

THE LEGAL EAGLE

Book 23, Issue No. 3

AUGUST 2022



**NEW SLSA
BEGINNING LEGAL
PROFESSIONAL
TRAINING COURSE**

**Member
Appreciation
Picnic!**

**Preparing for
Trial: The
Other
Checklist**

Welcome to
SACRAMENTO
CITY OF TREES



www.slsa.org



simplifying professional IT

SERVICES AVAILABLE

• NETWORK ENGINEERING

We provide quality systems analysis, design, installation and proactive maintenance to support your new or existing business communication needs. Managing everything from the cabling and network hardware to building traditional servers and transitioning to cloud-based environments.

• HELP DESK AND MAINTENANCE

We provide experienced computer consultants when you need them. We provide proactive maintenance to help pinpoint weaknesses, resolve existing problems and minimize those dreaded down times.

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We provide disaster recovery plans and provide prompt action in the case of a technology crisis until it is resolved to your satisfaction.

• PROFESSIONAL TRAINING

We provide professional training in classroom and one-on-one settings with a Microsoft Certified Trainer on staff, experienced in legal applications and workflow. We can help you achieve improved productivity and valuable experience targeted to your specific needs.

PERSONALIZED BUSINESS TECHNOLOGY SOLUTIONS

WHY ARE WE DIFFERENT?

Terrapin has extensive experience working with the legal community, including previously serving as full time IT staff in Sacramento law firms before transitioning to consulting roles at Terrapin. We offer quality customer service and reliable consulting services; from day-to-day user support to system maintenance and complete system engineering. Our dedicated staff stays current on present and future technologies so you can concentrate on your billable time, not your technology.

Terrapin knows the workflow and needs specific to attorneys, paralegals, secretaries and other staff. We have a deep understanding of the hardware and software specific to the legal industry such as OpenText, Worldox, Workshare, Microsystems, HotDocs, Legal Solutions, CompuLaw, Abacus, and more.

WHAT OTHER FIRMS HAVE TO SAY

"As a new business we really didn't know what our IT needs would be. The team at Terrapin took our thoughts and turned them into a highly functional and versatile reality..."

— Chad Coleman / Coleman Chavez & Allen LLP

"...they have provided clear options, direct answers, prompt service and value. They have also consistently demonstrated pragmatism and awareness of cost when they recommend solutions and present our options."

— Jeffery Owensby / Rediger McHugh & Hubbert

"Terrapin makes us feel like we're their only customer. They're never far from email, including early in the morning, nights and weekends. They're sensitive to our needs as a small business and knowledgeable about our hardware and software."

— Greg Valenza / Shaw Valenza LLP

1501 Sports Drive Sacramento, CA 95834 916.481.1991 info@terrapiintechology.com www.terrapiintechology.com

THE LEGAL EAGLE

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AUGUST 2022

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From the Editor

The Legal Eagle welcomes letters and article suggestions from readers. Please send them to Lynne Prescott at president@slsa.org. Sacramento Legal Secretaries Association reserves the right to edit articles and letters sent in for publication. The deadline for all submittals is noted in "Dates to Remember" section of this 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 Sacramento Legal Secretaries Association.

Sacramento Legal Secretaries Association



General Membership Dinner Meeting

Thursday, August 18, 2022 - 6:15 p.m. – 8:00 p.m.

Meet and Greet – 5:30 p.m. – 6:15 p.m.

BLACK BEAR DINER – 2700 El Centro Road, Sacramento

Cultivating GRATITUDE AND TEAMWORK In the Workplace

Guest Speaker:

Bryan Hawkins

Partner, *Stoel Rives, LLP*

President, *Sacramento County Bar Association*



MCLE & CCLS Credit: Sacramento Legal Secretaries Association is a local association of Legal Professionals, Incorporated, an approved provider, and certifies that this activity has been approved for maximum continuing legal education credit in the amount of **1.00 hours** by the State Bar of California.

Special Bring One, Get One (BOGO) Promotion!

For the months of June, July, and August, bring a potential new member (or more than one) to the meeting and both you and your guest will receive a small appreciation gift. If the potential member joins SLSA, both the sponsoring member and the new member will be entered into separate drawings for an opportunity to win VERY nice prizes!
So get your BOGO on!!

Register Today!

Deadline to RSVP: Tuesday, August 16, 2022

Two Ways to Register:

- Online at www.slsa.org under Events (Preferred)
- E-mail to: reservations@slsa.org (include menu choice)

Registration Fee:

\$30 SLSA Members and Non-Members

Make checks payable to “SLSA” and mail to:

Marci Frazier, Registration Chair
Downey Brand, LLP
621 Capitol Mall, 18th Floor
Sacramento, CA 95814
marcifrazier1@gmail.com

Dinner Menu – Choice of:

Chicken Avocado Club

Triple-stacked marinated grilled chicken breast, avocado, bacon, lettuce, tomato, Swiss cheese and mayo

Tri-Tip Dip

Tri-tip, thinly sliced and stacked tall on a Tribeca roll and served with au jus

Reuben

Corn beef piled on grilled rye with Swiss cheese, sauerkraut & 1000 Island dressing

Veggie Burger

Lettuce, onion, tomato, mayo, 1000 Island dressing

Salad

Crispy chicken cobb salad or taco salad or garden salad

Thank you to our August Vendor Partner



Sacramento Legal Secretaries Association



General Membership Dinner Meeting

Thursday, September 15, 2022 - 6:15 p.m. – 8:00 p.m.

Meet and Greet – 5:30 p.m. – 6:15 p.m.

BLACK BEAR DINER – 2700 El Centro Road, Sacramento

ESTATE PLANNING 101:

- Basics of Estate Planning • How to Avoid Probate
- Strategies to Protect Your Legacy

Guest Speaker:

Hannah A. Shakin

Attorney, Downey Brand, LLP



We are also honored to have Legal Professionals, Incorporated's (LPI) new President, Rod Cardinale Jr., at our meeting. He will discuss his theme of "Stronger Together," his goals for his term, and upcoming changes to the LPI's educational programs.

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Register Today!

Deadline to RSVP: Tuesday, September 13, 2022

Two Ways to Register:

- Online at www.slsa.org under Events (Preferred)
- E-mail to: reservations@slsa.org (include menu choice)

Registration Fee:

\$30 SLSA Members and Non-Members

Make checks payable to "SLSA" and mail to:

Marci Frazier, Registration Chair
Downey Brand, LLP
621 Capitol Mall, 18th Floor
Sacramento, CA 95814
marcifrazier1@gmail.com

Dinner Menu – Choice of:

Bacon & Cheddar Burger

Burger topped with diced smoked bacon and cheddar cheese, served with fries

Fish & Chips

Cod fillets lightly battered and fried, served with fries, coleslaw and tartar sauce

Chicken Strips

4 breaded chicken strips with choice of bbq sauce, bacon ranch or bleu cheese dressing for dipping, served with fries

Veggie Burger

Lettuce, onion, tomato, mayo, 1000 Island dressing

Salad

Crispy chicken cobb salad or tuna salad or garden salad

Thanks to our September vendor partner!



