



The Legal Eagle

Sacramento Legal Secretaries Association

Book 2014, Issue 9
September 2014



Mary Burroughs, Lynne Koroush, CCLS, and B.J. Susich, Esq.

In this Issue

LSI Quarterly Conference Report

Boss of the Year/Legal Professional of the Year

SCBA Bench Bar Reception

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September Meeting Information

Don't miss out on our next regular dinner meeting! The speaker for the evening will be the Honorable David I. Brown. Judge Brown will be speaking to us on two topics - "Dos and Don'ts for Young (and Old) Lawyers: What Lawyers and Staff Need to Know" and "Sealing Documents Under the California Rules of Court."

The dinner meeting will be on September 18, 2014, at the Downtown Courtyard Marriott, 4422 Y Street, Sacramento, CA. Meet and Greet at 5:30 p.m. Dinner Meeting at 6:15 p.m.

President

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President's Message: "Merci Beaucoup!"

Submitted by Lynne Koroush, CCLS

Did the "good times roll" at LSI's First Quarterly Conference last month in Sacramento, or what?! Wow! What an amazing conference! Everything - from the kick-off of Conference with the crowning of our two Queens of Mardis Gras (Conference Chairs Astrid Watterson, CCLS, and Dawn Forgeur, CCLS), to the outstanding educational workshops, to the successful completion of a very full agenda at the Board of Governors' meeting, to the fabulous lunches, to the colorful decorations, to the Big Easy jazz music, to the gorgeous masked affair at banquet, to the incredible guest speakers, to the magnanimous vendors, to the snazzy boodle bags, to the generous raffle prizes, to the excellent accommodations and service at Embassy Suites Riverfront Promenade, to the gorgeous weather, to the New Orleans-style brunch and inspirational message that brought the Conference to its conclusion – absolutely everything was perfect.

I could not be more proud of Sacramento LSA and the phenomenal job the Conference Committee did in putting on a most enjoyable, memorable Quarterly Conference. LSI President Mary Beaudrow, CCLS, expressed her appreciation to the Conference Committee several times over the course of the weekend, stating that she was very pleased that Sacramento LSA was the host for her first conference as LSI President, how much she enjoyed the conference, and what a wonderful job the Conference Committee did putting everything together.

Such a successful event doesn't happen without the hard work, attention to detail, and commitment of a great group of volunteers and outstanding leaders. The expression "thank you" just doesn't seem completely adequate sometimes, especially when so much was given and done by so many, so selflessly. Nevertheless, I ask you to join me in a heartfelt thank you to:

Astrid Watterson, CCLS
Alex Cain
Deseree Gamayo
Rebecca Lerma
Crystal Rivera

Dawn Forgeur, CCLS
Anne French
Elizabeth Gideon, CCLS
Jaymie Morales
Heather Rodriguez, CCLS

A big thank you, also, goes out to all the SLSA members who offered their help and stepped in when needed over the weekend. Thank you to the many members of SLSA who attended Conference and served as additional ambassadors for SLSA. Thank you to the management and sales and catering staff at Embassy Suites for being such a pleasure to work with, for being so responsive to our needs, and providing a great experience to all our guests. Last, and certainly not least, thank you to our vendor partners, raffle prize donors, law firm sponsors, student volunteers, and sister associations for their generosity and assistance to SLSA in presenting LSI's First Quarterly Conference.

SLSA - - stand up and take a well-deserved bow! *Merci beaucoup, mes amis!*

--Lynne



Sacramento Legal Secretaries Association



Dinner Meeting - September 18, 2014

**Courtyard Marriott
4422 Y Street - Sacramento**

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



Guest Speaker: The Honorable David I. Brown

Judge, Law & Motion Department
Sacramento County Superior Court



“Dos and Don’ts for Young (and Old) Lawyers:
What Lawyers and Staff Need to Know” and
“Sealing Documents Under the California Rules of Court”

MCLE & CCLS Credit: Sacramento Legal Secretaries Association is a local association of Legal Secretaries, Incorporated, an approved provider, and certifies that this activity has been approved for minimum continuing legal education credit in the amount of **0.50 hours** by the State Bar of California.

RSVP by Noon on Friday, Sept. 12 *

Two Ways to Register:

- Online at www.slsa.org under Upcoming Events (Preferred)
- Via e-mail at reservations@slsa.org (please include menu choice)

\$25 SLSA Members / \$30 Non-Members
Add \$5 after deadline

Make checks payable to SLSA and mail to:

Paula Lockard, CCLS
Registration/Reception Chair 2014-2015
c/o Sacramento City Attorney's Office
915 "I" Street, 4th Floor
Sacramento, CA 95814

Dinner Menu – Choice of:

- Herb Marinated Baked Tilapia with Rice Pilaf and Seasoned Vegetables – Dressed with Greek Vinaigrette.
- Penne Pasta with Fresh Tomato Compote and Italian Roasted Vegetables.

Entrees include green salad and choice of Starbucks Coffee, Tazo Tea, and water service.

VENDOR OF THE MONTH:

Capitol Legal Investigations

**Cancellations must be received 48 hours in advance for a refund. No-Shows will be billed.*

“Understanding Audit Response Letters – Why Accountants Are Asking and How to Respond”



Submitted By Elizabeth Madden, CCLS

Our speaker for the August 21, 2014 dinner meeting was B.J. Susich, Esq., of Boutin Jones, Inc., and President of the Sacramento County Bar Association. For those of you who missed this meeting, you missed a superb speaker, and you missed a lot! Not only did we learn the attorney’s responsibility in responding to audit letters, we also learned what to be aware of when purchasing eggs in other countries. Right now you are probably thinking, “I’m glad I missed that. What does buying eggs have to do with audit letters?” I was confused at first, too. However, Mr. Susich’s analogy was informative on many levels.

Auditing is basically a type of attestation service that creates credibility regarding a business’s financials. Auditing allows a better educated decision to be made when investing. Investing is like buying eggs.

In this country, buying eggs is a low-risk process. One goes to the store, picks up a carton of eggs, and one knows the eggs will be clean, white, uniform in shape and size, and relatively fresh. The buyer trusts that the eggs have been inspected and meet certain standards.

In other countries, eggs are sold on the street in an open market and are usually displayed in a basket. The buyer cannot trust anything about the egg, except that it is an egg. Most markets will have a bucket of water close by. Did you know that air seeps into the egg as days pass? That’s why a buyer will place the egg in a bucket of water. If the egg floats, it’s not fresh. If it sinks, it’s fresh.

An audited business has been inspected and meets certain standards. There is no “bucket test” for a business that hasn’t been audited. Auditing adds credibility to a business’s bottom line. Auditing is performed by independent evaluators, mainly CPAs. The evaluators are regulated and are required to follow uniform auditing standards. They also ensure the business is in compliance with uniform rules, i.e., Generally Accepted Accounting Standards. However, audits only provide “reasonable assurance” of the accuracy of financial statements.

We should all know the accounting equation: Assets = Liability + Equity. Well, assets = stuff. The legal

translation is property = property rights. A lawsuit is considered a “contingent liability.” A contingent liability, or ongoing lawsuit, is a potential obligation that depends on a future event arising out of a past transaction or event. Should a lawsuit be recorded as a liability on the books? That depends on the response to a couple of questions. What is the chance the business will lose in court: remote, reasonably possible, or probable? Can the amount be estimated?

If the answer to the first question is “remote,” then the liability need not be on the books. If the answer is “reasonably possible,” then the matter should be disclosed in the notes to the financials. If the answer is “probable” and the amount cannot be estimated, disclose the matter in the notes to the financials. If the answer is “probable” and the amount can be estimated, record the lawsuit as a normal liability.

Auditors and attorneys have been at odds as to how much information needs to be disclosed in the financials. Auditors want to disclose as much as possible. Attorneys do not, as the disclosures may inform the other parties involved. Unlike attorney-client privilege, there is no accountant-client privilege. And, if the attorney discloses information to a third party, such as the accountant, the attorney-client privilege is waived. In March of 1975, the AICPA enacted FAS 5: Accounting for Contingencies. In December of 1975, the ABA enacted “Statement of Policy Regarding Lawyers’ Responses to Auditors’ Requests for Information.” And, in January of 1976, the AICPA enacted SAS 12: Inquiry of a Client’s Lawyer Concerning Litigation, Claims and Assessments.”

The ABA Statement of Policy limits the attorney’s obligation to respond to the audit letter: substantive attention requirement, materiality requirement, and loss contingency requirement.

Substantive Attention: The attorney may limit response to his/her response to matters given substantive attention. The response is limited to professional engagement as counsel. And, the attorney may limit the response to lawyers presently at the firm.

Materiality: Refers to individually or collectively material, and typically manifests itself in a dollar amount stated in the audit letter. Information is considered material if it is likely to impact the decisions of financial statement users.

Loss Contingency: An existing condition, situation or set of circumstances involving uncertainty as to possible loss to an enterprise that will ultimately be resolved when one or more events occur or fail to occur. If there is overtly threatened or pending litigation, the attorney may comment without checking with the client first even if the client does not properly request this information in the inquiry letter. The attorney should not comment on this type of litigation if litigation or settlement payout is remote. Regarding contractually assumed liabilities or unasserted claims, the attorney is required to consult with the client prior to disclosing the information. The attorney should only comment if instructed by the client.

Auditors must assume that the attorney has formed a professional opinion that the client must disclose regarding a matter involving an unasserted possible claim. Once the attorney has advised the client, it is up to the client whether or not to disclose the matter. If the client chooses not to disclose the matter, the attorney may be forced to withdraw.

When a disclosure is being made, the attorney must identify the proceedings, the stage of the proceedings, the claim(s) being asserted, and the position taken by the client. The attorney need not express his/her judgment on the outcome of the matter unless the outcome is either probable or remote. If the attorney is asked to estimate the amount of possible loss, the attorney should state that amount in a range.

When the attorney makes a disclosure that includes confidences or secrets, the attorney **MUST** discuss the matter with the client and advise the client of all legal consequences. It is probably best to review the attorney's response with the client in all situations.

Mr. Susich concluded with the seven biggest traps that attorneys fall into when responding to an audit inquiry:

1. Providing information about contractually assumed obligations or unasserted claims when the client has not specifically identified the matter in the inquiry letter.
2. Commenting on unasserted claims that are not probable of being brought, or do not have a reasonable possibility of an unfavorable outcome.
3. Saying too much in the response, and thereby needlessly exposing a confidence or secret.

