

THE LEGAL EAGLE

Book 23, Issue No. 2

JULY 2022



Summer Court
Series!

NEW STATE
DISCOVERY AND
BLST COURSES

Project
Management
and Trial
Management
Tools

What's Your
Job Title?



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.

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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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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

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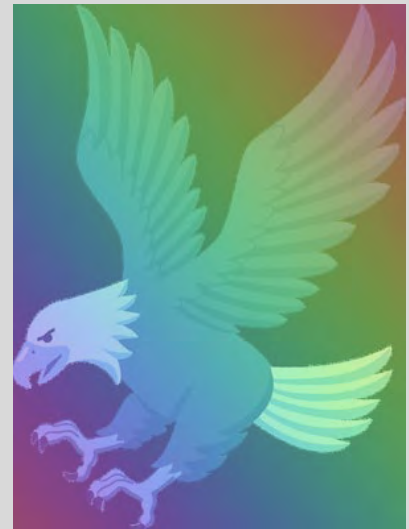
JULY 2022

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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, July 21, 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

FAKES FRAUDS & FORGERIES

How to Protect Yourself Against the F-Words

Guest Speaker:

Tyson Hubbard, Partner

Downey Brand LLP



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, July 19, 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:

Crispy Chicken Bacon Ranch Wrap

Diced crispy chicken strips with salad mix, red onion, diced tomato, avocado and ranch dressing wrapped in large tortilla

Turkey Club

Triple-decker stacked with roasted turkey breast, bacon, ham, tomato, lettuce & mayo

Shasta Cheeseburger

Cheddar cheese, lettuce, onion, tomato, mayo, 1000 Island dressing

Veggie Burger

Lettuce, onion, tomato, mayo, 1000 Island dressing

Salad

Crispy chicken cobb salad OR tuna chef salad OR garden salad

Thank You to our July Vendor Partner



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*



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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 all of our
Vendor Partners!**

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!



Congratulations to ...

CORENE RODDER! Corene is the lucky winner of a \$50 Amazon Gift Card for participating in the SLSA Feedback Survey.

Congratulations, Corene!



President's Message

By Lynne Prescott, CCLS, SLSA President

You're Doing It!

Thank you so much to those of you who have renewed your membership! It is truly encouraging to see the association coming back to life and to see you returning to the in-person meetings. I've seen faces in the last couple of months that I haven't seen in a long time, and it does my heart good! You're doing it - - rebuilding and reclaiming!

Congratulations to all of SLSA's new members! We are happy to welcome so many new names and faces to the SLSA family. Check out Vice President Crystal Rivera's membership report and be sure to welcome these new members when you see them at meetings and events.

The Feedback Survey that was sent out in June has been completed, and while we would like to have had more responses, we did receive some good feedback. The Executive Board will use this information in our planning for the coming year.

Of course, any time you would like to provide feedback, comments, or suggestions, please feel free to email any of the SLSA officers.

Don't forget that SLSA was the winner of an exam fee waiver for the CCLS exam. This means that if you are a member of SLSA and you wish to sit for the September 2022 or March 2023 CCLS exam, you should notify either me or Brenda Johnson, CCLS, so that you can be considered for the exam fee waiver.

Several SLSA members have been taken ill recently because of a new outbreak of COVID and several law firms have had to send employees home to work remotely.

Please take precautions to keep yourself and others healthy and safe, as we hate to see anyone suffer at the hands of this virus. We wish a speedy and full recovery to those who are ill.

Please join us on July 21 as we welcome Tyson Hubbard of Downey Brand, who will be enlightening us on the subject of the dreaded F-Words: Fakes, Frauds and Forgeries. We also hope to have more details about the SLSA Summer picnic, so you won't want to miss out on that. And don't forget that our BOGO membership promo is still running, and we have great gifts for guests and member sponsors!

There are quite a few new job listings on the employment board. If you know anyone who may be interested, please pass the word along.

Finally, if your office is project or trial heavy, you'll want to take a look at the Law Office Products & Management Article on page 29. We all want to work smarter, not harder, and there are always tools out there to help make that possible.

A handwritten signature in blue ink that reads "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.

LPI's First Quarterly Conference



DoubleTree by Hilton
Anaheim/Orange County
100 The City Drive, Orange, CA 92868

It's time to make your reservations for LPI's 1st Quarterly Conference in Orange, California. **At this conference, we will be introducing a new schedule for conference that will shorten the business portion of the conference and allows more time for educational opportunities and networking.** You don't want to miss it!

There will be Zoom access to the Board of Governor's Meeting. If you attend via Zoom, you can listen but not communicate with those attending in person. The Zoom link will be sent out a couple of days before the Board of Governor's Meeting.

SIX educational seminars will be presented over the weekend to get those CCLS and MCLE credits! If you can't attend the conference in person, don't worry, as the educational seminars will also be available via Zoom.

Attention all Vendors and Exhibitors. We have vendor spaces available and would love to see you in Orange! Please contact LPI Advertising Chair Heather Nowak, if you are interested, at advertising@legalprofessionalsinc.org. *See more info below.*

Sign up NOW! We hope to see you all in August at the Doubletree by Hilton in Orange. Please don't hesitate to reach out with any questions.