FIRSTLEGAL

Last Chance - Bring One, Get One!

SLSA Wants You to

Get Your
BOGO On!

BRING 1, GET 1

For the months of June, July, and August, bring a guest (or more than one!) to the meetings. Each member who brings a potential member will receive a small gift, as will the potential member. If your guest joins SLSA, you, as the sponsor, will be entered into a drawing for the opportunity to win a VERY nice prize! Similarly, all newly sponsored members will be entered into a separate opportunity drawing for the chance to win a VERY nice prize. After all, you enjoy the educational and professional benefits of membership, so why not share and ensure that your teammates and friends enjoy those same benefits? The winners of the BOGO Promotion will be drawn in September.

So, Bring One and Get One!



**It always seems
impossible until it's done.
- Nelson Mandela**



President's Message

By Lynne Prescott, CCLS, SLSA President

Don't Stop Believing!

Those are words to live by, not just the title of one of the greatest rock anthems of all time. I say that because I have never stopped believing in this association, and in the few months since we started this new fiscal year, you have also made it clear that you have never stopped believing.

For example, SLSA ended the 2021-2022 fiscal year with 66 members. As of this writing, we have already surpassed that number, thanks to the new and returning members we have received thus far. We inducted 13 members at the July meeting alone!

The SLSA Executive Board and Committee Chairs are also putting their feet to faith and have planned a fantastic year full of educational, professional development, and social networking opportunities. Here's a preview of what's to come:

August 2022

18 - SLSA Meeting, Guest Speaker Bryan Hawkins, Sacramento County Bar Association President, Topic: Gratitude and Teamwork in the Workplace. *See flyer, page 4.*

18 - BOGO Contest, Final Opportunity to Win that Big Prize by Bringing a Guest to the Meeting and Sponsoring Their Membership. *See page 6.*

September 2022

15 - SLSA Meeting, Guest Speaker Hannah Shakin, Topic: Estate Planning 101. *See flyer, page 5.*
17 - Member Appreciation Picnic (FREE), William Land Park. *See flyer, page 9.*

October 2022

5 - SLSA 10-Week Beginning Legal Professional Training Course Begins
15 & 16 - Fairytale Town Safe and Super Halloween.
20 - SLSA Meeting, Bosses' Appreciation Night
22 & 23 - Fairytale Town Safe and Super Halloween.

November 2022

11-13 - SLSA & Placer County LPA Co-Host LPI's 2nd Quarterly Conference, Hilton Arden West, Sacramento.
17 - SLSA Meeting

December 2022

15 - SLSA Mock Trial

January 2023

19 - Annual Court Updates Meeting

February 2023

16 - SLSA Meeting, Vendor Appreciation Night (*Tentative*)

March 2023

16 - SLSA Meeting & Elections

In addition to all of this, we also hope to resume the Lunchtime Learning Lessons this year. As you can see, there's no reason to stop believing!

-Lynne

Summer Court Series



LSS SUMMER COURT SERIES

JUNE 2022

06.02.2022 - USDC, Northern District Court

06.23.2022 - Santa Clara Superior Court

06.30.2022 - El Dorado Superior Court

JULY 2022

07.07.2022 - San Joaquin Superior Court

07.14.2022 - San Diego Superior Court

07.21.2022 - USDC, Southern District Court

AUGUST 2022

08.04.2022 - Los Angeles Superior Court

08.11.2022 - Placer Superior Court

08.18.2022 - USDC, Central District Court

SEPTEMBER 2022

09.29.2022 - Sacramento Superior Court



The cost to attend each webinar is as follows:

- LPI Member/Local Association Member - \$25
- Non-Members or Attorney - \$45
- Members of ALL Six (6) Legal Specialization Sections (LSS) - FREE!
(LSS Membership is only \$75/year and it includes all live seminars and webinars through April 30, 2023)
- LPI Class Pass - More info on next page

Online registration and payment available at:
<https://www.legalprofessionalsinc.org/events/>
or scan the QR code



THE LEGAL SPECIALIZATION SECTIONS IS A PROGRAM OF LEGAL PROFESSIONALS, INC., AN APPROVED PROVIDER, AND CERTIFIES THAT EACH OF THESE WEBINARS HAVE BEEN APPROVED FOR MINIMUM CONTINUING EDUCATION CREDIT IN THE AMOUNT OF 1.0 HOUR BY THE STATE BAR OF CALIFORNIA.

FREE!

FOR SLSA MEMBERS
AND THEIR FAMILIES

SPONSORED BY



U.S. Legal
Support

SLSA MEMBER APPRECIATION PICNIC

September 17, 2022

11 AM - 3 PM

William Land Park

Area GA21 on 12th Ave.

Off Riverside Blvd.

Plenty of Street Parking



GAMES/ACTIVITIES:

- GIANT JENGA
- SACK RACES
- BADMINTON
- 3-LEGGED RACES
- PLINGPONG
- DOOR PRIZES
- AND LOTS MORE!

BRING:

- YOUR OWN CHAIRS.
- DESSERT TO SHARE. ATTENDEES WILL VOTE FOR BEST DESSERT! PRIZES FOR FIRST AND SECOND PLACE WINNERS!
- YOUR FAMILY! (ZOO, FAIRYTALE TOWN, FUNDERLAND ARE ALL NEARBY)

**RSVP BY
SEPTEMBER 12**

RESERVATIONS@SLSA.ORG

Wm. Land Park 3800 S. Land Park Dr.

GA-1 2 Tables-1sm BBQ	GA-7 2 Tables-2sm BBQ	GA-12 4 Tables-1sm BBQ	GA-18 3 Tables-1sm BBQ
GA-2 1 Table-1sm BBQ	GA-8 11 Tables-1sm BBQ	GA-13 6 Tables-2sm BBQ	GA-19 2 Tables-1sm BBQ
GA-3 2 Tables-1sm BBQ	GA-9 10 Tables-1lg BBQ	GA-14 6 Tables-3sm BBQ	GA-20 2 Tables-2sm BBQ
GA-4 Village Green	GA-10 10 Tables-2sm BBQ	GA-15 8 Tables-4sm BBQ	GA-21 2 Tables-1sm BBQ
GA-5 2 Tables-1sm BBQ	GA-11 4 Tables-1sm BBQ	GA-16 3 Tables-1 sm BBQ	GA-22 2 Tables-1sm BBQ
GA-6 2 Tables-1sm BBQ		GA-17 4 Tables-2sm BBQ	

Sandwich Fixin's, Side Dishes, and Beverages Provided

Bring Your Best Dessert for the Dessert Competition!