4. Not expressing an opinion of outcome when there is a basis for concluding the likelihood of loss is probable or remote.
5. Not advising client of their duty to disclose an unasserted claim or assessment.
6. Not discussing the response with the client where a confidence or secret will be discussed in the response, or an evaluation of a claim will be given.
7. Dismissing matters that may be collectively "material."

I think most of us would agree that the subject of audit letters, at least at first glance, appears rather dry. However, Mr. Susich did a wonderful job of presenting this topic in such a way as to make it extremely interesting. Those who attended will likely see audit letters and prepare the responses to them differently, and as something more than just a "routine" task. SLSA is very grateful to Mr. Susich for sharing his expertise and time with us.



B.J. Susich, Esq., of
Boutin Jones, Inc., and
President of the
Sacramento County
Bar Association

LSI's First Quarterly Conference August 15-17, 2014



Submitted By Dawn Forgeur, CCLS, and Astrid Watterson, CCLS

On August 15-17, 2014, Sacramento LSA had the privilege of hosting Legal Secretaries, Inc.'s August 2014 Quarterly Conference. We had over 130 registrants and visitors throughout California attend and 20 vendors who spent the weekend with us. It certainly was a busy weekend for everyone involved, especially for the SLSA working crew.

The theme for the weekend was "Let the Good Times Roll!" with a Mardi Gras twist. While we may have begun the conference event with a lot of business and educational opportunities, we certainly were able to throw in a few items of fun. Friday night, we had live music from John Cocuzzi and his wife. They performed a perfect blend of jazz music, while attendees enjoyed the baked potato bar and complimentary drinks from the Embassy Suites hotel.

Saturday was the busiest day of the entire conference, as there were many classes, meetings, and opportunities to visit our many exhibitors. However, on Saturday evening, our guests came dressed up with all kinds of sparkling beautiful outfits ... and masks! All guests were treated to a sort of masquerade dinner evening. The decorations from the decorations committee (Rebecca Lerma and Anne French) were inspirational! We have a few truly talented people in our association. That evening, during dinner, we were fortunate to have Rebekah Ruiz and her band serenade us with wonderful music and great songs. The mood was just right for the guests.

Sunday, we ended with a bang! Our guest of honor was none other than Deena Fawcett, Clerk of the Court of the Third District Court of Appeal. She was tasked to provide us with an inspirational speech - and we can tell you, she delivered!

Overall, the August 2014 LSI Quarterly Conference was full of business, but was entertaining, and provided our guests with many different opportunities to learn, advance, and grow. We have received many compliments on how much fun our guests had and how easy things seem to have been run.

Of course we love to hear this, but none of it would have been possible without a great team. Dawn Forgeur, CCLS and I had agreed to be co-chairs in hosting this event nearly three years ago. It was a lot easier to agree to volunteer *three years* ago. Personally, I did not expect to be 8-months pregnant at the time - surprise! (The timing, not the baby.) Thankfully, we have all become accustomed to how successful SLSA is and knowing that we have great members and volunteers, but to be able to show it to all of the other chapters, was truly special. So, to wrap up this summary, let us thank the working crew that created a magical ambiance for all of the other legal professionals who attended conference in August:

**Alex Cain
Anne French
Deseree Gamayo
Elizabeth Gideon, CCLS
Rebecca Lerma
Jaymie Moralez
Maryanna Rickner
Crystal Rivera
Heather Rodriguez, CCLS
Mary Taylor
Dawn Willis**

Thank you to our student volunteers:

**Amber Olson
Alexis Watterson
Emily Watterson**

It was our pleasure to coordinate another successful conference for Legal Secretaries, Inc. on behalf of the Sacramento Legal Secretaries Association.



LSI's First Quarterly Conference Sacramento, CA, August 15-17, 2014



Centerpiece on Banquet Tables



Crystal Rivera and Maryanna Rickner



Dawn Forgeur, CCLS



Johnny Bateman and Anne French



Don Lee



Jazz Band at Banquet



Litigation Services



Opportunity Table



Dawn Forgeur, CCLS



Crystal Rivera



Johnny Bateman, Anne French, and Ignacio Solorio



LSI's Continuing Education Council

LSI's First Quarterly Conference
Sacramento, CA, August 15-17, 2014



LSI President,
Mary Beaudrow, CCLS



Emily Watterson, Astrid Watterson, CCLS, and
Alexis Watterson



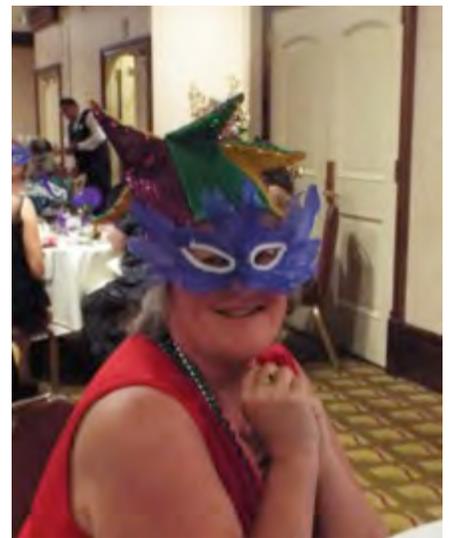
Mardi Gras Bead Contestants



Crystal Rivera and Tammy Hunt, CCLS



Astrid Watterson, CCLS, and Sandra Jimenez, CCLS



Banquet Attendee

LSI's First Quarterly Conference Sacramento, CA, August 15-17, 2014



SLSA Banquet Attendees



LSI Banquet Attendees



Banquet Attendee



Deena Fawcett



3rd District Court of Appeal
Speakers and Barbara Barregar



Don Lee



Anne French and Rebecca Lerma



Dawn Forgeur, CCLS, and
Jennifer Rouse



Lynne Koroush, CCLS



Heather Rodriguez, CCLS, and
Lacy Monserrat

LSI's First Quarterly Conference Sacramento, CA, August 15-17, 2014



Friday Night Reception



LSI's Executive Committee



Lynne Koroush, CCLS,
Dawn Forgeur, CCLS, and Anne French



Liz Gideon, CCLS, and
Anne French



Instagram Booth!

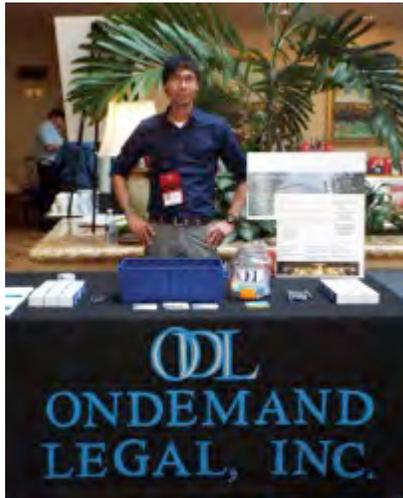


Jazz Band at Friday Night
Reception

LSI's First Quarterly Conference Sacramento, CA, August 15-17, 2014



DeMichelle Huseby



On Demand Legal, Inc.



Capitol Digital Document Solutions



Pampered Chef



Pacific Legal



Litigation Services

LSI's First LSI Quarterly Conference Sacramento, CA, August 15-17, 2014

Submitted by Alex Cain

THANK YOU Vendors! We had 20 vendors participate at our LSI August Quarterly Conference. We had a great turnout and the event was another success! We were pleased to see some more new vendors. Again, we hope both vendors and attendees were able to make some new contacts. Please continue to support our vendors.

Beadazzled
Vicky Young

Behmke Reporting
David Perry

Capitol Legal Investigations
Luke Patterson

Cookie Lee
Judy Barsuglia

DeMichelle Huseby
Shanna DeMichelle

First Legal
Jim Pinter

OnDemand Legal
Andrew Gilbert

Pacific Records Management
Richard Steed

Sacramento Legal Video Center
Sean McAleer

Trinity Legal eSolutions
Brian Saelee

BeautiControl
Karen Bommarito

Capitol Digital Document Solutions
David Wilkinson
Ron Bodenmann

Carol's Collection Jewelry
Carol Covacs

Glass Designs by Nancy
Nancy Bukard

Esquire Deposition Solutions
Johnny Bateman

Litigation Services
Morgan Albanese

One Legal
Lili Daniel

Pampered Chef
Robin Grossman

US Legal Support
Jenoa Derdowski

Zoom Imaging
Steve Borba

Thank you again for supporting SLSA!





LSI

*Educating California's
Legal Support Professionals*

The Continuing Education Council

PROUDLY PRESENTS

INDIAN REAL PROPERTY LEASES AND SALES ON THE AGUA CALIENTE INDIAN RESERVATION

HISTORY OF INDIAN REAL PROPERTY DEVELOPMENT, ROLE OF BUREAU OF INDIAN AFFAIRS
AND CURRENT ISSUES



CHRISTOFFER THOMSEN, ESQ.

Partner at Schlecht, Shevlin & Shoenberg, A Law Corporation

FRIDAY, NOVEMBER 7, 2014*

5:15 p.m. to 6:15 p.m.

Hilton Palm Springs, 400 East Tahquitz Canyon Way, Palm Springs, CA

Email reservations to: J. Cori Mandy, CCLS
jcmandy5@gmail.com
619-515-3256 or 619-954-3603

*Seminar is free with a paid conference registration

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 1.0 hours.



**PLACER COUNTY LEGAL PROFESSIONALS ASSOCIATION
PRESENTS**

FALL LUNCHEON

AND

BUNCO

SATURDAY, OCTOBER 11, 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**



LEGAL SECRETARIES, INCORPORATED

OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY

LSI will be offering an online class on an Overview of California State Court Discovery. This class will be a six-week, work-at-your-own-pace online session commencing October 20 and ending December 1, 2014. During the classes, the following topics will be covered:

Interrogatories	Demand for Physical Examinations
Demand for Production of Documents	Deposition Subpoenas
Requests for Admissions	Discovery Timelines and Service
Depositions	Verifications

CLASS SESSION OPENS MONDAY, OCTOBER 20, 2014

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

The content of this class is designed for legal secretaries and those studying for the California Certified Legal Secretary examination.