A registration information graphic with a green background and a white yard line. It features a football on the left and a blue helmet on the right. Gold streamers are scattered around the text. The text includes: "Legal Professionals, Inc. and Orange County Legal Professionals Association are proud to co-host LPI's First Quarterly Conference", "August 12-14, 2022", "Touchdown to Education!", "HOTEL REGISTRATION INFORMATION", "DoubleTree by Hilton Anaheim/Orange County 100 The City Drive, Orange, CA 92868", "Reservations - Click here. Self-Parking is \$8/day", "Single/Double - \$139 (Plus applicable taxes and fees)", "Group Name: Legal Professionals", "Check in: 4:00 pm", "Check out: 11:00 am", "Deadline to reserve your room is July 11, 2022. No room rate guarantee after this date!", "Your reservation includes wireless internet access and a discounted self parking rate of \$8 per day.", "Located just 4 miles from Disneyland, the hotel offers firework views and an Anaheim Resort Transportation (ART) shuttle to the parks for a fee. Angels Stadium, Anaheim Convention Center, Honda Center, and Chapman University are less than a 10-minute drive from the hotel. Dine in one of the three restaurants, cool off in their outdoor pool, and enjoy a warm chocolate chip cookie on arrival.", "Need more info? Please contact us: Kim Oreno (kim@legalprofessionalsinc.org) / 916.239.4089", "LPI logo: Elevating California's Legal Professionals", and "FL FIRSTLEGAL Joint Venture Partner logo".

Register Online:

<https://www.legalprofessionalsinc.org/august-12-14-2022-conference-registration/>

In Person Meetings are Back

And We've Got a New Location!

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."



Membership Renewal



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

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

Dates to Remember

July 12, 2022
6:00 PM

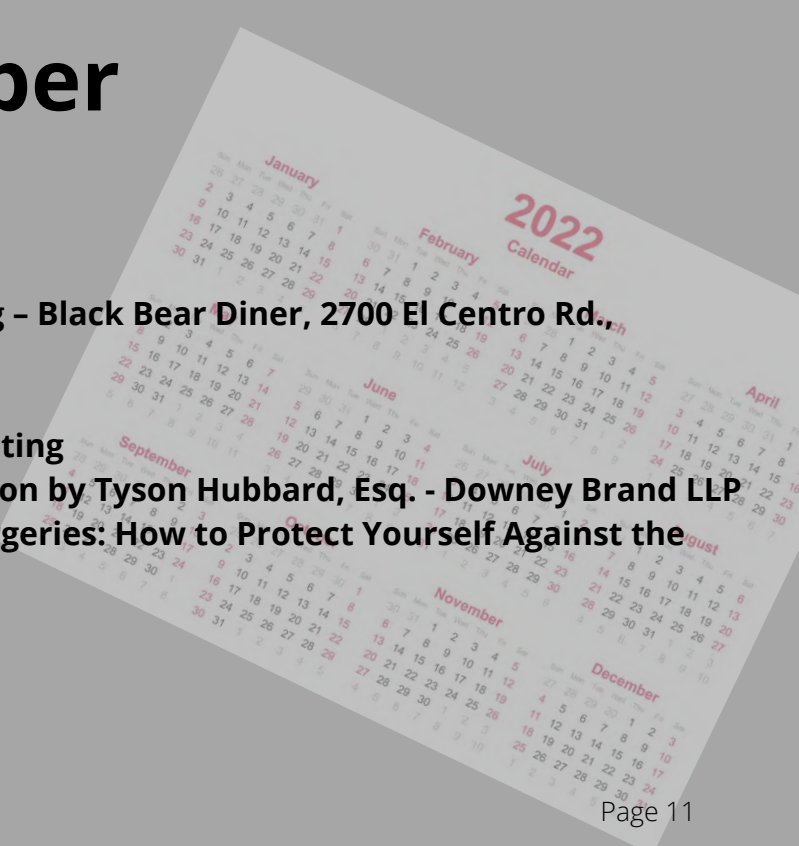
Executive Board Meeting
Location TBA

July 21, 2022

SLSA Membership Meeting - Black Bear Diner, 2700 El Centro Rd.,
Sacramento

5:30 PM
6:15 PM

- Meet & Greet
- Dinner & Business Meeting
- Educational Presentation by Tyson Hubbard, Esq. - Downey Brand LLP
"Fakes, Frauds, and Forgeries: How to Protect Yourself Against the F-Words"





Member News

Crystal Rivera, Vice President

Welcome, and congratulations to the following new SLSA members who were inducted at the June 16, 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.

Abiola Ajayi – Abiola is an Office Service Clerk at Murphy Austin Adams Schoenfeld, LLP. She has been a legal professional since March 2021. She enjoys reading, painting, crafts, movies, and being with her husband and kids. She celebrates her birthday on April 28.

Jakob Duran – Jacob is self-employed at Duran Legal Services. He has been a legal professional since 2019. He enjoys health, golf, law. He celebrates his birthday on May 31. He is currently a third-year student at Northwestern California University School of Law.

Amy Freeman – Amy is the Office Manager at Braun Blasing Smith Wynne, P.C. She has been a legal professional since 2000. She enjoys running, dogs and gardening. She celebrates her birthday on August 4.

Linda Gerst – Linda is a Legal Secretary at Stoel Rives LLP. She has been a legal professional since 1980. She celebrates her birthday on December 8.

Katelyn Hoffman – Katelyn is a Paralegal at Demas Law Group, P.C. She has been a legal professional since 2015. She enjoys reading (including proofreading), playing guitar and ukulele, and baking. She celebrates her birthday on April 16.