THANK YOU TO OUR SPONSOR



SLSA Meetings are In-Person Again!



SLSA is holding live, in-person meetings again!

The Black Bear Diner's banquet room is a perfect spot for SLSA's monthly meetings. The room can comfortably accommodate more than 60 people, has a wide screen monitor for Zoom or video presentations, and is set far enough away from the main dining room and the kitchen to allow for business and educational programs to be conducted with little to no noise. Restrooms are close to the banquet room and parking is plentiful (and free!)

Menu choices are plentiful and tasty, offering everything from all-day breakfast to appetizers and desserts. The Black Bear is known for its generous portions, so be prepared to ask for a to-go box!

Located at 2700 El Centro Road, just off I-80, the restaurant is convenient to those working in the downtown area as well as those coming from other parts of town.

The Black Bear's management and staff have been wonderful to work with and they are happy to welcome us as "regulars."



Black Bear Diner

**SLSA's Membership Meetings
are Held on the 3rd Thursday
of Each Month**

Membership Renewal



<https://www.slsa.org/members-only/membership-renewal/>

Late fee of \$5 applies for applications submitted after June 30



Aug. 9 6:00 PM	Executive Board Meeting Black Bear Diner	Sept. 5	Labor Day (All Courts Closed)
Aug. 12-14	LPI 1st Quarterly Conference - Orange, CA	Sept. 13 6:00 PM	Executive Board Meeting Black Bear Diner
Aug. 18 5:30 PM 6:15 PM	SLSA Membership Meeting Black Bear Diner <ul style="list-style-type: none"> • Meet & Greet • Dinner & Business Meeting 	Sept. 15 5:30 PM 6:15 PM	SLSA Membership Meeting Black Bear Diner <ul style="list-style-type: none"> • Meet & Greet • Dinner & Business Meeting
Aug. 25 6-9 PM	Sacramento County Bar Association Bench Bar Reception - Sheraton Grand Hotel, Sacramento	Sept. 17 11 AM - 3 PM	Member Appreciation Picnic - William Land Park, Sacramento



Member News

Crystal Rivera, Vice President

Welcome, and congratulations to the following new SLSA members who were inducted at the July 21, 2022, meeting.

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

Sheila D. Brown – Sheila is a Practice Assistant at Stoel Rives LLP. She has been a legal professional since 1989. She enjoys reading and shopping. She celebrates her birthday on August 27.

Launa Atkinson, CCLS – Launa is a Calendar Clerk at Greenberg Traurig, LLP. She has been a legal professional “forever.”

Brianna Behnoud – Brianna is a SSM1-Legal Support staff at the California State Auditor’s Office. She has been a legal professional since 2016. She enjoys home DIY, boxing, and pets. She celebrates her birthday on May 12.

Ana C. Duran – Ana is a Legal Staff Assistant at the Sacramento City Attorney’s Office. She has been a legal professional since 2018. She celebrates her birthday on December 15.

Susan Finch – Susan is a Legal Secretary at Hanson Bridgett LLP. She has been a legal professional since 2008. She enjoys running/walking/hiking; paddling (canoe, kayak, paddle board); yoga; camping; reading; nature; gardening; pets (dogs & cats). She celebrates her birthday on July 10.

Shannon Gardner– Shannon is a Paralegal at Downey Brand, LLP. She has been a legal professional for over 20 years. She enjoys kayaking, paddleboarding, swimming, and attending water polo games. She celebrates her birthday on December 1.

Danielle Gonzales – Danielle is a Legal Assistant at Longyear & Lavra, LLP. She has been a legal professional for over 20 years. She celebrates her birthday on January 18.

Pamela Anne Lee, CCLS – Pamela is a CLA/CCLS/Secretary at Boutin Jones Inc. She has been a legal professional since the late 80s. She enjoys writing, art, music, hiking, swimming, camping, other outdoor activities, cooking, etc. – she enjoys life! She celebrates her birthday on July 22.

Mindy Lybbert – Mindy is a Legal Practice Assistant at Segal & Associates, PC. She has been a legal professional since 1998. She enjoys running, reading and piano. She celebrates her birthday on October 21.

Wendy Phulps – Wendy is a Legal Secretary at Carbone, Smith & Koyama. She has been a legal professional since 2019. She enjoys reading, yoga and baking. She celebrates her birthday on March 4.

Julie Reece – Julie is a Legal Secretary at Carbone, Smith & Koyama. She has been a legal professional since 2008. She enjoys watching sports (baseball, football), hiking, yoga. She celebrates her birthday on June 27.

Audrey Townsend – Audrey is a Legal Assistant at Longyear & Lavra, LLP. She has been a legal professional since June 2018. She enjoys thrifting, guitar, movies, and art. She celebrates her birthday on February 20.

Michelle Welch – Michelle is a Paralegal at Downey Brand, LLP. She has been a legal professional since 2001. She enjoys camping, running and country music events. She celebrates her birthday on May 20.

Member News

August Birthdays

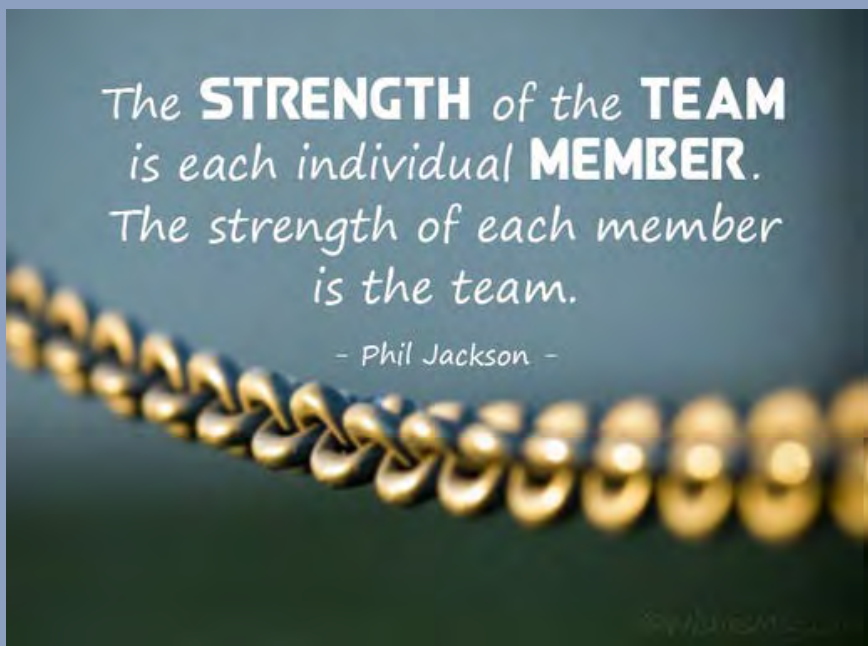
Amy Freeman
Mary Taylor
Sheila D. Brown
Margarita Jakovas

August 4
August 22
August 27
August 29



The **STRENGTH** of the **TEAM**
is each individual **MEMBER**.
The strength of each member
is the team.