The cost of the class is \$30 for LSI members/\$50 for non-LSI members. Each individual must register separately. Upon completion of the class, students will receive a certificate of completion from LSI.

OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY CLASS REGISTRATION

(Please type or print clearly)

Name: _____ Email: _____

Address: _____ City/Zip: _____

Telephone: _____ Association: _____ LSA/LPA

\$30 LSI Member _____ \$50 Non-LSI Member _____

Payment: Check # _____

Visa/MC Credit Card # _____

Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

Email registration form NO LATER THAN October 13, 2014, to Shaylene Cortez, CCLS, LSI Legal Secretarial Training/Seminar Chair, training@lsi.org or mail to: LSI, P. O. Box 660, Fortuna, CA 95540-0660. Checks should be made payable to LSI (Note: checks must clear before access will be released). Registration will also be offered online at www.lsi.org with PayPal. For further information or inquiries, email training@lsi.org. No refunds after October 20, 2014.

LSI – Educating California’s Legal Professionals

RAPID LEGAL®

an online attorney service



OUR JOB IS TO MAKE YOU LOOK GOOD.

As an attorney service, we understand the pressure and deadlines legal support professionals face everyday. Timely and accurate court filing, eFiling and process serving are critical to preventing costly delays and jeopardized cases. That's why, at Rapid Legal, our job is to ensure we make legal support professionals look good by executing their orders on time and without error—every time.

What's more, Rapid Legal is an online attorney service that's on the cutting edge of electronic filing and serving. Our secure portal allows customers to quickly and easily manage cases, place orders, upload documents, view job statuses, and retrieve conformed copies, proofs of service and more. So what are you waiting for? Try us for your court filing, electronic filing and process serving needs. You'll be happy you did!



Ready to let us make you look good? Simply go to rapidlegal.com/LSI and create an account. Then log into our secure portal and place your order within minutes. We'll send you regular status updates until your order is completed. It's that simple.

www.rapidlegal.com/LSI | info@rapidlegal.com | (800) 366-5445



Submitted By Crystal Rivera

Welcome, and congratulations to the following new SLSA members who were inducted at the August 21, 2014 meeting.

ACTIVE MEMBERSHIP

Sharon Silva – Sharon is a legal secretary at Kershaw Cutter & Ratinoff, and has been employed as a legal professional since 2003. She specializes in litigation. She celebrates her birthday on October 16, and she enjoys reading and outdoor/water sports.

Casie Campbell – Casie is a legal assistant at Goyette & Associates, Inc., and has been employed as a legal professional since 1992. She specializes in family law. She celebrates her birthday on April 3. She is a feature writer for *The Territorial Dispatch* in Marysville.



Crystal Rivera and Jade Godey

STUDENT MEMBERSHIP

Brenda J. Orr – Brenda is attending the paralegal program at Heald College. She celebrates her birthday on February 19, and her interests are history and animal welfare, and she enjoys reading.

ASSOCIATE MEMBERSHIP

Jade Godey – Jade is interested in the legal profession and possesses no legal experience.



Lynne Koroush, CCLS, Alex Cain, and Jade Godey

If you are interested in membership in SLSA, please contact Vice President Crystal Rivera at (916) 469-3813, or via e-mail at crivera@somachlaw.com.

Birthdays

We wish the following SLSA members a Happy Birthday!

Betty Henkle	September 2	Coty Lutz	September 4
Kate Moore	September 7	Dawn Willis	September 11
Tiffany Meier	September 13	Michelle Griswold	September 16
Dawn Forgeur, CCLS	September 17	Sherri Lee Caplette, CCLS	September 20
Sally Day	September 23	Lynne Koroush, CCLS	September 24
Lacy Monserrat	September 25	Shelly Reyes	September 26
Jennifer Sullivan	September 27	Corene Rodder	September 28
Patricia Seaton	September 29	Ana Marie Sotuela	September 29



SLSA Event Registrations Going Paperless!

Important! SLSA's registration process for dinner meetings, lunch lessons, and other SLSA events is going paperless! You have two ways to register – online (preferred method) or via e-mail. There will no longer be a “tear-off-and-mail” form for most of our events. Simply register online (or via e-mail), then follow-up with payment.

Remember – REGISTER ONLINE, THEN FOLLOW-UP WITH PAYMENT!

Thanks for helping us streamline our registration process!

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 Vice President Crystal Rivera at crivera@somachlaw.com.



**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? Business Home
- Where do you want e-mail delivered? Business Home

Please submit to:

**Attn: Crystal Rivera
SLSA Vice President 2014-2015
c/o Somach Simmons & Dunn
500 Capitol Mall, Suite 1000
Sacramento, CA 95814
E-mail: vicepresident@slsa.org**



ST. JOHN'S HALLOWEEN COSTUME DRIVE AND PARTY

SLSA'S OCTOBER CHARITABLE PROJECT

St. John's Program for Real Change is a nonprofit organization in Sacramento which provides shelter and food to women and their children, and helps women transform their lives through a unique program consisting of mental health services, GED attainment, and on-the-job training. All the while, their children also receive emotional and developmental support through St. John's Children's Program.

SLSA will be hosting a costume drive and Halloween party to give these kids a fun and memorable experience during what can be an awkward and challenging experience in their lives.

WHEN: Tuesday, October 28, 2013, from 6:00 - 8:00 pm

WHERE: St. John's - Main Facility, 8401 Jackson Rd., Sacramento

SLSA's sponsorship guarantees the costumes, cupcakes, beverages, decorations, entertainment, and trick-or-treat bags.

WHAT WE NEED

- Your help in purchasing or donating new costumes suitable for a boy or girl for ages newborn to 17 for approximately 60 children.
- Your help in purchasing or donating trick-or-treat bags for approximately 60 children.
- Ideas for entertainment - quick craft project, magic show, game(s), etc.
- Volunteers to help set up for the party, help run the party, and help clean up.

If you are interested in joining us for the party, donating costumes, or have any questions, please contact Connie Kelley at kellyco@gtlaw.com or (916) 868-0761. If you wish to volunteer at the party, you must **RSVP** to Connie Kelley by October 1, 2014, and be fingerprinted through the Department of Justice (details to be provided to those who RSVP.) No drop-ins, please.

Your Charitable Projects Committee THANKS YOU!

Rebecca Lerma

Coty Lutz

Connie Kelley



**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:

Crystal Rivera, Vice President
Sacramento Legal Secretaries Association
c/o Somach Simmons & Dunn
500 Capitol Mall, Suite 1000, Sacramento, CA 95814

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:

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

EDUCATION:

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

TYPE OF OFFICE:

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

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

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

CHECK HERE IF YOUR EMPLOYER PAYS FOR YOUR MEMBERSHIP DUES

CHECK HERE IF YOUR EMPLOYER PAYS FOR MONTHLY DINNER MEETINGS

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

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:

Crystal Rivera, Vice President
Sacramento Legal Secretaries Association
c/o Somach Simmons & Dunn
500 Capitol Mall, Suite 1000
Sacramento, CA 95814



**Sacramento Legal Secretaries Association
Membership Renewal Invoice**

Membership Period: May 1, 2014 – April 30, 2015

Due Date: May 1, 2014

Make check payable to:
Sacramento Legal Secretaries Association

Amount Due: \$40
Renewals are due May 1, 2014
There will be a late fee of \$5 after June 1, 2014

Return the completed invoice and full payment to:

**Elizabeth Madden, CCLS
SLSA Treasurer
5916 Camray Circle
Carmichael, CA 95608**

MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

NAME: _____

ARE YOU A CCLS? _____

BIRTHDAY: _____

JOB 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

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: _____



BBQ



THE MERCED COUNTY
LEGAL PROFESSIONALS ASSOCIATION

PRESENTS ITS
ANNUAL FUNDRAISER

SATURDAY, SEPTEMBER 27, 2014 6-9P.M.

ELKS PARK - 3600 WARDROBE AVE, MERCED

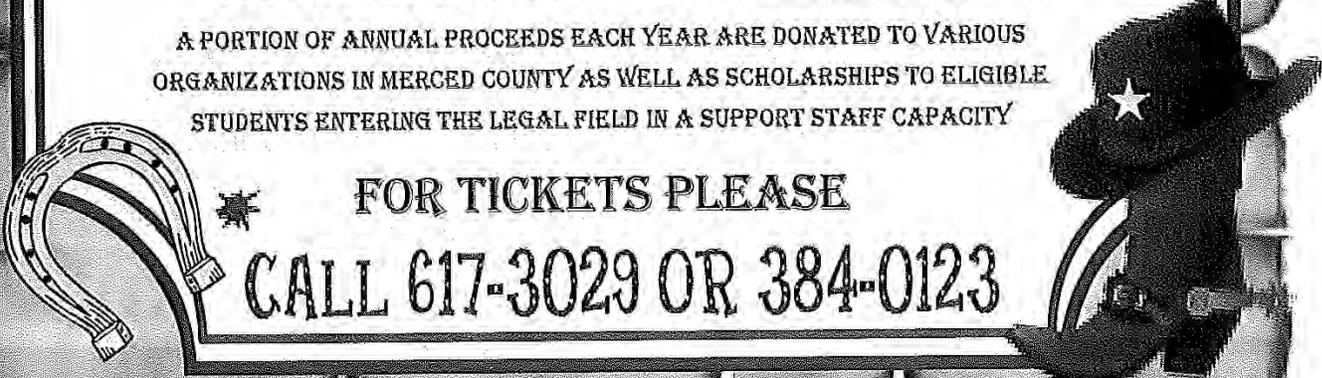
COME OUT AND ENJOY SOME FAMILY FUN

SILENT AUCTION - RAFFLE - CELEBRITY DESSERT AUCTION

DONATION - \$15.00 ADULT/\$10.00 CHILD (UNDER 10YRS.)

