



# The Legal Eagle

## Sacramento Legal Secretaries Association

Book 2015, Issue 4  
April 2015



### Managing New Forms of Discovery



Lynne Prescott, CCLS, and Morgan Albanese of Litigations Services (see story on page 4)

#### In this Issue

[76<sup>th</sup> Annual Installation of Officers](#)

[Results: Nominations and Elections](#)

[LSI's Annual Conference](#)

[Save the Date!](#)

[MS Word Tips!](#)

#### Table of Contents

President's Message	2
April Meeting Flyer	3
Speaker Spotlight	4
Member News	11
Vendor Spotlight	17
Calendar/Dates to Remember	21
CCLS Report	22
Legal Procedures	24
Of Note	28
Law Office Products and Management	29
Benefits	31
Governor's Report	32
CAPs Report	34
Employment Report	39

#### April Meeting Information

SLSA welcomes Gary Smith, Executive Director of Legal Services of Northern California to our April 2015 monthly dinner meeting. Mr. Smith will be speaking about the legal services that LSNC offers to the community.

The dinner meeting will be on April 16, 2015, at the Downtown Courtyard Marriott, 4422 Y Street, Sacramento, CA. Meet and Greet at 5:30 p.m. The dinner meeting begins at 6:15 p.m.

#### President

Lynne Prescott, CCLS  
Messing Adam & Jasmine LLP  
980 9th Street, Suite 380  
Sacramento, CA 95814  
(916) 551-3360

#### Bulletin Editor

Corene E. Rodder  
Somach Simmons & Dunn  
500 Capitol Mall, Suite 1000  
Sacramento, CA 95814  
(916) 469-3814



## President's Message: "The Legacy and the Tribe"

Submitted by Lynne Prescott, CCLS



As you have probably surmised from my messages over the last couple of years, I am a big supporter of all things having to do with preserving history and ensuring the continuation of legacies. I also firmly believe in the power of family – be it family of origin, or the people you choose to embrace as family as you go through life. I think a lot of my passion for this comes from the deep need that many of us have for wanting to leave some tangible part of ourselves behind; wanting to know who we are, who our people are, and where we came from, etc. In fact, growing up in the Deep South as I did, “Who are your people?” and “Where are your people from?” were questions I heard from the time I was itty-bitty, and are still being asked today. I think these are wonderful questions. It’s not so much out of nosiness that people ask, but rather out of that need to somehow find a connection.

When I was first installed as SLSA President in April 2013, I quoted from a book entitled *1,000+ Little Things Happy Successful People Do Differently*, by Marc & Angel Chernoff, that contains a list of “12 Steps to Make a Dream a Reality.” Step #3 of that list states: “Surround yourself with great people. You are the sum of the people you spend the most time with. Find your tribe and work together to make a difference in all of your lives – you will be far more capable and powerful than you ever could have been alone.”

In SLSA, I found my tribe. I surrounded myself with great people. I embraced them as family, and they did the same with me. I connected with them, and they with me. They became, and still are, “my people.” I want to thank the Executive Board members and committee chairmen who have supported me and been servant leaders with me over the last two years. I would not have been able to add my legacy, that small, tangible part of myself, to those that have gone before me, without you – my tribe and family. I spent most of my time with you the last two years and we all worked together to make a difference. You embraced me, inspired me, encouraged me, and gave me the confidence to keep SLSA moving forward. I am so grateful, honored, and humbled.

One of the most rewarding experiences in being part of a great tribe is watching the next set of leaders move forward and take their place in the continuation of the legacy. As I mentioned in my last President’s Message, I am so proud of the incoming officers for 2015-2016 for their courage and willingness to lead. Please offer them your support and help where you can. It truly makes a difference, and makes us all far more capable and powerful than we could ever have been alone.

Thank you for your faith in me, thank you for allowing me to serve as your President these past two years, and thank you for the opportunity to become part of SLSA’s legacy. Most importantly, thank you for being my tribe and my family.

The legacy continues . . .

- Lynne



# Sacramento Legal Secretaries Association



## Dinner Meeting - April 16, 2015

Courtyard Marriott  
4422 Y Street - Sacramento

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



## 76<sup>th</sup> Annual Installation of Officers Guest Speaker: Gary Smith, Executive Director



Legal Services  
of  
NORTHERN CALIFORNIA

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

**RSVP by Noon on Friday, April 10\***

### Two Ways to Register:

- Online at [www.slsa.org](http://www.slsa.org) under Upcoming Events (Preferred)
- Via e-mail at [reservations@slsa.org](mailto:reservations@slsa.org) (please include menu choice)

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

### Make checks payable to SLSA and mail to:

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

### Dinner Menu – Choice of:

- Grilled Chicken Breast with Apples & Grapes. Served with Demi Sauce, Rice, and Vegetables.
- Penne Pasta Primavera with Fresh Vegetables & Light Olive Oil Vinaigrette. Served with Grilled Vegetables, Rice, and Balsamic Glaze.