- Phil Jackson -



Speaker Spotlight



By Marci Frazier, SLSA Programs Chair

On July 17, 2022, our guest speaker was Tyson Hubbard, a partner at Downey Brand. His riveting subject was Fakes, Frauds, and Forgeries – How to Protect Yourself Against the F-Words. Tyson is an experienced litigator who focuses on trust and estate disputes. He draws from more than a decade of litigation experience across a wide range of matters, as well as from his personal experience as a trustee of a family trust.

Tyson started his exciting presentation with two very poignant questions:

“In your work, have you ever come across a document that you thought was fake, fraudulent, or a forgery?” and, “In a word or two, what made you suspect the document as false?”

Then, with the skilled utilization of Slido.com, an interactive audience participate app, Tyson guided us into the world of the slippery slope of frauds, fakes and forgeries.

He showed a grant deed signed by a client, and next to it showed the same client’s signature on a later document. The signature on the second document was significantly different from the signature on the first document. Using Slido, he asked us to decide if the second signature was fake.

Most thought the signature was fake. However, the second document was signed by the client in front of the attorney and therefore was legitimate. It was revealed that the client had suffered a stroke which drastically limited his ability to sign his name. That explained the extreme disparity between the two signatures.

As Tyson explained, one of the first things to consider in determining whether a signature is fraudulent is the history or back-story of the signature. Try to determine as much information about the signer and signature as possible.

Another consideration in determining a document’s validity is to view the metadata. Metadata is often referred to as data that describes other data, and helps sort and identify attributes of the information it describes. For many documents, metadata can be found by searching the “properties” of the document. That information can give details such as when a document was created, its author, when edits were made and by whom, etc. Those details have played important roles in legal cases as it provides a peek behind the curtain.

(Continued on Page 16)



Guest Speaker Tyson Hubbard, Esq., and Programs Chair Marci Frazier

Speaker Spotlight

Continued from Page 15

After asking the audience if they had any experience working with a forensic document advisor, a few raised their hands. Tyson then went to explain that role of a forensic examiner is to:

- Attempt to determine authorship or authenticity
- Conduct an unbiased, independent examination of the writing and/or documents in question.
- Consult with clients regarding best approach to present findings, i.e., full report with exhibits, declaration, verbal finding, etc.
- Consult with clients regarding opposing expert's findings and provide needed material for deposition and/or trial

Document examinations conducted by forensic examiners is to determine a document's: (1) Origin – where did it come from; (2) Production Process – how was it produced; (3) Production Source – what or who produced it; and (4) Integrity – is it genuine or fake?

Tyson indicated that there are cases in the appellate court where parties have challenged the authenticity of a document and forensic examiners are used to test such things as the toner used on a document, font styles and types, writing impressions, fiber analysis of the paper being used, etc. All of these techniques are implemented to rule out forgery, fraud or fakes.

The different types of cases where forgery may come up or may be at issues are:

- Trusts/Wills/Holographic Wills
- Elder Abuse Cases
- Real Estate Transactions
- Business Transactions/Business Agreements/Business Meeting Minutes
- Medical Malpractice
- Notary Issues
- Promissory Notes
- Government Transactions
- International Documents/Passports/Business Transactions

Tyson concluded with the following key takeaways to avoid fakes, frauds and forgeries:

- Maintain the integrity of paper documents
- Maintain a healthy dose of skepticism
- Start to get comfortable with electronic documents
- Know what facts are available to authenticate and electronic document

We are grateful to Tyson for presenting this valuable information to our group.

July 21, 2022 Membership Meeting



Vice President Crystal Rivera



New Member Inductee
Michelle Welch



Jonathan Shisler and Kassy Vasquez of A2Z
Attorney Service, and Margarita Jakovas



Guest Speaker Tyson Hubbard, Esq., and
Parliamentarian Dawn Willis



SLSA Meeting Attendees



Guest Speaker
Tyson Hubbard, Esq.



SLSA Meeting Attendees

Vendor of the Month

We had the pleasure of having Jonathan Shisler and Kassy Vasquez from A2Z Attorney Service (A2Z) as our July Vendor of the Month. Jonathan is the owner of A2Z and he has more than ten years in the business. Kassy is the HR Manager and on-site Notary. A2Z is headquartered in Sacramento but serves the Nation.

A2Z provides the following services:

- Service of Process: GPS and photo evidence; real time update; customizable instructions; servers in all 50 states.
- Levy Packages: wage garnishment packages; bank levies; third party levies.
- E-Filing, Court & Secretary of State: court filings; corporate/LLC filings; research; records.
- Investigations: skip-tracing; backgrounds; stake-outs.
- Medical Records: service of subpoenas; medical records pickup; on-site scanning.
- In-house Notary.

Set up an Account and add new users any time. Completed Proofs of Serve are available on-line 24/7! So, if you're preparing briefing after hours or on the weekend and need your PoS as an exhibit, you can access it any time from your Account portal. Need a Certified Shorthand Reporter? A2Z has a very good relationship with Lori Pinkerton, a court reporter with 40 years of experience. A2Z has very competitive pricing. For service of process, each service charge includes six attempts per address.

A2Z is also offering a limited special:

- For SLSA members or to any firm that is referred to A2Z by an SLSA member: the first 10 orders are free, no limitations as to type of service. Only fee advances, if any, will be charged.
- For SLSA members or to any firm that is referred to A2Z by an SLSA member: 10% discount for the first month, no limitation on the services provided, which is in addition to the first 10 free jobs.
- There is an additional possible discount of 10% that applies to any firm that recommends A2Z to their colleagues. For example, if you make a recommendation and they use A2Z regularly, A2Z will be taking an additional 10% off of your bill as well. It is A2Z's way of saying thank you for referring them to your friends and colleagues. This can be earned as many times as A2Z retains new firms that use them on a regular basis. If A2Z receives 10 new firms based upon your referral, A2Z will discount 10 months at 10%.

These are amazing deals! If you haven't used A2Z, give them a try. With these discounts, what do you have to lose – you only save money for your clients/firm! We thank Jonathan and Kassy for taking the time to join us at our July meeting and for being an SLSA Vendor Partner. Contact Jonathan or Kassy at Serve@A2ZAttorneyService.com or (916) 436-5484.