Tammy L. Hunt – Tammy is a Subrogation Supervisor at George Hills Company. She has been a legal professional since 1995. She enjoys her grandchildren and camping. She celebrates her birthday on February 20.

Margarita Jakovas – Margarita is a Legal Assistant at Diepenbrock Elkin Dauer McCandless LLP. She has been a legal professional since 1990. She celebrates her birthday on August 29.

Debbie Jordan – Debbie is the owner of Sacramento Placement Services, a legal staffing and recruiting service. She celebrates her birthday on December 10.

Craig W. Rimer, JD – Craig is the owner of Rimer Investigative Services. He is a licensed investigator, has a Juris Doctor, and has been employed in the legal field since 1996. He is an author and celebrates his birthday on November 22.

Christine Soule – Christine is Legal Assistant at Trainor Fairbrook. She has been a legal professional since 1993. She celebrates her birthday on December 24.

Member News

July Birthdays

Brenda Johnson, CCLS July 10
Angela Kolak July 13
Heather M. Rodriguez, CCLS July 15
Lori Gilmette July 18
Maryanna Rickner July 22
Pamela Anne Lee, CCLS July 22
Christie Kaelber July 28

A photograph of a round birthday cake with white frosting and a thick layer of multi-colored sprinkles. A gold, glittery topper with the words "Happy Birthday" in a cursive font is stuck in the center. The background is a plain, light-colored wall.

What's Your Job Title?

Legal Secretary? Case Assistant? Practice Assistant?
Legal Assistant? Paralegal? Legal Support Specialist?
Legal Administrative Assistant? Executive Legal Assistant?
There seems to be almost as many titles for what we do
as there are law firms out there.



But how do YOU identify as a legal support professional? Do you agree with the title you have been assigned? Does it accurately reflect the job you do and the skill set you possess? If you disagree with your current title, which title would you prefer?

Send your comments to president@slsa.org

Speaker Spotlight



By Marci Frazier, SLSA Programs Chair

On June 16, 2022, our guest speaker was Matthew W. Ellis, Esq., a partner at Downey Brand. His topic was Financial Planning Tips for Everyday Living . . . A Lawyer's Personal

Perspective. He is a skilled transactional attorney who assists clients with sophisticated legal matters and complex real estate transactions

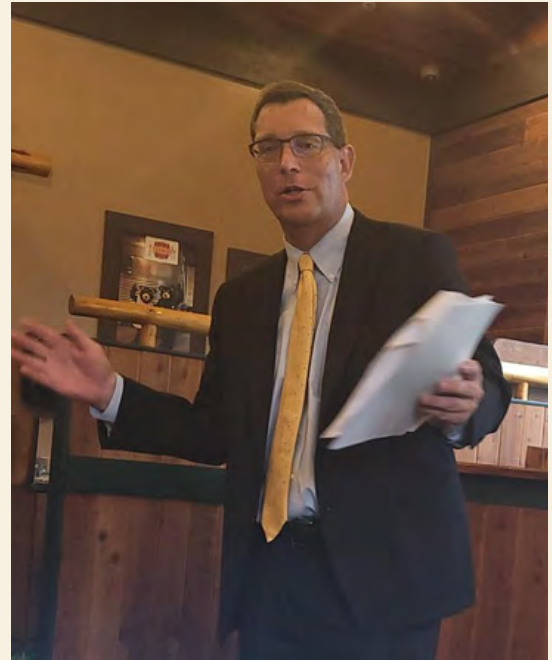
Matt began his presentation with "Non-numerical financial planning" tips. He showed the importance of preparing a binder or folder of important financial documents and contacts. The binder could include such things as:

- Bank or other financial statements
- Important contacts: attorneys, CPAs, insurance agents
- Pension statements or contacts
- Passwords to important accounts
- Will or trust documents
- Safe deposit locations and keys
- Combinations to safes

A few more non-numerical tips included:

- Regularly ensure beneficiaries are accurately stated on accounts
- Ensure will states your wishes when you pass
- Ensure you have adequate liability insurance (consider obtaining an umbrella policy)
- With respect to elderly parents, try to have one other person listed on a checking account.

Matt then began to elaborate on "numerical financial planning" tips:



Matthew W. Ellis, Esq.

- Try to have cash reserves of at least 3 months of expenses
- Create a five-year savings plan
- Try to eliminate as much debt as possible

In determining the amount needed to save monthly to achieve required savings, Matt recommended the following website: www.calculator.net. He then gave this example in using the online calculator:

- Select "Additional Contribution" tab
- Enter \$650,000 as "Your Target", the amount you currently have saved, years until retirement age and a "Return Rate" of 6% and "Compound" annually; also, the contribution should be at the "end" of each "month"

Continued on page 15

Speaker Spotlight

Continued from Page 14

- 6% annual return is viewed as a conservative estimate if you invest a portion in stock and bonds
- Rule of 72 – tells you how long it will take for your money to double
- The higher the return, the quicker your money will double

What to invest in to achieve a 6% annual return:

- Target Date Retirement Funds are very popular (these funds adjust their asset mixes automatically over time)
- Broad based stock indexes like the S&P 500 Index or the U.S. Total Stock Market Index (for the past 10 years it has averaged a 14% year return)
- Broad based bond indexes like Vanguard Total Bond Market (for the past 10 years it has averaged a 1.64% year return)
- High quality bonds (like U.S. bonds) generally return less than a broad based stock index (like the S&P 500 Index) over time as they are less risky; the less risk you take the lower your returns will be
- Be aware of costs as these will reduce your return
- Popular funds: Vanguard, Fidelity, Schwab

