-stamped and scanned, the second step should involve an e-mail containing the scanned attachment (or a hyperlink to their location) to the recipient, the legal team surrounding the matter, and/or the appropriate staff. Step three involves the electronic and paper filing of the original item.

Several services on the market provide scanning technology that allows for scanned documents to be directly sent to all legal team members. This ensures consistency and accountability for viewing the mail. With this system, designate a team member to digitally file all scanned documents as well as filing the original, hard copy.

2. Folders

Paper mail cannot be reviewed every single day, especially if the lawyers are traveling or litigating. A workable solution involves an accordion folder system. The folders should be classified as Monday through Friday and “weekend.” If the folders are not accordion style, it is best if they can be different colors. Each day’s mail is time- and date-stamped, put in that day’s folder, which becomes a replacement for the attorney’s physical inbox. This keeps mail in order of receipt and helps keep the review of paper mail manageable. Use of different colored folders also gives a clear visual on how far behind an attorney is on their mail review.

An alternate way to use folders to help manage physical mail is to create an importance scale. Red for emergency, orange for same day review, yellow for weekly review, and blue for monthly review. Organizing mail in this fashion means that urgent mail is always seen first. The downside of utilizing this system is that communication between attorney and staff must be clear on what is important and what is not.

Many law firms are already paperless or are moving toward paperless offices. If this is the case in your firm, take the mail folder system digital. Use Microsoft Outlook’s “categories” in lieu of a physical folder. Establish the categories in the same manner as the physical folders: 1) a different color for each day of the week or 2) a different color per importance level.

3. Follow-up

Legal assistants and attorneys must create a follow-up system to ensure mail is catalogued and responded to in a timely manner. Once an item is date-stamped, scanned, and filed, don’t let it collect dust. An attorney’s paralegal or legal assistant is responsible for immediately calendaring any deadline contained in the mail item. Acceptance of the calendar entry by the attorney indicates that mail has been read. If an attorney decides that a folder system is for them, a “read by” stamp proves the attorney read the mail, which can now be filed in the physical case file.

There are many ways to organize your law firm’s paper mail, but consistency is the key to keeping important information and deadlines from falling through the cracks. Do not create a system that is too burdensome, but ensure that a safety net is instituted to keep you and your legal staff on top of the paper.

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ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION

Membership Meeting

In Debt? The Basics of Declaring Bankruptcy



Speaker: Matthew Grech, Esq.

In this program Mr. Grech will discuss the basics of Chapter 7 and Chapter 13 bankruptcies: their differences and commonalities, how to determine which is right for the individual, and the specific qualifications for filing each. The program will include a question-and-answer period.

Attendees will leave with a stronger understanding of the realities of bankruptcy protection and what to do and not to do before filing.

Date & Time

Tuesday, June 3, 2014

6 – 9 p.m.

Location

Buttercup Grill

229 Broadway, Oakland

Entrée Options:

- 1) **CHICKEN FETTUCCHINE PRIMAVERA** – Grilled chicken breast and fettuccine blended in Alfredo sauce with a medley of fresh vegetables. Served with a choice of dinner salad (*please specify dressing*) or cup of soup.
- 2) **COCONUT SHRIMP** – Jumbo shrimp dipped in a special tempura batter, rolled in coconut and deep fried, served with sweet and spicy dipping sauce, rice and fresh vegetables. Served with a choice of dinner salad (*please specify dressing*) or cup of soup.
- 3) **HOMESTYLE MEATLOAF** – Our own special recipe sliced thick and topped with gravy and onion straws. Served with garlic mashed potatoes and creamed spinach. Served with a choice of dinner salad (*please specify dressing*) or cup of soup.
- 4) **PHILLY** – Thinly sliced and grilled rib eye with sautéed onions, peppers and mushrooms, topped with melted Swiss cheese, served on a grilled sourdough loaf. Served with regular fries, curly fries or potato salad (*please specify*).

- All entrees are served with bread/butter, and soft drink, iced tea or coffee -

COST

\$25 per person

PLEASE NOTE: 24-hr cancellation required to avoid being charged for meals.

No-shows will be charged for their meal.

Please make checks payable to "ACLSA".

RESERVATIONS REQUIRED

Please submit your reservation and dinner choice to

Judy A. Martinez as soon as possible

RSVP Deadline: No later than Friday, May 30th at jmh1561@aol.com

ACLSA, a local association of Legal Secretaries Incorporated, an approved provider, certifies that this activity has been approved for minimum of 30 minutes of MCLE/CCLS continuing legal education credit by the State Bar of California and Certified Legal Secretary.

ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION

Membership Meeting

Speaker: David Mann



Substance Abuse in the Legal Profession: Prevention, Detection, and Treatment 2014

Mr. Mann provides a review of the brain chemistry of addiction and alcoholism, as well as a discussion of the behavioral and health consequences of the disease. Insights are offered into the personality traits of attorneys and the qualities of the legal profession that combine to make lawyers significantly more susceptible to addiction, and more difficult to treat, than the general population. The presentation includes a case study of an addict attorney, as well as a self-diagnosis exercise for attorneys to utilize if they are concerned that they may have a problem which needs to be addressed. Concluding remarks are directed towards both systemic and individual solutions to the problem, with references to specific strategies and resources available to attorneys. Mr. Mann approaches this very serious topic in a manner that incorporates humor and irony and invites attorneys to engage in a bit of sometimes much-needed self reflection.

Date & Time

Tuesday, May 6, 2014
6 – 9 p.m.

Location

Buttercup Grill
229 Broadway, Oakland

Entrée Options:

- 1) **FISH & CHIPS** – Fresh fish lightly battered and fried to a golden brown. Served with fresh cole slaw, fries and malt vinegar.
- 2) **CHICKEN FETTUCCHINE PRIMAVERA** – Grilled chicken breast and fettuccine blended in Alfredo sauce with a medley of fresh vegetables. Served with a choice of dinner salad (*please specify dressing*) or cup of soup.
- 3) **AVOCADO BURGER** – A plump patty served on an old fashioned bun topped with lettuce, tomatoes, red onions, avocado, Jack cheese and Thousand Island dressing. Served with a choice of fries, curly fries or potato salad (*please specify*).
- 4) **FRIED CHICKEN SALAD** – Mixed greens topped with chicken strips, blue cheese crumbles, sliced egg, tomatoes, caramelized walnuts and cornbread croutons (*please specify dressing*).

COST

\$25 per person

PLEASE NOTE: 24-hr cancellation required to avoid being charged for meals.

No-shows will be charged for their meal.

Please make checks payable to "ACLSA".

RESERVATIONS REQUIRED

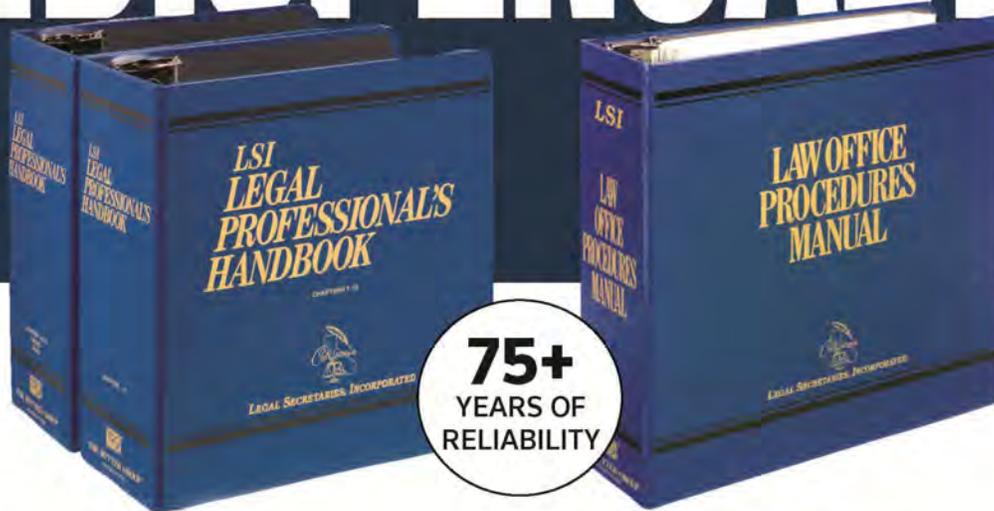
Please submit your reservation and dinner choice to

Judy A. Martinez as soon as possible

RSVP Deadline: No later than Friday, May 2nd at jmh1561@aol.com

ACLSA, a local association of Legal Secretaries Incorporated, an approved provider, certifies that this activity has been approved for minimum of 1.0 hour of Substance Abuse MCLE/CCLC credit continuing legal education credit by the State Bar of California and Certified Legal Secretary.

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Legal Secretaries, Inc. presents

DAY OF EDUCATION

When: April 12, 2014 **Where:** Sheraton Ontario Airport Hotel
429 North Vineyard Avenue, Ontario, CA 91764

Cost: \$85 - LSI Member / \$105 - Non LSI Member

(Price includes lunch. Registration deadline: 3/31/14 - no refunds after 4/4/14)

9:00 a.m. – 10:30 a.m.	9:00 a.m. – 10:30 a.m.
<i>Introduction to the Supreme Court and Constitution</i> Presenter: Hirbod Rashidi, Attorney at Law	<i>Judgment Enforcement</i> Presenter: Laura Crane, Esq. Best, Best & Krieger, LLP
11:00 a.m. – 12:30 p.m.	11:00 a.m. – 12:30 p.m.
<i>Ethics</i> Presenter: Hon. Jackson Lucky Riverside Superior Court	<i>Landlord/Tenant 101</i> Presenter: Wayne Templin, Esq. Law Offices of Wayne Templin
2:00 p.m. – 3:30 p.m.	2:00 p.m. – 3:30 p.m.
<i>Wine Law-What You Did Not Know!</i> Presenter: Michael Newcomb, Esq. Newcomb Law Group	<i>Adobe Acrobat</i> Presenter: Mikhail Globus, Product Training & Research Coordinator One Legal, LLC

Speakers and Topics are subject to change



Legal Secretaries, Incorporated, is an approved provider, and it is certified that these Seminars have been approved for minimum MCLE/CLE credit of 1.5 hours, by the State Bar of California; Adobe Acrobat has been approved for 1.5 hours of Non-Legal Secretary Science CCLS Credit

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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.