TRI-TIP - SHORT RIBS - BEANS - SALAD - ROLLS

A PORTION OF ANNUAL PROCEEDS EACH YEAR ARE DONATED TO VARIOUS
ORGANIZATIONS IN MERCED COUNTY AS WELL AS SCHOLARSHIPS TO ELIGIBLE
STUDENTS ENTERING THE LEGAL FIELD IN A SUPPORT STAFF CAPACITY



FOR TICKETS PLEASE

CALL 617-3029 OR 384-0123



**The Sacramento County Bar Association
Annual Bench-Bar Reception**

Honoring Justice Vance Raye as Judge of the Year

Appetizers • Hosted Bar • Jazz Combo

Wednesday, October 1, 2014
Reception 6 to 9 pm
Program from 7 to 7:30 pm

Tsakopoulos Library Galleria, 828 "I" Street, Sacramento, CA 95814

Individual Ticket Registration Form

Individual Tickets: \$30 Member \$50 Non-Member \$20 Court Staff/Law Students
 AFTER September 17th, all ticket prices increase by \$5

You may pay by credit card or make checks payable to Sacramento County Bar Association.

Please mail, fax or email this form to: Sacramento County Bar Association, 1329 Howe Ave., Suite 100, Sacramento, CA 95825 • Phone (916) 564-3780 • Fax (916) 564-3787 • Email: reception@sacbar.org

FIRST NAME: _____ LAST NAME: _____

ADDRESS: _____ PHONE: _____

CITY: _____ STATE: _____ ZIP: _____

EMAIL: _____ CHECK AMOUNT: \$ _____

CREDIT CARD NUMBER: _____ - _____ - _____ - _____ AMOUNT: \$ _____

EXPIRATION DATE: ____ - ____ MASTER CARD: ____ VISA: ____ CVR CODE NUMBER: ____

SIGNATURE: _____

If you are purchasing multiple tickets, please provide your guest's name below:

GUEST NAME: _____ GUEST NAME: _____

GUEST NAME: _____ GUEST NAME: _____

ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION
Membership Meeting

ANNUAL HOLIDAY EVENT

★ SALUTE TO ACLSA PAST PRESIDENTS ★

Date & Time

Tuesday, December 2, 2014
6 p.m.

Location

Buttercup Grill
229 Broadway, Oakland

White Elephant Gift Exchange

If you wish to participate, bring an
anonymously wrapped gift to exchange
(\$15 limit)



Cookie Exchange

If you wish to participate, bring 2 dozen of
your favorite home-baked holiday cookies
and containers to take back a mixed batch of
holiday cookies



Entrée Options:

- 1) **Prime Rib** – A generous 8 oz slice of the King of beef slowly roasted to perfection. Served with creamed horseradish, garlic mashed potatoes and creamed spinach. Served with your choice of dinner salad (*specify dressing*), or soup.
- 2) **Top Sirloin Steak** – 10 ounces of center cut USDA choice top sirloin crowned with onion straws and served with fresh vegetable and your choice of dinner salad (*specify dressing*), soup or baked potato.
- 3) **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 your choice of dinner salad (*specify dressing*), soup or baked potato.
- 4) **BBQ Baby Back Ribs** – Tender juicy pork ribs cooked with our own house made barbecue sauce, served with black beans. Served with your choice of dinner salad (*specify dressing*), soup, reg. curly fries or baked potato.

COST

\$25 per person

PLEASE NOTE: 24-hr cancellation of reservation 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 to Judy A. Martinez as soon as possible,
but no later than Monday, December 1, 2014, at jmh1561@aol.com

September 2014	
September 1	Happy Labor Day! All Courts closed. No U.S. Mail service.
September 8	SLSA Executive Board Meeting, 6:00 p.m., Carroll, Burdick & McDonough LLP, 980 9th Street, Suite 380, Sacramento, CA 92514. All members welcome.
September 15	LSI's Online Class: Beginning Legal Secretarial Training Class begins
September 18	SLSA Monthly Membership Meeting, 5:30 p.m. Meet & Greet, 6:15 p.m. Dinner Meeting. Courtyard Marriott, 4422 Y Street, Sacramento, CA 95817.
September 19	San Diego and Imperial Counties Inter-Association Event in Las Vegas!
September 22	Deadline to submit bulletin article to the Editor for the October issue of <i>The Legal Eagle</i> .
September 27	Santa Clara Legal Professionals Association presents Probate from A to Z for Legal Professionals.
October 2014	
October 1	The Sacramento County Bar Association Annual Bench-Bar Reception honoring Judge of the Year.
October 8	SLSA Executive Board Meeting, 6:00 p.m., Carroll, Burdick & McDonough LLP, 980 9th Street, Suite 380, Sacramento, CA 92514. All members welcome.
October 11	Placer County Legal Professionals' Fall Luncheon and Bunco event.
October 13	Columbus Day. All Courts closed. No Mail service.
October 15	Last day to email your essay for the 2014-2015 Legal Professional and Boss of the Year Contests.
October 16	SLSA Monthly Membership Meeting, 5:30 p.m. Meet & Greet, 6:15 p.m. Dinner Meeting. Courtyard Marriott, 4422 Y Street, Sacramento, CA 95817.
October 20	Deadline to submit bulletin article to the Editor for the November issue of <i>The Legal Eagle</i> .
October 24-26	Fairytale Town - Safe and Super Halloween
October 28	SLSA's October Charitable Project – St. John's Halloween Costume Drive and Party.
October 31	Happy Halloween! Trick or Treat!





Submitted By Liz Gideon, CCLS

Each row of words contains one **misspelled word**. Indicate under which column it appears:

- | | | | | | |
|----|-------|--------------|------------------|-----------------|-----------------|
| 1 | _____ | A. totaled | B. temperament | C. consientious | D. surveillance |
| 2 | _____ | A. hypocrisy | B. indispensable | C. innocuous | D. preemptions |
| 3 | _____ | A. anomalous | B. eyeing | C. entrepreneur | D. lieutenant |
| 4 | _____ | A. basically | B. alleged | C. collateral | D. idiosyncrosy |
| 5 | _____ | A. abeyance | B. grantee | C. temperture | D. frivolous |
| 6 | _____ | A. subrogate | B. tortfeasor | C. passim | D. probible |
| 7 | _____ | A. voidable | B. elimanate | C. skillful | D. forcible |
| 8 | _____ | A. seperate | B. boxy | C. acreage | D. canceled |
| 9 | _____ | A. basicly | B. dairy | C. libel | D. descent |
| 10 | _____ | A. yield | B. advantageous | C. possible | D. sizeable |

Definitions:

- K contract (or "thousand" as used to refer to amounts, e.g. \$30K)
- S.A.S.E. self-addressed, stamped envelope
- P.O.S. proof of service
- Re: Regarding
- v. or vs. versus
- P.I. personal injury
- /s/ signed by (used to conform copies to indicate individual who signed the original document or letter)
- SDT subpoena deces tecum (order for production of documents, records, or other evidence)
- OSC Order to Show Cause
- U/D unlawful detainer

California Certified Legal Secretary

A Program of
Legal Secretaries, Incorporated



APPLICATION

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

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

(Select One)	(Select One)
<input type="checkbox"/> Northern California <input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, October 18, 2014 <input type="checkbox"/> Saturday, March 21, 2015

Deadline: Application must be received 60 days prior to examination date. A late application *may* be accepted up to 30 days prior to the examination if submitted with a \$30 late fee, in addition to the fees listed below, *if space is available*. Deferral requests must be made no later than 2 weeks prior to the exam.

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

Enclosed is a check in the sum of \$ _____ ***, payable to LSI.

* Fees subject to change without notice.
 ** LSI members: Name of local association: _____ LSA/LPA.
Please enclose a photocopy of your local membership card.
 You must be a member upon application to be eligible for reduced fees.
 *** Include \$30 late fee if applicable.

Name: _____ Last 4 Digits of SSN: _____

Mailing Address: _____

City/State/Zip: _____

Day Phone: _____ Evening Phone: _____ Email: _____

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

Dates: _____ Position: _____

Employer: _____

Address: _____

Supervisor: _____ Phone: _____

Summary of Duties: _____

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

Signature of Applicant: _____ Date: _____

Rev. Mar. 2014

Future LSI Quarterly and Annual Conferences

2014	
November 7–9, 2014	
LSI Second Quarterly Conference Palm Springs Hilton <i>Host Association: Desert Palm LPA</i>	
2015	
LSI Third Quarterly Conference February 20-22, 2015 Beverly Garland Holiday Inn <i>Host Association: San Fernando Valley LSA</i>	LSI 81st Annual Conference May 14-17, 2015 Bahia Resort <i>Host Association: San Diego LSA</i>
LSI First Quarterly Conference August 21-23, 2015 Stockton Hilton <i>Host Association: Stockton – San Joaquin County LPA</i>	LSI Second Quarterly Conference November 13-15, 2015 Marriott Hotel, Riverside <i>Host Association: Riverside LPA</i>
2016	
LSI Third Quarterly Conference February 26-28, 2016 Tenaya Lodge, Fish Camp <i>Host Association: Merced County LPA</i>	LSI 82nd Annual Conference May 19-22, 2016 Embassy Suites Hotel, San Rafael <i>Host Associations: Marin County, LPA/San Francisco LPA</i>





**Desert Palm Legal Professionals Association
Invites you to join us for a**

Masquerade Ball

NOVEMBER 7 – 9, 2014 - Hilton Palm Springs

CONFERENCE REGISTRATION FORM

Name (as it will appear on badge): _____
 Association Name: _____
 Mailing Address: _____ City: _____ State: _____ Zip: _____
 Contact #: (H): _____ (W): _____ (C): _____ (E): _____

Please Check if Applicable and Include Title:

LSI Officer
 LSI Chairperson

Please Check if You Are:

Governor
 CCLS
 PLS

SCRIP TICKET (Price includes: Registration, Reception, Ball and Brunch):

POSTMARKED ON OR BEFORE **OCTOBER 3, 2014**..... @ \$125.00 \$ _____
 POSTMARKED AFTER **OCTOBER 3, 2014** @ \$135.00 \$ _____

INDIVIDUAL TICKETS:

Registration by October 3, 2014	_____ @ \$ 15.00	\$ _____
Registration after October 3, 2014	_____ @ \$ 25.00	\$ _____
Welcome Reception (Friday)	_____ @ \$ 20.00	\$ _____
President’s Luncheon (Saturday)	_____ @ \$ 28.00	\$ _____
Governor’s Luncheon (Saturday)	_____ @ \$ 28.00	\$ _____
Open Luncheon (Saturday - Open to All)	_____ @ \$ 28.00	\$ _____
Luncheon: Chicken Salad w/ Cashews on Croissant _____ Veggie _____		
Masquerade Ball (Saturday Night)	_____ @ \$ 66.00	\$ _____
Dinner: Beef _____ Chicken _____ Veggie _____		
Brunch (Sunday)	_____ @ \$ 30.00	\$ _____
	TOTAL AMOUNT	\$ _____

Please specify Any Dietary Requests: _____

PLEASE MAKE CHECKS PAYABLE TO: **DPLPA 2014 CONFERENCE**

RETURN THIS FORM WITH PAYMENT TO:

(Reminder: No Refunds After October 17, 2014!)