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

**SLSA's Vendor Partner for April 2015:**



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



Submitted by Crystal Rivera

### **“Managing New Forms of Discovery: ESI Liaisons and Social Media and Mobile Device Evidence in Complex/Non-Complex Litigation Matters”**

Morgan Albanese, the General Manager of the Northern California office of Litigation Services, was the guest speaker at our March 19, 2015 membership dinner meeting. She received her B.A. in journalism from California State University, Sacramento, in 2008 with cum laude honors and entered the legal service industry in 2009. After gaining a background in marketing for a UCC filing company, she found her way into the court reporting industry.

In addition to her duties at Litigation Services, Mrs. Albanese is an active member of the Sacramento County Bar Association, the Sacramento Legal Secretaries Association (SLSA), and the Leonard M. Friedman Bar Association. She currently resides in Sacramento, where she is growing the Northern California LIT office. On her off days, you will find her spending lots of time with her husband and their Shihpoo, Mochi.

Mrs. Albanese’s presentation regarding new forms of discovery was very informative. Litigation Services offers a complete suite of litigation support services from matter inception to resolution: ESI (electronically stored information) Liaisons; domestic and international forensic collection, analysis, reporting and testimony; online hosted discovery review services (depository/repository); managed review; national court reporting; and, trial support experts.

Mrs. Albanese discussed the emerging and important role of the ESI Liaison in the discovery process.

The ESI Liaison may be a party’s employee, a consultant, or an attorney, prepared to participate in eDiscovery dispute resolution, and knowledgeable about the party’s eDiscovery efforts. They need to be familiar with the party’s systems and capabilities in order to explain systems and answer questions, and knowledgeable about the technical aspects of eDiscovery, including storage, organization, format, and retrieval technology, including search methodology.

There are some critical categories of information that the attorney must provide their ESI Liaison to reasonably ensure a successful outcome. They must define the beginning and ending dates of the dispute; an understanding of damages being alleged in total dollar terms; the current complaint, and answers/defenses thereto; and, current list of named, known litigants or custodians of electronic evidence.

There are also suggested categories to identify and request, such as: personal and work-provided laptop and desktop computers; iPads and/or tablets; smartphones; loose media (flash drives, external hard drives, DVDs); personal and/or departmental shared folders on a company file server; third party email accounts (Gmail, Yahoo Mail); social media accounts (Facebook, LinkedIn); cloud storage (Google Drive, Dropbox); archive media (backup tapes, hard drives, optical disks); and paper files.

There are challenges of social media/mobile device evidence in complex/non-complex litigation matters. In the days of paper only discovery, paralegals or associate attorneys would order a chronological photocopy set and then they would do a page-by-page review. Commonly encountered electronic discovery “universes” currently number in the 10s to 100s (e.g., Facebook, Instagram, LinkedIn) and will continue to expand on a regular basis. Can all of these universes possibly be dispositive?

New universes of potentially relevant evidence continue to appear and be adopted almost randomly: cloud; social networking; instant messenger; webmail applications; peer-to-peer file sharing applications; web browsers; mobile backups; picture and video media; video game consoles; etc.

Using police and military sector technology, LIT’s experts are able to recover evidence of internet/social media usage directly from desktop/laptop computer hard drives, smartphones, tablets/iPads, etc. Their Internet Evidence Finder (IEF) is able to find cloud storage usage, Facebook

## Speaker Spotlight (Continued)

messaging usage, evidence of search terms, evidence of LinkedIn usage, evidence of viewed pictures, evidence recovered from “safe” browsing, location based evidence, etc. They can recover the times, dates, and locations (who, what, when, where) of the user’s electronic activities. Note that signing into a WiFi network creates a time/date/location stamp on a workstation (smartphone, laptop, etc.). LIT’s system creates a timeline of everything done on the electronic device(s) within the specific search parameters.

And, when you think you’ve deleted files, text messages, etc., almost all the time the experts can still find and retrieve that information.

This discovery can be used in support of, or against, your client. But remember, if unfortunately you and your employer end up in litigation against each other, this sort of discovery can be utilized. So, if you’re looking for a new job, don’t use any electronics that your work provided. And, if you’re playing hooky from work, don’t use any electronic devices that can track what you’re doing (when, where, etc.). You don’t want your employer finding out that you were on the beach surfing the net on a Wednesday afternoon when you called in sick!

### *Author’s bio:*

I’ve been a legal secretary since 1979, and was with the Grunsky Law Firm in Watsonville for almost 20 years. I am currently a legal secretary to three shareholders at Somach Simmons & Dunn, and have been at SSD for almost 14 years. I have one child, Army Staff Sergeant Heidi Rivera-Merrill who is stationed at Ft. Bragg, North Carolina, and I’m so proud of all that she has accomplished! A little fact about me: I’m a really shy person and I have to make a conscious effort to even say Hi to people and engage in conversation. I’d rather blend in with the wallpaper!