Matt rounded off his financial tips with the following suggestions:

- How you want to invest is a combination of your goals and your risk tolerance

- Everyone has a different risk tolerance; the goal is to find the investment balance that you are comfortable with and that you will stick to over time
- Consider engaging a financial planner – their fees are usually 1% of the assets you place with them; before you engage a broker, research them on <https://brokercheck.finra.org/>
- A good broker will help you set your investment plan and keep you on track

Finally, Matt concluded his presentation with the following references/recommendations:

- Allworth Financial Podcast – this is a weekly podcast and they answer questions posed by listeners
- Book recommendations: Automatic Millionaire by David Bach; The Millionaire Next Door by Thomas J. Stanley; A Random Walk Down Wall Street by Burton Malkiel; Baby Step Millionaires by Dave Ramsey; The Seven Baby Steps by Dave Ramsey.
- Investment accounts: Charles Schwab or Vanguard (most trades are free)
- F.I.R.E. (financial independence, retire early) movement: Read the Mr. Money Mustache blog

We are grateful to Matt for bringing such financial enlightenment to us.

June 16, 2022 Membership Meeting



Abiola Ajayi, Margarita Jakovas, Amy Freeman, and
Vice President Crystal Rivera



Guest Speaker Matt Ellis



Executive Secretary Sarah Martinez and
Parliamentarian Dawn Willis



SLSA Meeting Attendees



SLSA Meeting Attendees

Vendor of the Month

U.S. Legal Support

Our June Vendor of the Month was Sarah Kennedy, Director of Business Development at U.S. Legal Support (USLS). Sarah was prepared to give us a brief video presentation on their record retrieval platform, but unfortunately our electronics weren't compatible.

In a previous professional life, Sarah was in the Wine and Spirits Industry. She worked for brands like Miller Brewing Company, Bacardi USA, and the largest national distributor Southern Glazers. It was in 2006 when she passed the first level Sommelier exam and later in 2014 passed the exam to be a Certified Expert in wine. She definitely enjoys wine, and is already discussing possibly sponsoring a wine tasting event for SLSA members.

USLS provides court reporting, record retrieval, interpreting and translations, trial services, and transcription services. They have 5,000+ independent court reporting professionals, 5,000+ interpreters proficient in 200+ languages, 132,000+ remote events are scheduled annually, and over 27 million pages of records are retrieved annually. They have excellent trial litigation services – anything from trial graphics or animation to technology assistants to mock juries and jury consulting. They have consulted on over 20,000 trials, mediations, and arbitrations.



Sara Kennedy of U.S. Legal Support



They also have over 12,000 on-demand offices nationwide.

From discovery through trial, USLS is your all-inclusive litigation support partner.

Thank you, Sarah, for being a Vendor Partner.



Governor's Report

By Corene Rodder, SLSA Governor

I am pleased to report that LPI's Executive Committee has approved the scrip and hotel rate for the November 2022 Quarterly Conference being co-hosted by Sacramento LSA and Placer County LPA. The conference will be held November 11-13, 2022, at the Hilton Arden West in Sacramento. The scrip price is \$176 for early registration, the room rate is \$139/single or double (not including tax), and self-parking is \$4/day. Our theme is "Follow the Yellow Brick Road."

Registration is now open for the August 2022 Quarterly Conference in Orange, California. The conference will take place August 12-14, 2022, at the Doubletree by Hilton in Orange, co-hosted by Orange County LPA and LPI. The approved scrip price is \$187, and the room rate is \$139 single/double occupancy (not including tax and fees). Discounted self-parking is \$8/day, or \$28/day for valet parking. The theme is "Touchdown to Education," so it is an NFL-themed weekend. The optional Friday night social event will be a pizza and Bunco night. You can go to the LPI website to register at: <https://www.legalprofessionalsinc.org/august-12-14-2022-conference-registration/>

LPI Vice President Donna Day of Alameda County LSA has been assigned as SLSA's visiting officer for this fiscal year. We look forward to working with Donna and having her attend SLSA's events during the year.



Due to the restructuring of LPI's educational programs that President Rod Cardinale, Jr., has proposed, as well as other items that are also being considered for updating/revising, the LPI Parliamentarian has issued a comprehensive notice of proposed bylaw amendments. This notice covers items that will be presented for vote by the governors at the August 2022, November 2022, and February 2023 quarterly conferences.

The idea behind presenting the entire slate of proposed amendments at one time, although they will be voted on at stages throughout the fiscal year, is to provide the associations with ample time to discuss and consider all of the proposed amendments. The notice was distributed to all LPI members; therefore, please be prepared to discuss at the upcoming meetings so that these proposed amendments are thoroughly examined, and I am instructed on how to vote.

Lots going on and lots coming down the pike!

As always, please let me know when you attend webinars, participate in other association's events, sign up for the Legal Specialization Sections, go to conferences, etc., so that we can track our Chapter Achievement Points.

Thanks, everyone, and I look forward to seeing you at the meetings!



NATIONWIDE LITIGATION SUPPORT SERVICES

SARAH KENNEDY
Director of Business Development
U.S. Legal Support
Direct 916.799.7331
skennedy@uslegalsupport.com



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



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CCLS Quiz: Legal Terminology

Match the correct term with the correct definition.