Hotel Accommodations: \$95.00 plus tax / **Group Code:** Legal Secretaries / **Website:** <https://www.starwoodmeeting.com/StarGroupsWeb/res?id=1403082545&key=B8A5B>

5th ANNUAL LEGAL TRIVIA THROWDOWN



HOSTED BY: Alameda County Legal Secretaries Association

DATE: Saturday, March 22, 2014

TIME: 11 a.m. to 3 p.m.

PLACE: Buttercup Grill, 229 Broadway, Oakland
(near Jack London Square – free parking is available at the restaurant
and adjoining hotel parking lot)

COST: \$20 per person (Cash or check payable to ACLSA can be paid at the event.)

MENU:

Chicken Caesar Salad: Served with your choice of grilled, lemon pepper or blackened chicken

Vegetable Omelet: Filled with fresh garden vegetables and Cheddar and Jack Cheese

Chicken Apple Sausage or Bacon and Two Eggs: Please specify how you would like your eggs cooked, sausage or bacon, O'Brien potatoes or hash browns.

Extra Omelet: A blend of avocado, bacon, mushrooms, sour cream and Cheddar and Jack cheese

Breakfast items served with orange juice, soft drink, iced tea, or coffee,
O'Brien potatoes or hash browns (Please specify). Includes a choice of Muffin,
Blueberry Streusel, Banana Walnut, Cornbread, Toast, Buttermilk Biscuit, Plain or Onion Bagel.

PLEASE NOTE: 24-hr cancellation required to avoid being charged for meals.

No-shows will be charged for their meal.

Please make checks payable to "ACLSA".

Please submit your reservation and meal choice to

Carolina Martinez as soon as possible

RSVP Deadline: No later than Friday, March 14th at ramos_caro@yahoo.com

You can earn 1.0 hr. MCLE/ CCLS credit given for attending this event. The event is a helpful refresher for those in your association who are studying for the CCLS exam or taking it in the near future.

MCLE/ CCLS: Alameda County Legal Secretaries Association, 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 1 hour.

**LEGAL SECRETARIES, INCORPORATED
MEMBERSHIP LIST AS OF 01/31/14**

Total Members (Fiscal Year-end 4/30/13)	Association		New Members	Transfer Members	Continuing Members	Total Members
41	Alameda County	LSA	7		35	42
0	Antelope Valley	LSA	1		5	5
47	Beverly Hills/Century City	LSA	2		39	41
12	Butte County	LPA	1		14	15
15	Conejo Valley	LPA	3		14	17
25	Desert Palm	LPA	2		13	15
13	El Dorado County	LPA	4		8	12
81	Fresno County	LPA	28		43	71
38	Humboldt County	LPA	8		31	37
32	Imperial County	LPA	18		15	31
38	Livermore-Amador Valley	LPA	3	-1	32	34
68	Long Beach	LPA	10		45	55
56	Los Angeles	LSA	13		44	57
24	Mann County	LPA	4		16	20
48	Merced County	LPA	3		35	38
0	Monterey County	LSA	0		0	0
64	Mt. Diablo	LPA	10	1	48	59
12	Napa County	LSA	1		12	13
87	Orange County	LSA	21		58	77
0	Palo Alto	LSA	0		0	0
23	Placer County	LPA	8		17	23
4	Redding	LPA	0		0	0
18	Rio Hondo District	LPA	5		13	18
26	Riverside	LPA	3		16	19
162	Sacramento	LSA	39		107	148
234	San Diego	LSA	44		157	201
52	San Fernando Valley	LSA	7		48	53
61	San Francisco	LPA	25		45	70
45	San Gabriel Valley	LSA	7		25	32
78	San Mateo County	LSA	13		59	72
24	Santa Barbara	LPA	8		18	24
108	Santa Clara County	LSA	23		58	81
8	Santa Cruz County	LPA	0		6	6
18	Santa Maria	LPA	10		10	20
40	Sonoma County	LSA	4		26	30
11	Southern Butte	LSA	0		7	7
39	Stanislaus County	LPA	0		35	35
38	Stockton-San Joaquin	LPA	2		25	27
4	Trinity County	LSA	0		4	4
22	Ventura County	LPA	7		16	23
47	Members at Large					41
1733	YTD TOTALS					1572

MEMBERSHIP LIST 3rd Quarter 01-31-14.xls

2013-2014 Committee Chairmen

SLSA Officer & Chair Positions 2013-2014

Position	Name	Contact Info
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