Governor's Report

By Corene Rodder, SLSA Governor

I was so pleased to attend our July dinner meeting and learn about the three "Fs" from Tyson Hubbard. We had great fun and learned a lot about Fakes Frauds & Forgeries. It was good to see everyone, and I was thrilled that we inducted THIRTEEN new/returning members.

I hope everyone received and had a chance to review all of the proposed changes to LPI's bylaws and standing rules. The membership at SLSA's July dinner meeting voted to send the governor uninstructed to the August conference to vote on the first set of changes to the LPI bylaws and standing rules that President Rod Cardinale, Jr., has proposed to facilitate the restructuring of LPI's education programs. I will be voting in favor of the changes proposed. Please email me at governor@slsa.org if you have any questions.

Speaking of conferences, SLSA is looking forward to co-hosting LPI's November 2022 Quarterly Conference at the Hilton Arden West, November 11-13, 2022, with Placer County LPA. We will need many hands to help us follow the yellow brick road . . . So, brush off your ruby slippers, and come and join the fun! Please see the flyer in this issue. I hope you can save those dates. Let us know if you can help. Send Crystal Rivera or me an email at vicepresident@slsa.org or governor@slsa.org.

Please email me or use the CAPs Form on www.SLSA.org if you attend webinars, participate in other association's events, sign up for the Legal Specialization Sections, or go to conferences, etc. We want to make sure we track all of our Chapter Achievement Points.





NATIONWIDE LITIGATION SUPPORT SERVICES

SARAH KENNEDY
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U.S. Legal Support was founded in 1996 with the goal of becoming the first nationwide, all-inclusive litigation support company. Nearly three decades later, we're uniquely equipped to handle both the volume and complexity litigation creates. With on-demand access to **12,000+** offices in more than **2,700** cities across the country and robust digital infrastructure, we'll accommodate your litigation support needs quickly, comfortably, and safely from anywhere in the country.

Here's what we provide:

COURT REPORTING



- Working relationships with **5,000+** independent court reporting professionals nationwide (and growing!)
- U.S. Legal Support handles **350,000** depositions annually
- Remote, in-person, or hybrid proceedings
- Complete virtual deposition solution including digital exhibit storage and sharing
- SOC 2 Type 2 and HIPAA compliant Client Portal

RECORD RETRIEVAL



- U.S. Legal Support retrieves **27,000,000+** pages of records annually (over **400,000** requests each year!)
- Over **1,100,000** established provider relationships
- HIPAA compliant retrieval process
- Secure Client Portal for 24/7 access to easily request, track, manage, and view records (including X-rays)
- Robust digital infrastructure and expediting teams in each time zone

INTERPRETING & TRANSLATIONS



- Network of **5,000+** certified and qualified interpreters with minimum of 5 years' legal experience
- Support for **200+** languages
- In-person and remote capabilities
- Expertise in technical terminology, slang and other nuances of regional dialects
- Certified and non-certified document translations

LITIGATION CONSULTING



- Experienced consultants collectively bring over 500 years of experience consulting on **20,000+** trials, mediations, and arbitrations
- Experience in **3,800+** venues nationwide
- Early case assessments, mock trials, focus groups, trial strategy and consulting
- Online jury research and surveys
- Legal graphic and demonstrative creation with over **6,000,000** trial graphics produced

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CCLS Quiz: Family Law

True or False

1. ___ The first day a divorce may become final in California is 12 months after the date of filing of the petition for dissolution.
2. ___ In California, property that is brought by each individual into the marriage (not acquired together during the marriage) is called separate property.
3. ___ Both parties must agree to the divorce in order to dissolve the marriage.
4. ___ Bifurcation is the process of designating the parties' separate and community property.
5. ___ There are only two grounds for divorce in California - - irreconcilable differences and incurable insanity.
6. ___ In California, a marriage must be consummated in order to be considered valid.
7. ___ In California, child custody is determined by the wishes of the child.
8. ___ Visitation is not contingent on child support.



Scott Herman
WebEditor Design Services, Inc.
www.webeditor.com
716-694-9992

LPI Code of Ethics



It shall be the duty of each member of Legal Professionals, 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 in memory of Joan M. Moore, PLS,
CCLS, LSI President 1980-1982*



Parliamentarian's Piece

By Dawn Willis, SLSA Parliamentarian

What Is Parliamentary Procedure?

What is parliamentary procedure? Simply put: It is a set of rules for conducting business at meetings and public gatherings. Originating in early English Parliaments, parliamentary procedure has a long history, and coming to America with the first European settlers. It became uniform in 1876, when Henry M. Robert published his manual on Parliamentary Law. Today, Robert's Rules of Order, 12th Edition, published by Henry M. Robert III (keeping it in the family), is the basic handbook of operation for many clubs, organizations, and other groups (including SLSA).

Parliamentary procedure is important because it allows everyone to be heard and to allow decisions to be made without confusion. It involves democratic rule, flexibility, protection of rights, a fair hearing for everyone, and can be adapted to fit the needs of any organization. It is important for everyone (not just board members) to know the basic rules of parliamentary procedure!

To begin with, a meeting needs a fixed agenda, or order of business, is generally followed by organizations that use parliamentary procedure. If a quorum is present, the chair calls the meeting to order. Before conducting any new business, a record of the previous meeting must be approved. In other words, the Minutes from the previous meeting must be adopted into the record. Officers and standing (permanent) committees may provide a report on their activities. Special (temporary) committees can report next on the tasks for which they were created. If there were any special orders (important business previously designated for consideration at this meeting) are entertained next. This is followed by unfinished business that has come over from the previous meeting, any new business, announcements, and finally adjournment.



Legal Procedures

Preparing for Trial: The Other Checklist

When it comes to trial preparation, we're all familiar with the famous "100 Days Before Trial" checklists that tell us what documents have to be filed by certain dates, when information exchanges have to take place, making sure trial binders are put together, etc. However, there is another checklist you need to make sure is in your trial toolbox that will ensure you and your trial team have all the logistical and finer details covered. Your team will appreciate you taking the lead and being proactive in handling these tasks so that they can focus on the bigger picture and trial strategy.