1. ____The formal written statement by a defendant in a civil case that responds to a complaint, articulating the grounds for defense.
a. Writ
b. Statute
2. ____A serious crime, usually punishable by at least one year in prison.
c. Answer
d. Remand
3. ____Written statements filed with the court that describe a party's legal or factual assertions about the case.
e. Motion
f. Felony
4. ____A law passed by a legislature.
g. Pleading
5. ____A written court order directing a person to take, or refrain from taking, a certain act.
6. ____Send back.
7. ____A request by a litigant to a judge for a decision on an issue relating to the case.



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

Parliamentary Words and Terms

Abstain – not voting one way or the other

Adjourn – ending the meeting

Adopt – to okay or accept

Agenda – an outline of items to address at a meeting

Amendment – adding on to a motion, usually to improve it, enlarge its intent, or to make it more understandable

Appeal the decision of the Chair – to question the Chair's decision and ask the group to change it

Appoint – to place someone in a job or position

Bylaws – the rules a group has agreed to follow and the goals of the organization

Caucus – getting together outside the regular meeting to decide on plans, position, policy and/or people to nominate

Chair – the position held by the meeting's leader

Committee – a group that reviews and reports on a special task given to them by the larger membership. A committee may recommend actions to be taken based upon its findings.

General Consent – approval by the group. If even one member objects, a vote must be taken.

Majority opinion – the decision of more than half the voting members

Minority opinion – the position held by less than half of the voting members

Minutes – official record of a meeting

Motion – a member's proposal for action

Nominate – to recommend a person for election to office

Pending – still up in the air and undecided

Personal privilege – calling attention to something having to do with the well-being of the people at the meeting, such as asking to have a window opened

Point of Information – asking for more information before making a decision

Point of Order – correcting a mistake that is against the rules of the organization

Pro Tem – temporary

Proxy – permission given, usually in writing, by one member for another member to vote in his or her name

Orders of the Day – calling for the group to get back to the agenda or the main business of the meeting

Question – a motion that is under discussion with a vote to be taken on it

Recess – taking a short break

Rescind – to take back or withdraw

Resolution – usually a policy statement being suggested to the group for approval

Second – support for a motion. Before a group can handle a proposal, it must know that two people want to have it discussed.

Standing Committee – a committee that goes year-round such as a program planning committee

Suspending of the Rules – discussing something without sticking to the rules of the meeting

Veto – to turn "thumbs down" on a motion or idea

Legal Procedures



SUPERIOR COURT OF CALIFORNIA
CONTRA COSTA COUNTY

Mandatory E-Filing Beginning July 5, 2022

The Superior Court of Contra Costa County recently announced the launch of the new civil case management system Odyssey, including civil e-filing and a new public portal.

Pursuant to Local Rule 2.87 and the E-Filing Standing Order, the civil division is implementing mandatory electronic filing (e-filing) for attorneys and providing the option of e-filing to self-represented litigants. Attorneys may elect to begin e-filing as of the dates shown below.

The implementation schedule for civil e-filing is as follows:

<u>Type</u>	<u>Voluntary Date</u>	<u>Mandatory Date</u>
Unlimited Civil	June 20, 2022	July 5, 2022
Limited Civil	June 20, 2022	July 5, 2022
Civil Complex	June 20, 2022	July 5, 2022
Unlawful Detainer	June 20, 2022	July 5, 2022
Small Claims	June 20, 2022	July 5, 2022
Family Law	June 20, 2022	July 5, 2022
Department of Child Support Service (DCSS)	August 2022	August 2022

Sacramento County Grand Jury Announces Release of Their 2022 Final Report

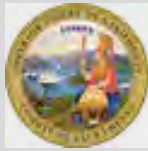
June 30, 2022 -- Deanna Hanson, Foreperson of the 2021-2022 Sacramento County Grand Jury, announced that the Grand Jury has released its final report. The Report covers items of vital importance to the citizens of Sacramento County. The 2021-2022 Grand Jury Final Report, formal responses, and news media coverage are available to the public on the Grand Jury website: www.sacgrandjury.org.

Continued on page 23

Legal Procedures

Continued from Page 22

Public Notice Criminal Division



SUPERIOR COURT OF CALIFORNIA
COUNTY OF SACRAMENTO

Effective June 1, 2022, appearances in criminal matters at the Gordon D. Schaber (Main Courthouse) located at 720 9th Street, Sacramento, CA 95814, and at the Lorenzo Patino Hall of Justice (Main Jail) located at 651 I Street, Sacramento, CA 95814, shall be in-person unless authorized by Penal Code sections 977 or 977.2. Live-streaming will continue to be available in Arraignment Night Court and can be viewed at the following link:

<https://www.saccourt.ca.gov/general/department-livestreams.aspx>.

Filing counters, Criminal Records, and clerk's offices are open and drop box filings are no longer available. Filings will continue to be accepted via United States Mail or can be submitted at the criminal front counters. All filings must follow the Court's filing guidelines and may not be emailed to departments. Any filings emailed to court departments will not be opened and/or processed. You can find the court's filing guidelines by following this link:

<https://www.saccourt.ca.gov/local-rules/docs/chapter-10.pdf>

The Podium Legal Blog



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

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



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*Educating California's
Legal Support Professionals*

NextGen → Legal

OVERVIEW OF CALIFORNIA DISCOVERY

Online Course Commencing August 2

NextGen Legal and LPI are offering this six-week, online Overview of California Discovery course. You will be able to work at your own pace.