## Nominations and Elections

Submitted by Dawn Forgeur, CCLS

At the March 19, 2015 dinner meeting, the Nominations and Elections Committee validated 51 ballots with the following results:

For the position of Delegate to represent SLSA at LSI's May 2015 Annual Conference, the winners are:

Jan Ainsworth  
Paula Lockard, CCLS  
Corene Rodder

The Alternate Delegates are Terry Olson and Brenda Bracy.

Congratulations to all the nominees and thank you for stepping up and being willing to represent SLSA at the May Annual Conference! Thank you, SLSA members, for participating in the election and sending your votes in! You are a member of this corporation and your vote ensures that SLSA is represented.

### Nominations and Elections Committee

Dawn R. Forgeur, CCLS – Chair  
Selena Paradee – Member  
Launa Atkinson, CCLS – Member

# Quarterly Conference Report and Future LSI Quarterly and Annual Conferences



Submitted by Crystal Rivera

## **FEBRUARY LSI QUARTERLY CONFERENCE**

I was pleased to find out that my name was picked by SLSA for the free scrip to attend LSI's February Quarterly Conference (February 20-22). I was also pleased that I didn't have any filings the following Monday (so I wouldn't have to work that weekend).

Conference host was San Fernando Valley Legal Secretaries Association (SFVLSA), and they did a great job! The theme for Conference was "Viva Las Vegas" "What Happens at Conference – Stays at Conference" (this saying was repeated several times).

The Conference was held at the Garland Hotel in North Hollywood, the same weekend as the Oscars. I flew into the Burbank Airport (aka Bob Hope Airport), and kept an eye out for celebrities, but unfortunately I didn't see any.

The Garland is a nice hotel, cozy enough that you aren't walking a mile from room to workshop, lunch, dinner, etc. I started seeing familiar faces from previous conferences as soon as I walked into the lobby.

As always, there were great workshops and Legal Specialization Section (LSS) seminars.

I attended the Friday night Welcome Reception where we had some nice hors d'oeuvres. After the Reception, a group of us took a nice walk to a nearby restaurant – which wasn't exactly as nearby as we all thought – but

it was a decent trek, which was good because we were all so stuffed!

Saturday was busy. In the morning I attended the Board of Governors Meeting, and then the Civil Litigation LSS seminar. The LSS seminar speaker was attorney Alexander Kasendorf of Alpert Barr & Grant, and the topic was "Sacramento's Shadow on the World of Litigation – How Pending Legislation can have a Dramatic Impact." He was a terrific speaker and explained how new laws/legislation can have an impact on what we do as legal support professionals. After the LSS seminar, I attended the Governor's Luncheon, which was very enlightening especially since I will be SLSA's 2015-2016 President. (I guess I need to know what my Governor does at conference.) In the afternoon, I attended the Board of Governors Meeting where many Executive Committee and Marketing Committee Recommendations were adopted.

Saturday evening was Banquet. We had a very entertaining speaker, and the jazz band DA Bookman & Flow played a few songs during and after.

Sunday morning was Brunch. When I walked into the ballroom for brunch, the SLSA gals were all excited because I had won several raffle prizes. (I came home with four different gift cards!) Our guest speaker for brunch was attorney and best selling author Robert Tanenbaum. He has written over 26 books! While he was with the New York County District Attorney's office, he never lost a felony case – which is amazing! He also served two terms as Mayor of Beverly Hills. He was extremely engaging and had everyone's attention.

Other things *may* have happened at Conference, but "What Happens at Conference – Stays at Conference!"

<b>2015</b>	
<b>LSI 81st Annual Conference</b>	
<b>May 14-17, 2015</b> Bahia Resort <i>Host Association: San Diego LSA</i>	
<b>LSI First Quarterly Conference</b>  <b>August 21-23, 2015</b> Stockton Hilton <i>Host Association: Stockton – San Joaquin County LPA</i>	<b>LSI Second Quarterly Conference</b>  <b>November 13-15, 2015</b> Marriott Hotel, Riverside <i>Host Association: Riverside LPA</i>
<b>2016</b>	
<b>LSI Third Quarterly Conference</b>  <b>February 26-28, 2016</b> Tenaya Lodge, Fish Camp <i>Host Association: Merced County LPA</i>	<b>LSI 82nd Annual Conference</b>  May 19-22, 2016 Flamingo Conference Resort and Spa, Santa Rosa <i>Host Associations: Marin County, LPA/San Francisco LPA</i>

San Diego Legal Secretaries Association  
presents



# CARNAVALE



Legal Secretaries, Incorporated's 81<sup>st</sup> Annual  
Conference  
May 14-17, 2015