- Meeting with Clients – Set up a meeting with the trial team and the clients to go over expectations, pros and cons, costs, and all available options.
- Begin Booking Offices and Accommodations – Hotel room blocks. Who needs accommodations? (All attorneys? Support staff? Clients? Witnesses/Expert Witnesses? Vendors?) Do you need a “war room” at the hotel or at the local court reporter’s office? Do you need meeting rooms? Can local counsel assist with meeting rooms?
- Will everyone need to be there the entire duration of trial?
- Remember, cases settle, so make sure any reservations can be canceled without penalty, if possible.
- How close are the accommodations to the courthouse?
- Do you need to arrange transportation (i.e., to the trial city, to and from the airport, to and from the courthouse, etc., do witnesses need to be picked up and brought to the courthouse or other location, etc.?)
- What Vendors Will Be Needed – Printing companies for exhibit preparation (posters, display boards, photo reproduction, document reproduction, etc. - - use local company and transport to trial? Is there a company near the trial location in the event of additional needs or damage to originals?), audio-visual tech/assistance for A/V presentations during trial (reputable, has trial experience, willing to travel or use vendor in trial location?), court reporter (is there a court reporting agency at the trial location with the most updated technology – real-time reporting, dailies deliveries, etc., or do you need to arrange for a reporting agency with those capabilities that can travel?). Are your vendors willing to be on call for the duration of the trial?
- A/V Equipment – Who is using it/running it? Is it your own equipment or rental equipment? Does the person who will be using it have experience doing so? What tech support does the court have available? Don't set yourself up for surprises - - DO A PRACTICE RUN BEFORE THE START OF TRIAL. Have a tech on standby to assist or consider hiring a trial tech vendor.

(Continued on Page 24)

Legal Procedures

Continued from Page 23

- Meals – Do meals need to be arranged for the trial team, for meetings, for clients/witnesses, juries? What restaurant/market options are near the courthouse and the hotel? Can you arrange for an Instacart or grocery delivery to the hotel for items such as bottled water, non-perishable snacks, fruit, etc.?
- Is There an Office Supply Business Near the Hotel or Courthouse – Staples, Office Depot, Walmart, etc., where office supplies can be readily purchased if need be?
- Mail/Overnight Delivery Services – Is the trial being held in a remote location? Is there overnight delivery available in the event something needs to be expedited to the trial team?
- The Courthouse – Has anyone on your trial team been to the assigned courthouse/department before, or is this a new location for them? Where are the electrical outlets in the assigned courtroom for purposes of plugging in A/V equipment, laptops, etc.? Do you need extension cords, extra batteries? Does the court have “dark days” or half-days?
- Consider Using a Shared Project Management Software Platform for the Trial Team – Such as Trello or a similar program that allows team members to update tasks, assign new tasks, track status, enter completed items, etc.
- Create a Trial Contacts List and a Witness Contact List for the Trial Team – Make sure the information is accurate and the contacts on each list are notified that they should be prepared to receive calls/texts/emails from the trial team at any time during the duration of the trial. This list is a LIFESAVER!
- Last But Not Least – Prepare for the unexpected and be ready to adapt to changes in trial.

The Podium Legal Blog



Stay up to date with the latest court updates and legal industry news:

<https://www.legalprofessionalsinc.org/lpi-blog/>



Sacramento Legal Secretaries
Association Presents

Beginning Legal Professionals 10-Week Online Training Course

October 5 - December 14, 2022
(Wednesdays) 6-8 PM

Live Sessions Via Zoom

www.slsa.org



About the Course

This is a live, online, ten-week course covering California state court practice and procedures, as well as law office best practices and ethics for the legal support professional. It is designed for beginning-level students or for those who could use a refresher in basic legal support training. Previous work experience in an office or law office setting is **strongly** recommended.

**REGISTRATION
OPENS**

September 6, 2022

Cost

\$275.00 SLSA Members

\$325.00 Non-Members

Forms of Payment Accepted: Check, Money Order/Cashier's Check, or Credit Card (convenience fee applies to credit card payments)

Includes course fee, Law Office Procedures Manual, all training materials, and one year of membership¹ in Sacramento Legal Secretaries Association and Legal Professionals, Inc. (¹ applies to those who are not already members of SLSA)

Topics Covered

- Court Structure, Best Practices, and Ethics
- Civil Litigation
- Discovery
- Calendaring
- Corporate Law
- Citations
- Family Law
- Probate/Estate Planning
- Real Estate/Unlawful Detainer

SACRAMENTO LEGAL SECRETARIES ASSOCIATION
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*Bosses'
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October 20, 2022
6:15 PM - 8:00 PM
Black Bear Diner
2700 El Centro Road, Sacramento

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www.slsa.org/events

Upcoming LPI Conferences

Second Quarterly Conference
November 11-13, 2022
Hilton Arden West - Sacramento, CA
Co-Hosted by Placer County LPA
and Sacramento LSA



Third Quarterly Conference
February 24-26, 2023
San Mateo Marriott - San Mateo, CA
Hosted by San Mateo County LPA



Answers to CCLS Quiz

1. False
2. True
3. False
4. False
5. True
6. False
7. False
8. True



**PLACER COUNTY LEGAL PROFESSIONALS ASSOCIATION
AND
SACRAMENTO LEGAL SECRETARIES ASSOCIATION
PRESENT**

**FOLLOW THE YELLOW BRICK ROAD . . .
LEGAL PROFESSIONALS, INCORPORATED 2nd QUARTERLY CONFERENCE**

Joint Venture Partner  **FIRSTLEGAL**

**November 11–13, 2022
HILTON ARDEN-WEST, 2200 Harvard Street, Sacramento, CA 95815**

CONFERENCE REGISTRATION FORM

NAME: FIRST _____ LAST _____
 NAME (AS IT WILL APPEAR ON BADGE): _____
 MAILING ADDRESS/CITY/STATE/ZIP: _____

 HOME TELEPHONE: _____ WORK TELEPHONE: _____
 EMAIL ADDRESS: _____
 LOCAL ASSOCIATION (DO NOT ABBREVIATE): _____ LSA LPA
 PLEASE CHECK IF APPLICABLE (INCLUDE TITLE): [check one]
 STATE OFFICER: _____ STATE CHAIRMAN: _____
 PRESIDENT GOVERNOR CCLS PLS

SCRIP TICKET (INCLUDES REGISTRATION, BOTH CONTINENTAL BREAKFASTS, ROUND TABLE LUNCHEON AND BANQUET):

POSTMARKED ON OR BEFORE October 11, 2022 ___ @ \$176.00 \$ _____
 POSTMARKED ON OR AFTER October 12, 2022 ___ @ \$186.00 \$ _____

INDIVIDUAL TICKETS:

REGISTRATION ON OR BEFORE October 11, 2022 ___ @ \$30.00 \$ _____
 REGISTRATION ON OR AFTER October 12, 2022 ___ @ \$40.00 \$ _____
 HOST ASSOCIATION'S GAME NIGHT (FRIDAY)
 (NOT INCLUDED IN SCRIP TICKET) ___ @ \$25.00 \$ _____
 CONTINENTAL BREAKFAST (SATURDAY) ___ @ \$33.00 \$ _____
 ROUND TABLE LUNCHEON (SATURDAY) ___ @ \$35.00 \$ _____
 BANQUET (SATURDAY): [check one] ___ @ \$60.00 \$ _____
 CHICKEN ROSEMARY SLICED BAKED HAM VEGETARIAN RAVIOLI
 CONTINENTAL BREAKFAST (SUNDAY) ___ @ \$33.00 \$ _____