Cost

\$125 LPI members
\$175 non-LPI members

The content of this course is designed for legal secretaries and those studying for the California Certified Legal Secretary examination or those with a basic legal background.

Each individual must register separately. Upon completion of the course, students will receive a certificate from LPI.

Classes will take place online utilizing video lectures, discussion boards, email, live Q&A sessions and quizzes. Login information will be provided the day before the class is scheduled to begin.

SOME OF THE TOPICS THAT WILL BE COVERED:

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

ONLINE REGISTRATION AND
PAYMENT AVAILABLE AT:

WWW.LEGALPROFESSIONALSINC.ORG/EVENTS/

WWW.LEGALPROFESSIONALSINC.ORG



LPI

*Educating California's
Legal Support Professionals*

NextGen → Legal

BEGINNING LEGAL SECRETARIAL TRAINING

Online Course Commencing August 2

NextGen Legal and LPI are offering this eight-week, online Beginning Legal Secretarial Training Course. You will be able to work at your own pace.

Cost

**\$180 LPI members
\$250 non-LPI members**

Cost includes a Legal Secretary's Reference Guide.

Each individual must register separately. Upon completion of the course, students will receive a certificate from LPI.

Classes will take place online utilizing video lectures, discussion boards, email, live Q&A sessions and quizzes. Login information will be provided the day before the class is scheduled to begin.

SOME OF THE TOPICS THAT WILL BE COVERED:

- Introduction to the Law Office
- Duties of the Legal Secretary
- Effective Telephone Skills
- Effective Oral Communication Skills
- Calendaring and Timetables
- Basic Grammar Skills
- Transcription and Proofreading Techniques
- Court Structure
- Citations
- Service of Legal Documents
- Preparing a Proper Caption
- Preparation of Documents Filed with the Court
- Basics of Civil Litigation Interrogatories
- Demand for Production of Documents
- Request for Admissions
- Depositions/Deposition Subpoenas
- Demand for Physical Examinations
- Discovery Timelines, Service and Verifications

**ONLINE REGISTRATION AND
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Upcoming LPI Conferences

First Quarterly Conference

August 12-14, 2022

Doubletree Anaheim/Orange - Orange, CA

Co-Hosted by LPI and Orange County LPA



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. C - Answer
2. F - Felony
3. G - Pleading
4. B - Statute
5. A - Writ
6. D - Remand
7. E - Motion



SAVE THE DATE!

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

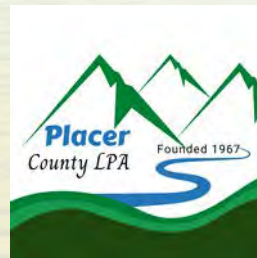
FOLLOW THE
YELLOW BRICK ROAD ...



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CONFERENCE

NOVEMBER 11—13, 2022

HILTON SACRAMENTO ARDEN WEST



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.

EMPLOYEE AND MEMBER DISCOUNTS

<https://www.employeeandmemberdiscounts.com/employee-discounts-and-offers/legal-secretaries-incorporated/>
Discounts on auto and car, entertainment, financial, health and medical, home services, insurance and warranty services, travel and vacation, pet care, and other unique offers.

WORKING ADVANTAGE

Toll Free: (800) 565-3712
www.workingadvantage.com
Discounts on events, movies, theme parks, live theater, sporting events, ski tickets, hotels, family events, gift cards and more.
Member ID: Contact LPI Corporate Office at info@legalprofessionalsinc.org, or LPI Vice President.

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Law Office Products & Management

Does Your Office Need Project Management Assistance?

By Lynne Prescott, CCLS

How does your office handle the various and numerous tasks associated with complex cases or matters scheduled for trial? Who keeps track of who's doing what? How do you check the status? How do you know when a task is completed or needs review? There are some great tools out there that can help. One of them, which is the focus of this article, is a software application called Trello.

Trello is a visual tool that empowers your team to manage any type of project, workflow, or task tracking. It does this by allowing you to create a project dashboard that contains your list of to-do items in the form of cards. The cards are the building blocks of your dashboard and can be expanded on assignments, timelines, productivity metrics, calendars, and more.

For example, let's examine some of the various tasks that need to be addressed when you know your case is definitely going to trial:

- Trial Binder Assembly
- Exhibit Binder Assembly
- Exhibit Display Production
- Audio-Visual Equipment
- Layout of Courtroom (for electrical outlets, exhibit placement, etc.)
- Wi-Fi Capability
- Court Reporter & Management of Dailies
- Hotel Arrangements
- War Room
- Experts & Witnesses
- Meals
- Jury Instructions
- Motions in Limine
- Organizing and Shipping of Materials