Registration Co-Chair:

Mary Carter
 c/o SBEMP
 1800 E. Tahquitz Canyon Way
 Palm Springs, CA 92262
 Tel: (760) 322-2275 / Fax: (760) 322-2107 / Email: carter@sbemp.com



Desert Palm Legal Professional Assoc.



DPLPA will be honored with your presence at the LSI Quarterly Conference - **November 7-9, 2014**

HOTEL REGISTRATION

- Single or Double Room Rates \$119 + Tax & Utility User Fee (per night.)
- Resort fee is included in room rate.
(Includes: free airport shuttle, self-parking, high speed internet, local calls, 24hr fitness center, 15% discount on services at Elements Spa and 2-for-1 dinner coupons in the Terrace Rest.);
- Check in 4:00 p.m. & Check out 12:00 p.m. (Contact the hotel for any early arrival/late departure);
- Each **reservation** must be accompanied by a one-night room revenue deposit. Click link below.
http://www.hilton.com/en/hi/groups/personalized/P/PSPPSHF-LGI-20141106/index.jhtml?WT.mc_id=POG

Group Code: LGI

Group Name: Legal Secretaries, Inc. 2014 Fall Conference

Hilton Palm Springs, 400 East Tahquitz Canyon Way, Palm Springs, California, 92262-6605

TEL: (760) 320-6868

[Hilton Palm Springs](#)



Hotel Registration Deadline: October 23, 2014

- Fitness Room
- Pool
- Automated Teller (ATM)
- Baggage Storage
- Clothing Store
- Electric Service
- Elevators
- Gift Shop
- Laundry/Valet Service
- Lounge
- Luggage Hold
- Multi-Lingual Staff
- News Stand
- On-Site Convenience Store
- Room Service
- Safety Deposit Box

REV. 8/2014

September Holidays and Events

1 Labor Day	17 Constitution Day
1-7 International Enthusiasm Week	17-23 Constitution Week
4 Newspaper Carrier Day	18 World Water Monitoring Day
5 Be Late for Something Day	19 International Talk Like a Pirate Day
5 Bring Your Manners to Work Day	20 AKC Responsible Dog Ownership Day
7 Grandma Moses Day	21 International Day of Peace
7 National Grandparents Day	21-27 International Clean Hands Week
7-12 Substitute Teacher Appreciation Week	21-27 World Reflexology Week
8 International Literacy Day	21-28 International Week of the Deaf
8-13 National Line Dance Week	22 First Day of Autumn
9 Wonderful Weirdos Day	22 International Day of Radiant Peace
10 World Suicide Prevention Day	23 Innergize Day
11 Patriot Day	23-30 International Interpreters and Translators Week
13 Kids Take Over the Kitchen Day	24 National Women's Health and Fitness Day
14 National Hug Your Hound Day	25 National One-Hit Wonder Day
15 International Day of Democracy	26 Love Note Day
15-21 Balance Awareness Week	27 Ancestor Appreciation Day
16 International Day for the Preservation of the Ozone Layer	27 World Tourism Day
17 Citizenship Day	28 World Rabies Day
	29 National Attend Your Grandchild's Birth Day

September is also . . .

World Animal Remembrance Month
 International Women's Friendship Month
 AKC Responsible Dog Ownership Month
 Atrial Fibrillation Awareness Month
 Attention Deficit Hyperactivity Disorder Month
 Baby Safety Month
 Backpack Safety America Month



Important: Parking at the Courtyard Marriott

Please be advised that the Courtyard Marriott at 442 Y Street, where SLSA holds its regular monthly meetings, had installed an electronic ticket system for parking. **YOU WILL NOT HAVE TO PAY FOR PARKING.** However you **WILL** need to do the following:

1. Pull a ticket from the automated dispenser upon entering the Courtyard Marriott parking lot.
2. **BRING THE TICKET WITH YOU TO THE MEETING.**
3. Use the validation machine located in the meeting room.



Submitted By Dawn Forgeur, CCLS

L.A. Superior Court Modernizes Telephone System

In September, the Los Angeles Superior Court will begin implementation of a Voice-over-Internet Protocol (VoIP) telephone system. The system debuts at the Inglewood Courthouse and juvenile court building on September 16, 2014, and will become operational at 33 other courthouses during the next 12 months.

The changeover requires almost every courthouse to acquire new telephone equipment and new phone numbers. The exceptions are the Gov. George Deukmejian Courthouse in Long Beach, the Downey Courthouse and the East Los Angeles Courthouse, which are already equipped with updated telephone equipment.

The public can always find courthouse telephone numbers on the Court's website www.lasuperiorcourt.org by reviewing the "Locations" tab under the "About the Court" section. Current automated traffic numbers and the Jury Services toll-free line (1-800-SRV-JURY) remain unchanged and will continue to function throughout the transition.

San Francisco Superior Court's Voluntary Efiling Expands July 14 to Include Nearly All Civil Case Types

Effective July 14, the San Francisco Superior Court expanded its voluntary efile program to include 25 new case types, Presiding Judge Cynthia Ming-mei Lee announced.

Since announcing voluntary expansion of Civil efile in January 2014, the Court has processed nearly 4,000 General Civil efile transactions by 520 unique law firms.

The Court's efile program will include all Civil case types except limited Unlawful Detainer and Small Claims cases. The voluntary efile expansion that took effect July 14 included 25 additional case types [please see the website for a complete list]. Asbestos cases, Probate Trust and Complex Litigation cases are subject to mandatory efile, not voluntary efile. Efile rules are contained in San Francisco Superior Court local rule 2.10.

File & ServeXpress (formerly LexisNexis), which has served and will continue to serve as the Court's efile vendor, also will provide service for the additional voluntary efile of the 25 new case types. File & ServeXpress remains as the agent of the Clerk to collect statutory filing fees. File & ServeXpress provides free training to law firms on the efile system and services as well as free technical support to registered users. More information is available at www.fileandservexpress.com.

The Court has selected One Legal as an additional efile vendor through a competitive process. Questions about One Legal's ability to serve as an efile vendor to the San Francisco Superior Court should be directed to the company.

The Civil efile expansion is a key element of the Court's Electronic Information Management (EIM) project, managed by Civil Administrator Wayne Parinas and Court Managers Pat Kilkenny and Regina Dennis, and overseen by Presiding Judge Lee and Court Executive Officer T. Michael Yuen. The project, which began in March 2013, is aligned to the Court's strategic plan.

Orange County Superior Court Announces an Update to the Civil Court Reporter Pooling Pilot Project

Effective August 25, 2014, the following 14 unlimited civil courtrooms will be participating in a Civil Court Reporter Pooling Pilot Project and official court reporters (i.e., court reporters employed by the Court) will only be provided in the following departments for trials and matters in which oral evidence will be presented:

Dept. C6 Judge Schulte
Dept. C10 Judge Marks
Dept. C12 Judge Wilson
Dept. C13 Judge Gastelum
Dept. C14 Judge Miller
Dept. C15 Judge Nakamura
Dept. C17 Judge Griffin
Dept. C18 Judge Claster
Dept. C21 Judge McEachen
Dept. C23 Judge Aguirre
Dept. C25 Judge Monarch
Dept. C26 Judge Lewis
Dept. C31 Judge Horn
Dept. C32 Judge Glass

Official court reporters will continue to be provided for all hearings in the remaining unlimited civil courtrooms, including civil complex departments.

A Court-Approved List of Official Reporters Pro Tempore (List), which includes names and contact information of reporters who can be privately retained and appointed as an official court reporter pro tempore without stipulation of the parties, will be posted on the Court's website. Alternatively, by stipulation of the parties and appointment by the judge, parties may privately retain a certified shorthand reporter not on the court-approved List to serve in a proceeding as an official court reporter pro tempore where an official court reporter is not available.

All forms, policies, and additional information will be available on the Court's website at www.occourts.org.

**ALAMEDA COUNTY
LEGAL SECRETARIES ASSOCIATION**



**ELECTRONIC FILING at
San Francisco Superior Court**



SPEAKERS: T. Michael Yuen
Court Executive Officer of the
San Francisco Superior Court and
Wayne Parinas, Civil Division E-Filing

SPECIAL GUEST: Mary J. Beaudrow, CCLS
President, Legal Secretaries, Inc.

Date & Time

Tuesday, October 7, 2014
5:30 p.m.

Location

Hanson Bridgett Law Office
425 Market Street, 26th Flr.
San Francisco, CA 94105
(BART Exit: Embarcadero Station
head two blocks northeast on Market Street)



Taco Bar, Desserts and
Drinks will be provided



RESERVATIONS REQUIRED

Please submit your reservation to
Judy A. Martinez as soon as possible

RSVP Deadline: No later than Friday, October 3rd. 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 CCLS/MCLE credit** continuing legal education credit by the State Bar of California and Certified Legal Secretary.*

ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION

Membership Meeting

Employment Law 2014



Speaker: Jeanine DeBacker

McPharlin, Sprinkles & Thomas, LLP

Jeanine DeBacker uses her courtroom experience to help employers prevent lawsuits through well-crafted policies, staff training and informal dispute resolution. Jeanine counsels businesses on human resources, employment and employee benefit issues. Her practice focuses on representing employers in all areas of employment and benefits law, including wage and hour claims, harassment, discrimination, retaliation, wrongful termination, collective bargaining issues, trade secrets and other employment-related claims. She represents both

public and private employers in administrative proceedings, class actions, civil litigation, mediation and arbitrations, and federal and state appeals.

Date & Time

Tuesday, September 9, 2014
6:00 p.m.