TOTAL AMOUNT PAID: \$ _____

SPECIAL DIETARY REQUEST (INCLUDING VEGETARIAN): _____

MAKE CHECKS PAYABLE TO: 2022 NOV. CONF. FUND

SEND TO: CORENE RODDER, C/O SOMACH SIMMONS & DUNN, 500 CAPITOL MALL, SUITE 1000, SACRAMENTO, CA 95814
OR

REGISTER ONLINE: WWW.SLSA.ORG—A PAYPAL/CREDIT CARD CONVENIENCE FEE WILL BE ADDED TO YOUR TOTAL

~~NO REFUNDS AFTER October 11, 2022~~

Benefits

Note: This list is maintained for use by members of Legal Professionals, 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. For information, call these representatives directly. For questions and concerns regarding Member Benefits, please contact the LPI Vice President at vicepresident@legalprofessionalsinc.org.

LEGALSHIELD/IDSHIELD

Contact: Courtney Coats, Independent Associate. (925) 580-6446
coats8@legalshieldassociate.com
LegalShield offers legal, identity theft protection, along with a massive Perks Program with significant savings to over 500 local and national companies.

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Law Office Products & Management

Six Traits You Need For Effective Law Firm Management

By Erika Winston*

Management of a law firm is no easy task. Not only are you dealing with the expectations of demanding clients, you are also handling the financial, ethical, and administrative demands of keeping your law office up and running. Effective law management is key to the profitability and longevity of a legal practice. Without it, necessary tasks and responsibilities can go unmet, leading to financial and ethical challenges.



The successful management of a law office is characterized by some specific traits. While each of these attributes is important in and of itself, it takes all of them to truly cultivate a successful legal practice.

Effective Leadership

Success starts at the top. Every member of the firm looks to leadership for guidance on how to conduct themselves when handling office business. Firm leaders need to provide a positive example for lower level attorneys and staff members to follow. Whether heading a staff meeting or speaking with clients, firm leaders are constantly being watched and emulated.

Ineffective and incompetent leadership can have an extremely negative effect on the entire firm, leading to such problems as:

- High staff turnover rates – Poor leadership often leaves employees feeling dissatisfied and unheard. Rather than deal with a negative environment, they choose to leave for employment elsewhere. High turnover rates can be costly for a firm. You lose valuable experience and knowledge, while having to spend extra money on hiring and training new employees.
- Poor client relationships – Poor firm management spills over into client relationships. When leaders are not providing adequate oversight to lawyers or paying attention to the level of service being provided, attorneys and staff members may fail to meet their responsibilities to clients. Telephone calls may go unanswered and important appointments may be missed. Poor client relationships can mean the end a legal practice.
- Lack of firm direction – Direction comes from the top. Part of the leadership role is creating objectives for the firm and developing a path to meet those long-term goals. After all, if you don't know where you are going, how are you ever going to get anywhere?

(Continued on Page 31)

Law Office Products & Management

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Administrative Support

Law firms are just as dependent on administrative tasks as they are on client matters. There must be people and processes in place to ensure that administrative responsibilities are handled in a timely, accurate, and efficient manner. This entails hiring support staff members who have adequate knowledge and experience to handle the tasks assigned to them. You also want to ensure that staff members have a temperament that fits

into the culture of your firm. Effective law firm managers understand that the right administrative staff is a valuable asset to their legal practice.

Adequate support also requires systems that proficiently handle your administrative needs, without draining your time or financial resources. Legal billing software such as TimeSolv is one such system. Not only does it provide convenient and easy time tracking, but it also gives your staff with the ability to create quick and accurate client invoices. Using cloud-based technology, these programs help your firm handle administrative tasks efficiently and economically.

Adequate Planning

As I said before, firm growth requires proper planning. You will not become successful by simple luck. Most clients don't just happen to walk through the door, and money doesn't just fall into your bank account. You need to establish concrete goals for the firm and develop a plan for reaching them. The most successful law firms have plans for growth and understand the significant challenges that exist within a legal marketplace that is constantly changing and evolving. With a strategic plan, you can prepare for possible roadblocks and position your firm to best deal with fluctuations in the industry.

Client Services

I touched on this earlier, but let's dive in a little deeper. A well-run law firm consistently provides excellent customer service to each of its clients because successful practice management spills over into successful client services. This happens for a couple of reasons:

- Effective management creates a culture of high customer service. Attorneys and staff members recognize these expectations and work hard to meet them.
- Effective law firm management includes mechanisms to ensure that time is accurately tracked, so clients are billed correctly. This type of practice cuts down on client complaints. There are also processes in place to promote adequate client communications and efficient use of time to complete client tasks.

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Law Office Products & Management

Continued from Page 31

Proficient Marketing Plan

Marketing is the cornerstone of any successful business. How can you attract clients if they don't know that you are there and what you have to offer? Effective practice management must include a marketing strategy that grows the firm, or at least maintains its profitability. A well-rounded marketing plan includes a web and social media presence, along with traditional marketing tools like television and/ or radio. Learn where your ideal client would likely look for an attorney and make sure you are available to be found. Effective law firm managers know that, if they are unsure about the best marketing direction, professional legal marketing firms are available for contract and assistance.



Effective law firm managers know that, if they are unsure about the best marketing direction, professional legal marketing firms are available for contract and assistance.

Regular Review

Effective law firm managers keep a constant eye on the firm's health. These managers want to recognize issues before they turn into crippling problems and they know that this requires routine review of various metrics, including those that measure:

- Profitability
- Client satisfaction
- Billable hours
- Overhead costs
- Invoice payment
- Trust account balances and transactions

Effective law firm managers also know that legal software programs make these regular reviews easy to conduct. Effective management doesn't just fall into place without some effort on your part. Look at these common traits and identify any gaps you may have in your current management processes. Then, take the steps to fill them so you can proactively work to improve the health of your legal practice and ultimately increase your law firm profits and productivity.

**This article originally appeared as a blog piece for TimeSolv. Erika Winston is a freelance writer with a passion for law. Through her business, The Legal Writing Studio, she helps legal professionals deliver effective written messages. Erika is a regular contributor to a variety of other publications.*

Employment Report

The following is a snapshot of some of the employment opportunities currently listed on SLSA's website. For more information on these job listings, go to: www.slsa.org/employment/



To submit an employment ad, please email employment@slsa.org

(August 9, 2022) Litigation Secretary – Fisher Phillips

[+ READ JOB DESCRIPTION](#)

(August 9, 2022) Litigation Paralegal – Fisher Phillips

[+ READ JOB DESCRIPTION](#)

(July 25, 2022) Legal Secretary – Corporate/Transactional - Boutin Jones, Inc.