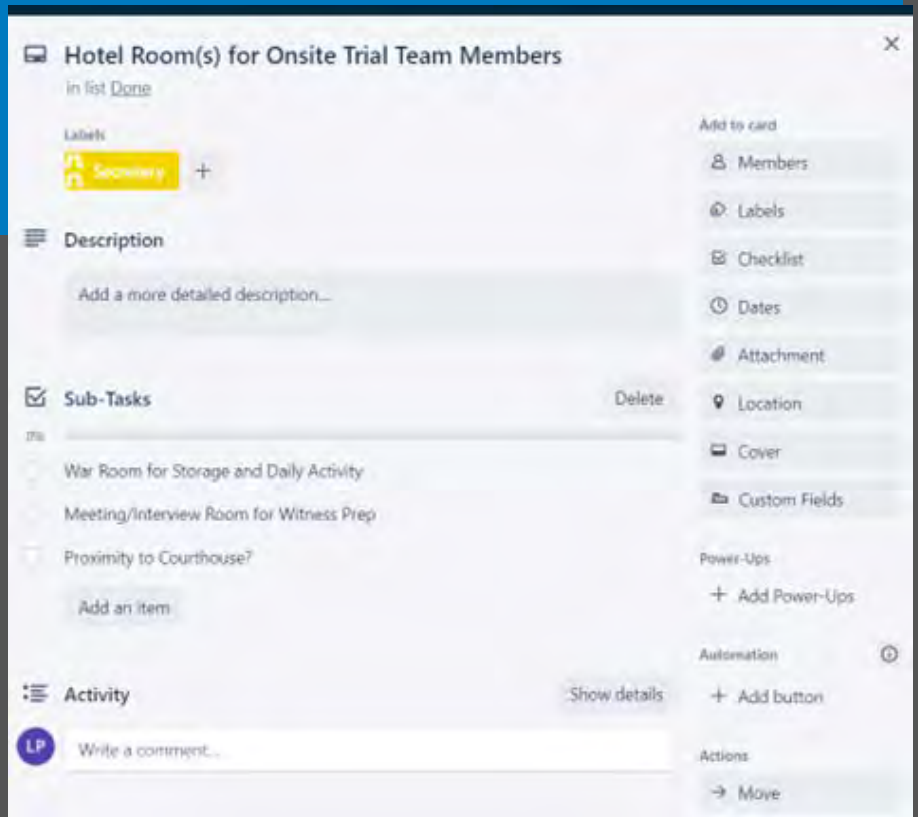
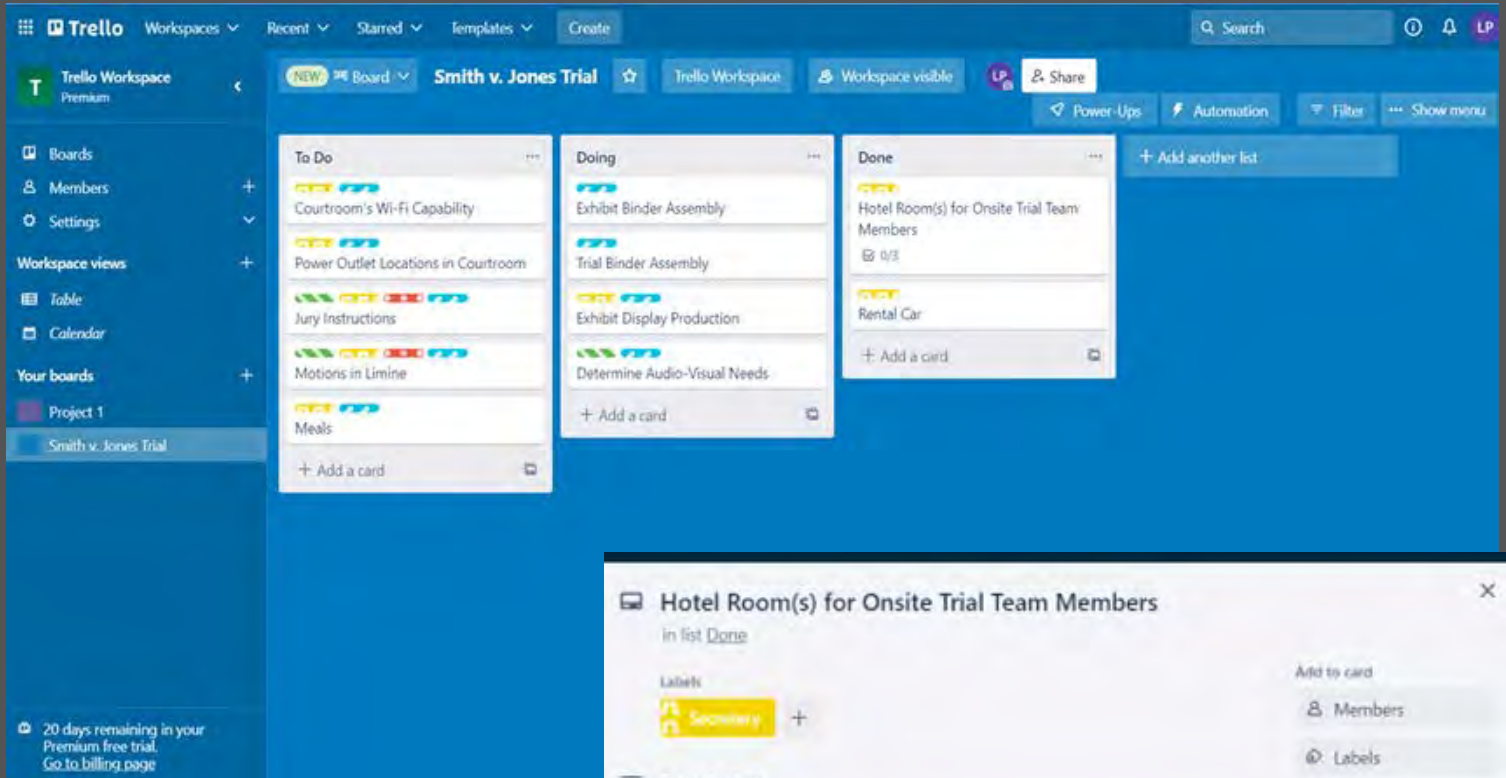
This list could go on and even be broken into multiple subtasks under each main task. Rather than a white board, flip chart, printed checklist or items clogging your Outlook calendar, what if your project management board looked like this:

Continued on page 30

Law Office Products & Management

Does Your Office Need Project Management Assistance?