Location

Buttercup Grill
229 Broadway, Oakland

Entrée Options:

- 1) **CHICKEN MARSALA** – A boneless breast of chicken topped with a mushroom Marsala sauce, served with garlic mashed potatoes and fresh vegetables. Served with a choice of dinner salad (*please specify dressing*) or cup of soup.
- 2) **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*).
- 3) **FISH AND CHIPS** – Fresh fish lightly battered and fried to a golden brown, with fresh cole-slaw. Served with a choice of regular or curly fries (*please specify*).
- 4) **GRILLED CHICKEN TOSTADA** – A large flour tortilla shell filled with beans, shredded lettuce, jack and cheddar cheese, topped with grilled chicken and garnished with guacamole, sour cream, diced tomatoes and green onions.

- 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, September 5th 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 CCLS /MCLE continuing legal education credit by the State Bar of California and Certified Legal Secretary.

Submitted By Alex Cain

It was a pleasure to have US Legal Support as our August Vendor of the Month. Jenoa Derdowski is their local Account Executive and gave us a great outline of the services her offices provide. I would also like to mention that prior to her extensive experience within litigation services; she was a legal secretary for seven years and has a great understanding of your needs.

US Legal Support provides nationwide services which include court reporting, record retrieval, litigation, ESI, and trial services to major insurance companies, corporations, and law firms nationwide. With their 40 offices across the country, you can be assured of local expertise and excellent services in all aspects of depositions and trials. Their local office also has seven conference facilities, and also offers complimentary breakfast, lunch, and afternoon snacks.

I recommend that you reach out to Jenoa should you need any of the services that US Legal Support provides. She can be reached at:

Jenoa Derdowski
Director of Business Development
US Legal Support
2710 Gateway Oaks Drive, Suite 300-South
Sacramento, CA 95833
Main: (916) 248-5608 Fax: (916) 248-5610



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LEGAL SPECIALIZATION SECTIONS SEMINARS
LSI 2nd Quarterly Conference – November 7-9, 2014 – Palm Springs Hilton
 Hosting Association: Desert Palm LPA

The deadline to register without a late fee is Tuesday, October 28, 2014.

LSI SECTION MEMBER: Free with Advanced Reservations \$5.00 at the Door/After Deadline Handout Only: \$5.00	LSI NON-SECTION MEMBER: \$10.00 with Advanced Reservation \$15.00 at the Door/After Deadline Handout Only: \$10.00	NON-LSI MEMBER: \$15.00 with Advanced Reservation \$20.00 at the Door/After Deadline Handout Only: \$15.00
Friday, November 7, 2014 – 7:30 p.m. to 9:00 p.m.		
<u>CRIMINAL LAW</u> Topic: <i>Negotiating for Criminal Lawyers</i> Speaker: John Patrick Dolan, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>FAMILY LAW</u> Topic: <i>Three Parent Law</i> Speaker: Natalie Keller, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
Saturday, November 8, 2014 – 10:30 a.m. to 12:00 p.m.		
<u>LAW OFFICE ADMINISTRATION</u> Topic: <i>Forensic Document Analysis – Determining the Validity of a Document Using Technology</i> Speakers: Linda Mitchell <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>TRANSACTIONAL LAW</u> Topic: <i>Corporate Filings & Corporate Minute Books</i> Speaker: Matthew Marianno, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
Saturday, November 8, 2014 – 4:00 p.m. to 5:30 p.m.		
<u>CIVIL LITIGATION</u> Topic: <i>California Civil Cases: Differences in Federal and State Court Procedures from Beginning through Appeals</i> Speaker: Kathy Miller, ACP Senior Paralegal, FedEx <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>PROBATE/ESTATE PLANNING</u> Topic: <i>Handling Debts and Creditor's Claims in Trust Administration</i> Speaker: Valerie A. Powers Smith, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	

Name: _____ PLS/CCLS/Paralegal E-mail: _____
 Address/City/State: _____
 Phone: _____ Local Assn.: _____
 Payment: Check (made payable to LSI) Credit Card Number _____ Expiration Date: _____
 Name on Credit Card: _____ Type of Card: Visa _____ M/C _____ CVV No: _____

Send completed form and payment to: Dawn R. Forgeur, CCLS, LSS Coordinator
 500 Capitol Mall, Suite 1600, Sacramento, CA 95814
 Email: drforgeur@stoel.com

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

2014-2015 Legal Specialization Section Leaders

Civil Litigation: Barbara Barregar lsscivillit@gmail.com Criminal Law: Jill Gardella, CCLS jgardella@nablaw.com Family Law: Maria C. Morales Hernandez mhernandez@arcr.com	Law Office Administration: Tammy L. Hunt, CCLS loaleader@thunt.org Probate/Estate Planning: Kristi L. Edwards, CCLS kledwards@justice.com Transactional Law: Annie Parrish, CCLS aparrish@health-law.com
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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.



LEGAL SECRETARIES, INCORPORATED
 CALIFORNIA CERTIFIED LEGAL SECRETARY
WORKSHOP REGISTRATION FORM

“Legal Computations– Calendaring”

Second Quarterly Conference
 Palm Springs Hilton, Palm Springs, CA
 Saturday, November 8, 2014, 7:30-8:30 a.m.
 Cost: \$5.00 for LSI members/\$10.00 for non-LSI members

Oh no! My document is due on a holiday – do I roll the due date back to the previous business day or forward to the next business day? How many extra days do you get to respond to discovery that was served via overnight mail? If these are some of the things that are intimidating you as you study for the CCLS exam, come to this workshop and get the answers to your questions.

REGISTRATION DEADLINE: November 4, 2014

Name: _____ Email: _____
 Address/City/State: _____
 Phone (Work): _____ Local Assn.: _____ LPA/LSA

Please make check payable to LSI. Mail registration to Terrie Quinton, CCLS, c/o Duckor Spradling Metzger & Wynne, 3043 4th Ave., San Diego, CA 92103, and email registration to quinton@dsmw.com.

CCLS CREDIT WILL BE GIVEN FOR THIS WORKSHOP

Court Reporters & Conference Rooms In Walnut Creek

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(925) 932-5200

Professional Reporting Services
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 Walnut Creek, CA 94596
 Prs@PrsDepo.com | www.ProRepSvs.com

Answers to CCLS Quiz

1. C
2. D
3. A
4. D
5. C
6. D
7. B
8. A
9. A
10. D

Back By Popular Demand

Sacramento Legal Secretaries Association

2014-2015 BOSS OF THE YEAR CONTEST



Nominations for SLSA's 2014-2015 BOSS OF THE YEAR are now being accepted. In an essay of 500 words or less, explain why your boss should be BOSS OF THE YEAR, and describe your boss in three words.

Please email your essay by October 15, 2014 to the following judges:

Maimie Chyinski – mchyinski@f3law.com

Teri McClory, CCLS – teretad@metzlawonline.com

Maryanna Rickner – mcrickner@gmail.com

All essays submitted by the deadline will be considered. The BOSS OF THE YEAR winner will be announced at the November 20, 2014 SLSA Dinner Meeting. The winner's nominating assistant will receive a gift card, and the winner will receive a plaque.



Back By Popular Demand

Sacramento Legal Secretaries Association

2014-2015

LEGAL PROFESSIONAL OF THE YEAR CONTEST



Nominations for SLSA's 2014-2015 LEGAL PROFESSIONAL OF THE YEAR are now being accepted. In an essay of 500 words or less, explain why your nominee (who must be a member of SLSA) should be LEGAL PROFESSIONAL OF THE YEAR, and describe the nominee in three words.

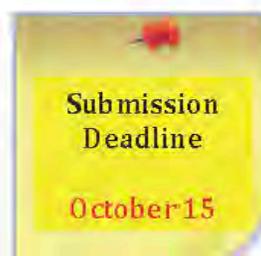
Please email your essay by October 15, 2014 to the following judges:

Maimie Chyinski - mchyinski@f3law.com

Teri McClory, CCLS - teretad@metzlawonline.com

Maryanna Rickner - mcrickner@gmail.com

All essays submitted by the deadline will be considered. The LEGAL PROFESSIONAL OF THE YEAR winner will be announced at the November 20, 2014 SLSA Dinner Meeting. In recognition of his or her accomplishment, the winner will be awarded a plaque, certificate of recognition, and a gift card.





Law Office Products and Management: Tackle the Overload of Information

Submitted By Elizabeth Madden, CCLS

Reprinted with permission of NALA, The Association of Legal Assistants/Paralegals, and by Richelle McFate, the article originally appeared in the November/December 2013 Facts & Findings, NALA's bi-monthly magazine for paralegals. The article is reprinted here in its entirety. For further information, contact NALA at www.nala.org or phone (918) 587-6828.

I am a note taking junkie. Or maybe I'm just forgetful. Either way, I have reminders everywhere. There are notes stuck on my refrigerator and microwave at home, a million scraps and napkin pieces with notes in my purse, and stickies all around my computer monitor. These little pieces of paper work fine at home, but in the office, I've found I need to stay better organized if I want any hope of providing fast and efficient service when I get a call at the Help Desk. The faster I can find a piece of information, the better.

I have tried many different techniques from creating Word documents to using the Desktop Sticky Notes feature in Windows®, but over the years I've honed in on what works best for me. I have found I like using Posts™ in Outlook™.

If you use Outlook as your email program, you already know it shines when it comes to storing, organizing and searching for information. These features make it perfect for creating an information store for all my notes on... well, everything.

As far back as Outlook 2003, it was possible to create "Posts" in a folder. Posts are not really emails or documents, nor are they sticky notes, but rather, they are some combination of the three. Posts differ from the Notes feature in Outlook in that Notes are like sticky notes. You type the information you want on them and can open them up and look at them any time you'd like, but there is only one font choice. They also do not come up in email search results. Posts, on the other hand, are like emails in terms of the abilities to type and format text, search for content, and forward the content to other people.

I am currently using Outlook 2010 and find the New Post button under New Items, then More Items. With a right click, I can add the button to my Quick Access Toolbar to keep it handy. When I choose that button, I can type and format my note however I would like. When I do a search, if the Post matches my search criteria, it shows up in the search results list. When I get new information related to an existing Post, I can open it up and edit it. And, as mentioned earlier, I have the ability to open a Post and forward it as if it were an email.

To round out this solution, here are a few other tips that make this a great tool.

Create folders to organize the different types of notes. I create folders by topics, teams, and types of solutions.