[+ READ JOB DESCRIPTION](#)

(July 25, 2022) Legal Secretary – Real Estate/Transactional - Boutin Jones, Inc.

[+ READ JOB DESCRIPTION](#)

(July 22, 2022) Litigation Secretary - Boutin Jones Inc.

[+ READ JOB DESCRIPTION](#)

(July 22, 2022) Litigation Secretary - Daponde Simpson Rowe PC

[+ READ JOB DESCRIPTION](#)

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Crystal Rivera

Marci Frazier

Benefits

Vacant

Bulletin Editor

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California Certified Legal Secretary (CCLS)

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November 2022 Conference Committee

Crystal Rivera

Corene Rodder

We'd love to have you on the team! Please contact President Lynne Prescott, CCLS, for more information at president@slsa.org

Membership Application

Applications may also be downloaded at <https://www.slsa.org/pdf/Membership-NEW-Application-2022-23.pdf>

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 PROFESSIONALS, 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 PROFESSIONALS, 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)***

SLSA ACTIVE MEMBER* (Annual Dues \$50): 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, my initiation fee, and Legal Professionals, Incorporated (LPI) per capita tax.*

LPI and SLSA STUDENT MEMBER (Annual Dues \$25):** Persons currently enrolled in an educational program leading to employment in the legal profession may maintain such Student Membership while thus enrolled. Student Members are considered an Active Member for purposes of LPI contests and have all the rights of an Active Member of LPI but are not eligible for elected or appointed office of LPI and may not serve as Governor or delegate of a Local Association. LPI student members are eligible for SLSA and LPI scholarships. *Dues include local dues, my initiation fee, and LPI per capita tax.*

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

** STUDENT/ASSOCIATE MEMBERS MAY NOT VOTE, AND MAY NOT BE ELECTED TO OFFICE. STUDENT/ASSOCIATE MEMBERS MAY SERVE ON COMMITTEES.

*** SLSA Membership Period: May 1 - April 30. The fee for Active Membership applications received after October 31 is prorated at \$30.00.

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 - Specify: _____ |
| <input type="checkbox"/> Bankruptcy | <input type="checkbox"/> Litigation | |
| <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 (Please check only one)
(This includes publications of *The Legal Eagle* and *The Legal Secretary*)

REGULAR MAIL PREFERENCE? BUSINESS RESIDENCE (Please check only one)

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

Renewal Form

Renewals may also be completed online at <https://www.slsa.org/members-only/membership-renewal/>



Sacramento Legal Secretaries Association MEMBERSHIP RENEWAL APPLICATION

Membership Period: May 1, 2022 – April 30, 2023

Due Date: May 1, 2022

(This application is for renewing members only. You are a renewing member if you were an active member between May 1, 2021 and April 30, 2022. If you were not active during this time period, please complete the "Application for Membership in Sacramento Legal Secretaries Association" which can be found on our website at www.SLSA.org/Membership.)

Make check payable to:

Sacramento Legal Secretaries Association

SLSA and LPI Membership Due: \$50

LPI and SLSA Student Membership Due: \$25

LPI and SLSA Associate Membership Due: \$25

A late fee of \$5 will be assessed for applications received after July 1, 2022

Return the completed application and full payment to:

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Sacramento Legal Secretaries Association

c/o Somach Simmons & Dunn

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Sacramento, CA 95814

MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

NAME: _____

ARE YOU A CCLS? _____

BIRTHDAY: _____

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Labor and Employment

Litigation

Real Estate

Bankruptcy

Environmental

Law Office Management

Personal Injury

Other: _____

MAILING/LISTING INFORMATION:

Where do you want your SLSA/LPI mail delivered? (check one)

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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: _____
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TEAM



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The officers for the 2022-2023 term are committed to offering you the best opportunities for continuing legal education and professional networking in the Sacramento Valley area. Please let us know if there is any way we can assist you.



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Service of Process

Counties/Location/Entity Routine	
CSC/Paracorp and CT Corporation	\$35.00
Zone 1 (Los Angeles, Placer and Sacramento Counties)	\$44.00
Zone 2 Nationwide (Covers most of California, Urban and high-volume areas)	\$65.00
Zone 3 Nationwide (Rural and lower volume areas)	\$75.00
Zone 4 Nationwide (Rural)	\$85.00
Zone 5 Nationwide (Extremely rural, varies on case-by-case basis) ~	
* 6 Attempts per address included with each service charge. *	
Rush (attempt every 48 hours) is an additional \$20.00	\$20.00
ASAP (attempt every 24 hours) is an additional \$30.00	\$30.00
Special (immediate attempt/ special circumstances) is an additional \$60.00	\$60.00
Printing (first 25 pages are free) \$.15 per page	\$0.15

Bank Levy and Earning Withholding Orders

E-filing Levy Package (for Sacramento only)	\$65.00
Levy Packages Zone 1 (Includes opening the levy, serving, filing the proof)	\$75.00
Levy Packages Zone 2 (Includes opening the levy, serving, filing the proof)	\$85.00
Levy Packages Zone 3 (Includes opening the levy, serving, filing the proof)	\$95.00
Levy Packages Zone 4 (Includes opening the levy, serving, filing the proof)	\$105.00

California Secretary of State

Counties/Location/Entity	
Secretary of State - Submitted same day if received by 1:30pm	\$40.00
Secretary of State immediate filing - Must be received by 3pm	\$80.00
* Secretary of State fees are not included *	

Court Services

Counties/Location/Entity Routine	
E-Filing \$15.00	\$15.00
Zone 1 (Los Angeles, Placer and Sacramento Counties)	\$40.00
Zone 2 (Yolo, El Dorado, Yuba, Sutter, Orange)	\$50.00
Zone 3 (Most other courts)	\$65.00
Rush (after 12PM and received by 2PM)	\$20.00
Printing 0.15 per page	\$0.15

On-Site Copying (Medical, Court, Etc.)

Counties/Location/Entity Routine	
Sacramento and Placer Counties	\$44.00
Yolo, El Dorado, Yuba, Sutter	\$65.00
Rush (To be completed in under 48 hours)	\$20.00
ASAP (To be completed same day) is an additional \$30.00	\$30.00
Special (immediate attempt/ special circumstances) is an additional \$60.00	\$60.00
Scanning / Copy time (first 30 minutes covered in base price) \$40.00 per hour	\$40.00
Printing (Physical Copies) \$.15 per page	\$0.15
Digital copies only \$.05 per page	\$0.05

Other Services and Charges

Waiting time \$40.00 per hour	\$40.00
Fee / Check advance (10% unless reimbursed within 5 business days)	\$5.00
Notary	\$15.00
Copy charges	\$0.25
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