Continued from Page 29

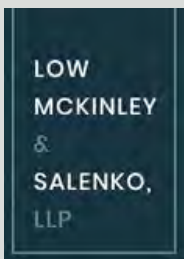


Here, the colors assigned to the trial team members are: Red - Lead Attorney; Green - Associate Attorney; Blue - Paralegal; and Yellow - Secretary. As tasks are being worked on or completed, the cards get moved to the appropriate column to reflect where they are in the process. Each card can be opened up for more details to be associated with the task, such as due date, comments, etc. There is also a checklist feature available under each task (see example at right), which acts as a sub-task function, and a notifications feature that alerts users when items in the checklist have been accessed or changed.

The Trello board is designed to be shared and accessible among team members so that the project can be updated as needed. Trello has a free trial version, as well as a paid version. It's worth looking into if your office is project or trial heavy.

Employment Report

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



Experienced Litigation Secretary

Low McKinley & Salenko, LLP, an AV-rated firm, is looking for an experienced litigation secretary with 5-10 years of experience in insurance defense to join our Sacramento office.

Job Duties:

- Strong organizational skills; ability to prioritize workload and detail oriented;
- Strong skills in proofreading and editing correspondence, pleadings and memoranda;
- Excellent communication skills, both verbal and written;

- Knowledge of current State and Federal rules;
- Maintain current files, both paper and electronically;
- Able to manage multiple deadlines for attorneys;
- Ability to manage heavy law and motion;
- Proficient in Microsoft Word and Outlook; Prolaw a plus;

Excellent benefits package and salary.
Work remotely temporarily due to COVID-19.



Receptionist/Office Services

Somach Simmons & Dunn, a mid-size environmental law firm, seeks a part-time receptionist / office services person. This is an in-office only position with some flexibility for a 20-30 hour work schedule Monday through Friday. Legal office experience is preferred but not required. This individual will work closely with all office personnel including attorneys, paralegals, and administrative staff. Essential functions include: greeting clients and visitors, answering visitor inquiries, handling all incoming calls on a multi-line telephone system, maintaining and scheduling conference calendars, coordinating and supporting all general office functions including filing, office supply ordering and stocking, office equipment support, incoming and outgoing mail processing, etc.

Requirements: A minimum of two years' experience within an office environment. Organizational skills to work independently and meet deadlines. Time management skills to handle multiple tasks accurately. Must be computer literate and proficient with email, calendaring, Microsoft Office, and multi-line phone systems. Must be detail oriented and have ability to work in a fast-paced environment. Team player attitude is essential. We are looking for someone who can work independently and anticipate the needs of others. This is a great opportunity for a self-starter looking to provide administrative support throughout an entire office to all levels of personnel.

Interested candidates should send their resume with cover letter including salary requirements to iestrada@somachlaw.com or Somach Simmons & Dunn, Attn: Human Resources, 500 Capitol Mall, Suite 1000, Sacramento, CA 95814 (no phone calls please).

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Crystal Rivera

Audit & Budget Committee

Crystal Rivera

Marci Frazier

Benefits

Vacant

Bulletin Editor

Lynne Prescott, CCLS

California Certified Legal Secretary (CCLS)

Brenda Johnson, CCLS

Charitable Projects

Day In Court

Terry Olson

Employment

Brenda Johnson, CCLS

Historian

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Law Office Products & Management

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Legal Procedures

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Legal Professional of the Year/Boss of the Year

Vacant

Legal Secretarial Training

Brenda Johnson, CCLS & Lynne Prescott, CCLS

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Professional Liaison

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Ways & Means

Vacant

Website Coordinator/Social Media

Lynne Prescott, CCLS

Fairytale Town

Vacant

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.*

LPI and SLSA ASSOCIATE MEMBER (Annual Dues \$25):** Persons who are actively seeking employment in the legal profession. An Associate Member of LPI may maintain Associate Membership for a period of two years. Associate 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 associate members are eligible for SLSA and LPI scholarships. *Dues include local dues, my initiation fee, and LPI per capita tax.*

* 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:

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

MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

NAME: _____

ARE YOU A CCLS? _____

BIRTHDAY: _____

JOB TITLE: _____

EMPLOYER: _____

BUSINESS ADDRESS: _____

BUSINESS PHONE: _____

BUSINESS E-MAIL: _____

RESIDENCE ADDRESS: _____

RESIDENCE PHONE: _____

RESIDENCE E-MAIL: _____

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/LPI mail delivered? (check one) Business Residence

Where do you want e-mail delivered? (check one) 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 LPI: _____
	On Email List: _____	To Edition: _____

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Vice President
vicepresident@slsa.org

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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ATTORNEY AND LITIGATION SUPPORT SERVICES

- SERVICE OF PROCESS
- INVESTIGATIONS
- BANK LEVIES
- WAGE GARNISHMENTS
- SECRETARY OF STATE
- MEDICAL RECORDS
- COURT FILING
- NOTARY

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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
Credit card (Visa, Mastercard, Discover, AMEX) 3%	

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