Create categories to sort within the folders based on importance and set the view to group based on Category. I have a category for "Ideas" that helps me separate ideas from solutions.

Open a new Post and add the "Move to Other Folder..." button to the Post's Quick Access Toolbar so Posts can quickly be moved from one folder to another if they get misfiled.

Type keywords at the bottom of the Post. My keywords are terms that are related to the information in the Post but not otherwise used such as contextual versions of words. I often abbreviate Outlook as "OL" so I add that as a keyword to improve searching.

When searching, use "AND" between terms to narrow the scope of the search.

I do all my searches using the Search box above my email list. I click the blue hyperlink to "Try searching again in All Mail Items" as needed. Once I found how well Posts worked for me, I started putting all my little pieces of paper in Outlook. I'm proud to say I've tackled the overload of information I deal with on a daily basis and have even gotten the number of stickies on my monitor down to 12. Those dozen are the ones that I want at my fingertips without having to do a search.

By Richelle McFate
RMcFate@fosterswift.com

Richelle McFate is the Help Desk and Training Coordinator for the Michigan law firm, Foster Swift Collins & Smith, PC. She has been providing end-user technical support and software training to legal professionals for 13 years. In her current position, she uses remote access to troubleshoot a variety of software applications. She also develops custom databases and dabbles in Web design. For the past three years, she has been writing articles and gathering tips and tricks for a monthly IT newsletter for Foster Swift.



Submitted By Lynne Koroush, CCLS

Education, Education, Education!

One of the most important benefits SLSA members enjoy is access to affordable, quality, continuing legal

education. Members also receive significantly discounted rates on continuing education workshops, online education, and publications specifically written for legal support professionals through Legal Secretaries, Inc. ("LSI").

Did You Know?

During the 2013-2014 term, SLSA presented 11 monthly educational programs, including two Day in Court events and a mock trial. SLSA also held four lunch lesson programs, and conducted two Beginning Legal Secretarial Training courses. SLSA published 12 issues of its monthly publication, *The Legal Eagle*, with every issue containing articles on legal procedures, news and updates from the courts, and law office products and management.

Did You Know?

That's a total of 29 separate educational opportunities offered by SLSA in one year.

Did You Know?

LSI held 24 Legal Specialization Section workshops during the last term, as well as four workshops presented by the Continuing Education Council, and four CCLS workshops. LSI also conducted a total of six online training courses and webinars, including a

Beginning Legal Secretarial Training course, a State Court Discovery course, a mini-course on Table of Authorities, and two CCLS study groups. LSI published four issues of its quarterly magazine, *The Legal Secretary*, which included educational articles from judges, attorneys, court officials, and legal support professionals from all over California.

Did You Know?

That's a total of 42 separate educational offerings by LSI in one year.

Did You Know?

That your membership in SLSA afforded you a total of OVER 70 SEPARATE CONTINUING LEGAL EDUCATION OPPORTUNITIES IN 2013-2014 ALONE? That's an average of nearly 6 per month!

Did You Know?

All of these educational programs, publications, and opportunities are organized, planned, authored, presented and taught by volunteers.

Do You Know?

Where else you will find that?



LSI

*Educating California's
Legal Support Professionals*

LSI CODE OF ETHICS

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

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



Submitted By Lacy Monserrat

EC RECOMMENDATIONS FOR STANDING RULE AMENDMENTS

STANDING RULE AMENDMENT #1: Standing Rule 32.1:

The EC recommends amending SR 32.1 by inserting the word "Support" between "Legal" and "Professionals."

If passed, the new SR 32.1 language would read as follows:

LSI shall use as a tagline to assist with marketing, "Educating California's Legal Support Professionals."

STANDING RULE AMENDMENT #2: Standing Rule 5.1:

The EC Recommends amending SR 5.1 to strike the word "shall" and replace it with "may" immediately after "LSI" and insert "If a contest is held," before the start of the second sentence.

If passed, the new SR 5.1 language would read as follows:

LSI ~~shall~~ may conduct a Local Association History Book Contest at each Annual Conference, the rules of which shall be established by the LSI Historian and approved by the Executive Committee. If the contest is held, the total cost of each Local Association's History Book entered in the History Book Contest shall not exceed \$300. Monetary prizes of \$50 shall be awarded in each class of membership.

STANDING RULE AMENDMENT #3: Standing Rule 15.1:

The EC Recommends amending SR 15.1 to reflect the current title of the Liaison of the Law Practice Management and Technology Section of the State Bar, of California.

15.1 ~~Special-Advisor Liaison~~ to the State Bar of California Law Practice Management and Technology Section.

At the invitation of the State Bar of California, the President shall appoint a member of LSI to serve as ~~an advisory member of liaison~~ to the Executive

Committee of the Law Practice Management and Technology Section of the State Bar, for a term simultaneous with the State Bar term. The ~~Special-Advisor Liaison~~ shall attend Law Practice Management and Technology Section Executive Committee Meetings and assist with its educational programs and promotional activities, and report as requested by the President.

If passed, the new SR 15.1 would read as follows:

15.1 Liaison to the State Bar of California Law Practice Management and Technology Section.

At the invitation of the State Bar of California, the President shall appoint a member of LSI to serve as a liaison to the Executive Committee of the Law Practice Management and Technology Section of the State Bar, for a term simultaneous with the State Bar term. The Liaison shall attend Law Practice Management and Technology Section Executive Committee Meetings and assist with its educational programs and promotional activities, and report as requested by the President.

CCLS STANDING RULE AMENDMENT RECOMMENDATIONS

CCLS Certifying Board Recommendation No. 1:

To Amend Standing Rule 12.1 by striking "and" and inserting "or" before educators. If passed, it would read as follows:

The Certifying Board for the California Certified Legal Secretary program shall consist of five LSI members who are certified as California Certified Legal Secretaries and two attorneys or educators.

CCLS Certifying Board Recommendation No. 2:

To Amend Standing Rule 12.2 by striking "; or, as necessary to fill a vacancy created by the resignation, removal or inability to serve of an LSI member previously appointed to the CCLS Certifying Board." and inserting the following new sentence at the end: "Should it become necessary to fill a vacancy created by the resignation, removal, or inability to serve of an LSI member previously appointed to the CCLS Certifying Board, the LSI President shall appoint a new LSI member for a term of four years to fill the vacancy." If passed, it would read as follows:

The LSI President shall appoint the requisite number of LSI members to the CCLS Certifying Board in February of each year for terms of four years each. Should it become necessary to fill a vacancy created by the resignation, removal, or inability to serve of an LSI member previously appointed to the CCLS Certifying Board, the LSI President shall appoint a new LSI member for a term of four years to fill the vacancy.

CCLS Certifying Board Recommendation No 3:

To Amend Standing Rule 12.3 by striking “and” and inserting “or” before educators in the first sentence. If passed, it would read as follows:

The LSI President shall appoint the requisite number of attorneys or educators to the CCLS Certifying Board in February of each year for terms of two years each; or, as necessary to fill a vacancy created by the resignation, removal or inability to serve of an attorney or educator previously appointed to the CCLS Certifying Board.

EC RECOMMENDATION TO PURCHASE MEDIA LIABILITY INSURANCE

EC Recommendation #1: EC recommendation to purchase media liability insurance at \$1,349.00.

MARKETING COMMITTEE RECOMMENDATIONS

Marketing Committee Recommendation #1: Marketing Committee recommends that when an advertiser purchases a quarterly magazine ad, they receive a special priced webpage static ad for an additional \$80.00.

Marketing Committee Recommendation #2: The Marketing Committee recommends amending Standing Rule 26.2 by deleting the reference of payment per click which reads “After first contract, 'additional per click, payable quarterly at 10 cents.”

If passed, it would read as follows:

The following prepaid prices shall be charged for advertising on the LSI website:

Annual static, ad for 12 months , first contract, home page.....2,000

Annual static ad for 12 months, first contract, other than home page.....1,500

Quarterly static ad for 3 months, first contract, home page.....500

Quarterly static ad for 3 months, first contract, other than home page.....375

Ten percent discount overall to advertisers who advertise in both

The Legal Secretary and the LSI Website.



CHAPTER ACHIEVEMENT REPORTING FORM 2014-2015

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, 2014, through March 31, 2015.

Please complete this form and mail or email it to SLSA's Governor, Lacy Monserrat. 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 2014-2015 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, 2015. (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: Lacy A. Monserrat, Governor
Carroll, Burdick & McDonough LLP
980 9th Street, Suite 380
Sacramento, CA 95814
governor@slsa.org



Submitted By Corene 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.



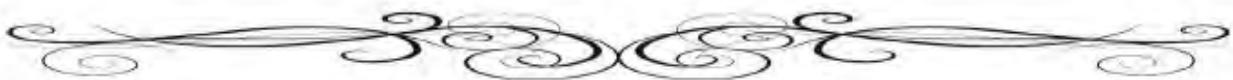
Parliamentarian's Report: Minutes

Submitted By Astrid Watterson, CCLS

Minutes are important to any organization as they are considered the official record of the organization. If you've been involved in several organizations, you may have come across many different variations of minutes. However, according to *Robert's Rules of Order*, minutes are a record of actions taken.

Question: Isn't it necessary to summarize matters discussed at a meeting in the minutes of that meeting in order for the minutes to be complete?

Answer: Not only is it not necessary to summarize matters discussed at a meeting in the minutes of that meeting, it is improper to do so. Minutes are a record of what was done at a meeting, not a record of what was said. (*Robert's Rules of Order* (10th Edition), at p. 451.)



**BENEFITS
LEGAL SECRETARIES INCORPORATED (LSI)**

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

<p>WORKING ADVANTAGE Toll Free: (800) 565-3712 www.workingadvantage.com Discount on event tickets, movie tickets, family events, gift cards and more. Member ID: Contact LSI Corporate Office, lsiorg@suddenlinkmail.com, or LSI Vice President</p>	<p>HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com</p>
FINANCIAL PROVIDERS	
<p>CAPITAL INVESTMENT ADVISERS Emerson J. French, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 www.ciadvisers.com Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>	<p>LEGACY WEALTH MANAGEMENT Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz Offering John Hancock Long Term Care Insurance and Life Insurance Annuities, Retirement, Investment and Estate Planning, Mutual Funds and 401K</p>
<p>DAVID WHITE & ASSOCIATES Wealth Accumulation and Preservation 3150 Crow Canyon Place, Suite 2000 San Ramon, CA 94583 (800) 548-2671 Contact: Ryan Gonzales (Ext. 2682) rgonzales@dwassociates.com or Matt Kay (Ext. 2628) mkay@dwassociates.com Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance</p>	<p>ATHLETES BUSINESS CONSULTANTS Jory Wolf, President/Founder 350 10th Avenue, Suite 1000 San Diego, CA 92101 Office: (858) 886-9842 Cell: (510) 919-9062 jory@athletesbiz.com California Insurance License: 0E88330 10% Discount on Long Term Care. Call for Information on Life, Long Term, and Disability Insurance, as well as Commercial and Residential Lending.</p>
CREDIT UNIONS	
<p>LA FINANCIAL FEDERAL CREDIT UNION P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org Open to Anyone Living, Working or Worshipping in Los Angeles County, or Referral From existing Member.</p>	<p>PROVIDENT CREDIT UNION 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603 (800) 632-4699 or (650) 508-0300 www.providentcu.org All LSI Members are Eligible to Join.</p>

QUESTIONS AND CONCERNS, CONTACT:

Jennifer L. Page, CCLS, LSI Vice President
LSI Marketing Committee Coordinator
P.O. Box 150427
San Rafael, CA 94915
Home: (415) 989-1010
Cell: (415) 710-3402
jlpage@ix.netcom.com

**LEGAL SECRETARIES, INCORPORATED
MEMBERSHIP LIST AS OF 07/31/14**

Total Members (Fiscal Year-end 4/30/14)	Association		New Members	Transfer Members	Continuing Members	Total Members
42	Alameda County	LSA	5		27	32
6	Antelope Valley	LSA				
40	Beverly Hills/Century City	LSA	3		29	32
15	Butte County	LPA	0		4	4
17	Conejo Valley	LPA	1		13	14
15	Desert Palm	LPA	11		14	25
17	El Dorado County	LPA	5		14	19
71	Fresno County	LPA	32		41	73
37	Humboldt County	LPA	1		28	29
36	Imperial County	LPA	3		13	16
33	Livermore-Amador Valley	LPA	0		18	18
55	Long Beach	LPA	6		40	46
58	Los Angeles	LSA	11		43	54
33	Marin County	LPA	2		17	19
38	Merced County	LPA	6		33	39
0	Monterey County	LSA				
60	Mt. Diablo	LPA	2		27	29
14	Napa County	LSA			14	14
82	Orange County	LSA	11		45	56
24	Placer County	LPA	3		11	14
1	Redding	LPA				
18	Rio Hondo District	LPA	5		12	17
19	Riverside	LPA	5		14	19
168	Sacramento	LSA	33		96	129
217	San Diego	LSA	20		156	176
55	San Fernando Valley	LSA			27	27
84	San Francisco	LPA	10		54	64
41	San Gabriel Valley	LSA	1		22	23
72	San Mateo County	LSA	1		34	35
24	Santa Barbara	LPA	4		14	18
84	Santa Clara County	LSA	21		53	74
6	Santa Cruz County	LPA	0		5	5
20	Santa Maria	LPA	8		12	20
30	Sonoma County	LSA	5		22	27
7	Southern Butte	LSA	1		7	8
36	Stanislaus County	LPA	1		30	31
27	Stockton-San Joaquin	LPA	0		23	23
4	Trinity County	LSA	0		4	4
23	Ventura County	LPA	1		12	13
46	Members at Large		3		11	14
1733	YTD TOTALS					1260

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Submitted By Jaymie Moralez

This free benefit offered by SLSA 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 desiring/needing to place an advertisement for employment on SLSA's website may view the "Employment Opportunities" page on this website and format the advertisement like those already posted. Employers will also 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. Advertisements for employment are usually posted as soon as possible.

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.

(8/29/14) Legal Secretary. This position is in the Department of Fish and Wildlife's Office of the General Counsel. The incumbent will work under the direct supervision of the Assistant Chief Counsel, but will also take direction from the General Counsel. The incumbent will be responsible for assisting designated attorneys with legal support duties and functions. Please click here for complete job description and how to apply.

http://jobs.spb.ca.gov/wvpos/more_info.cfm?recno=571010.

(8/25/14) Legal Assistant. Multi-state AV rated law firm seeks to hire an experienced and professional full-time Legal Assistant for its Sacramento Office. The ideal candidate will have at least 5 years' experience in Civil Litigation (Construction Defect, Insurance Defense, and Mortgage Banking); strong computer skills (Word, Excel, and Outlook); good typing skills with transcription experience; excellent knowledge of court filings (to include state and federal courts); good calendaring skills; experience with creating and working with Tables of Authorities and Tables of Contents; must be a self-starter with a willingness to work as a team player in a fast-paced office. Attendance, punctuality, attention to detail, and organizational skills are additional musts. ProLaw and iManage experience is a plus. Please submit cover letter and resume to employment@wolfeyman.com.

(8/22/14) Litigation Legal Secretary. Sacramento defense firm seeks full-time secretary with 3+ years in litigation experience and knowledge of federal, state, local rules, and court filing procedures. Candidate must have strong organizational, calendaring, and computer skills (Word 2010). Excellent spelling, grammar, proofreading, and communication skills required. Must be highly motivated, dependable, detail oriented, and possess a team player attitude. Send cover letter, resume, and references to hrdeptlaw@yahoo.com.

(8/21/14) Legal Secretary. Growing landlord-tenant firm seeking experienced legal secretary who is familiar with unlawful detainer procedures (preparing unlawful detainer complaints, defaults, writs, and sheriff instructions) as well as managing trial and travel arrangements. Prefer some supervisory experience. Must have at least two years experience working with a law firm representing landlords, as well as knowledge with Timeslips, Essential forms, and ECF filing. Firm offers competitive salary, paid parking, medical insurance, and 401(k) with profit sharing. Please submit your resume and references to jwc-mhlaw@sbcglobal.net.

(8/20/14) Legal Secretary II Exam. The County of Sacramento is accepting applications for Legal Secretary II exam 28111-C. A Legal Secretary II performs a wide variety of specialized legal and general clerical work which includes composing and typing legal documents and correspondence, processing of legal documents, and maintaining legal case records. The work performed requires independent judgment/discretion and is subject to minimal direction and instruction. The range of duties typically involves performing work in multiple, unrelated areas of law and for several attorneys, and/or other staff. Incumbents may be required to use shorthand to perform some work assignments and frequently provide lead direction to other clerical staff. Applicants must meet the special requirements below AND EITHER: One year of experience in Sacramento County service in the class of Legal Secretary I OR Two years of clerical experience involving the preparation and processing of legal documents for court action such as those described in the Examples of Duties. Education or training from an accredited college, business school, or training school that is directly related to the Knowledge and Abilities specified for this class may be substituted for a maximum of one year of the required experience (30 semester units or 45 quarter units equal one year of experience). **Special**

Requirements All positions in this class require the ability to type from clear copy at the rate of 50 net words per minute. Some positions in this class may require taking oral dictation involving legal terminology. To be eligible for appointment to a “short-hand-required” position, the applicant must have the ability to take oral dictation, using any speedwriting method, at the rate of 100 words per minute and transcribe at the rate of 30 net words per minute. Where the oral dictation skill is required, it is used in performing the typical duties of the class as shown in the “Examples of Duties” (located in the class specification). The Civil Service Commission approved the use of selective certification for this special skill on March 7, 1985. For the complete job posting and to apply [click here](#).

(8/15/14) Part Time Legal Assistant. Sole Practitioner in Gold River is seeking a part time legal assistant. 9-12 hours/wk; 3 days/wk; afternoons preferred. Must have experience with litigation documents including pleadings and discovery and be familiar with local court rules in the greater Sacramento area. Should be proficient with use of Word and have strong organizational and proofreading skills. Real estate background a plus. Interested candidates should submit resume and cover letter with salary expectations via e-mail to Samuels@Samuels-Law.com.

(8/14/14) Legal Secretary/Legal Assistant. A well-established mid-size Sacramento law firm is seeking a full-time experienced (10 years minimum) litigation secretary/legal assistant for a partner with a heavy case load and who handles personal injury and medical malpractice defense in California and Nevada. This individual must have previous law and motion, discovery and trial preparation experience. Must have knowledge of California and Federal court rules. Knowledge of Nevada rules and procedures would be a plus but is not required; however, be willing to learn Nevada rules and procedures. Essential duties include: managing a calendar for multiple attorneys, litigation-related duties including document preparation, drafting and filing legal documents including correspondence, pleadings and orders, transcribing dictation, proofreading and editing documents, opening and closing files. Knowledge/Skills/Abilities: MS Word, Outlook, Legal Solutions, Abacus, Federal court rules, California State and local rules, court filing procedures, e-filing, strong spelling and grammar skills. A successful candidate would be able to work independently and be a team player. The firm offers health/dental/life/disability benefits as well as a pension/profit sharing plan. Please submit your cover letter and resume to: phile@ltglaw.net.

(8/8/14) Secretary/Legal Assistant. A well-established Midtown law firm is seeking a full-time experienced (with 3-5 years minimum) litigation secretary/legal assistant for our eminent domain and real estate practice. The candidate must have previous law and motion, discovery, trial preparation, and appellate support experience. He or she will be responsible for managing a calendar for multiple attorneys, document preparation (including properly formatting, proofreading, filing, and serving motions and other legal documents). A successful candidate will meet the following criteria: Have strong communication skills, both written and verbal. Be upbeat, pleasant and professional, and a team player. Possess strong organizational and time management skills, with the ability to follow instructions closely. Be proficient in the use of MS Office Suite, including Word and Outlook; WordPerfect; Dropbox; Legal Solutions; and TABs. Have a working knowledge of current rules of civil procedure and rules of court, calendaring procedures, and e-filing and fax-filing, and familiarity with state and federal and appellate courts. Have experience with discovery, trial preparation, preparation of motions and briefs, and formatting documents generally, including creating tables of contents and authorities. Be proficient in transcribing dictation. Competitive compensation and benefits and parking will be offered to the selected candidate. Please submit your resume and salary requirements to eangelo@dnlc.net. No phone calls please.



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