## HOTEL REGISTRATION FORM

**Bahia Resort Hotel**  
998 W. Mission Bay Drive, San Diego, CA 92019  
Phone: 858.488.0551

**ROOM RATES:\***

Single: \$149.00

Double: \$149.00

Triple: \$169.00

Quad: \$189.00

\*(Please note: these room rates are guaranteed only until **April 14, 2015**)

To Make Reservations online: [https://shop.evanshotels.com/bahia\\_groups/1643.html](https://shop.evanshotels.com/bahia_groups/1643.html)

To Make Reservations by phone: **800.288.0770** or **858.488.0551**

**GROUP NAME:** LSI 2015 Annual Conference

**SPECIAL REQUESTS:** Please notify Conference Chair or Registration Chair for room accessibility requests **as soon as possible**. Although the hotel cannot guarantee your request, reserving your room early will allow a greater opportunity for the hotel to honor your request.

**For General Information Contact:**

Michelle D. Tice, CCLS Conference Chair

Email: [MDTice@cox.net](mailto:MDTice@cox.net)

Telephone: 619.820.9525

Annie S. Parrish, CCLS, Registration Chair

Email: [2015RegChair@gmail.com](mailto:2015RegChair@gmail.com)

Telephone: 619.322.5066

**HOTEL REGISTRATION DUE BY APRIL 14, 2015**

San Diego Legal Secretaries Association  
presents

# CARNAVALE



Legal Secretaries, Incorporated's  
81<sup>st</sup> Annual Conference

Bahia Resort Hotel  
998 W. Mission Bay Drive, San Diego, CA 92019  
May 14-17, 2015

## CONFERENCE REGISTRATION FORM

Name (as it will appear on badge): \_\_\_\_\_

Association Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

**Please check if applicable and include title:**

**Please check if you are:**

LSI Officer/Chair \_\_\_\_\_  Governor  CCLS  PLS

**SCRIP TICKET (price includes: registration, reception, banquet, brunch):**

POSTMARKED ON OR BEFORE **April 14, 2015** \_\_\_\_\_ @ \$139.00 \$ \_\_\_\_\_  
POSTMARKED ON OR AFTER **April 15, 2015** \_\_\_\_\_ @ \$149.00 \$ \_\_\_\_\_

### INDIVIDUAL TICKETS:

Registration <b>on or before April 14, 2015</b>	_____ @ 20.00	\$ _____
Registration <b>on or after April 15, 2015</b>	_____ @ 30.00	\$ _____
Welcome Reception (Friday)	_____ @ 25.00	\$ _____
Governor's Luncheon (Friday)	_____ @ 38.00	\$ _____
President's Luncheon (Friday)	_____ @ 38.00	\$ _____
Newcomer's Luncheon (Friday)	_____ @ 38.00	\$ _____
CCLS/Member Luncheon (Saturday)	_____ @ 38.00	\$ _____
Saturday Night Banquet	_____ @ 66.00	\$ _____
Sunday Brunch	_____ @ 34.00	\$ _____

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

**Special Dietary Requests:** \_\_\_\_\_

**RETURN THIS FORM and PAYMENT TO:** (checks payable to **SDLSA 2015 Annual Conference Fund**)

Annie S. Parrish, CCLS, Registration Chair  
1819 Julianna Street  
Rancho San Diego, CA 92019  
Email: [2015RegChair@gmail.com](mailto:2015RegChair@gmail.com)  
Telephone: 619.322.5066 Fax: 619.230.0987



**NO REFUNDS AFTER APRIL 30, 2015**



**ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION**

*A Member of Legal Secretaries, Incorporated*

*Speaker: Michelle Regalia McGrath*



**Prevention, Detection and Correction  
of Harassment and Bullying  
in the Workplace**

**Tuesday, May 5, 2015  
6:00 p.m.**

**Location  
Buttercup Grill  
229 Broadway, Oakland**

- 1) **GRILLED CHICKEN TOSTADA** – A large flour tortilla shell filled with beans, shredded lettuce, jack and cheddar cheese, topped with grilled chicken and garnished with guacamole, sour cream, diced tomatoes and green onions.
- 2) **AVOCADO BURGER** – A plump patty served on an old fashioned bun topped with lettuce, tomatoes, red onions, avocado, Jack cheese and Thousand Island dressing. Served with a choice of fries, curly fries or potato salad (*please specify*).
- 3) **B. L. T. & G** – An update BLT with bacon, lettuce, tomatoes and guacamole on a toasted sour dough bread with mayonnaise. Serve with reg. or curly fries (*please specify*).
- 4) **SHRIMP SCAMPI** - Jumbo shrimp sautéed in garlic butter, served over rice with fresh vegetables. Served with a choice of dinner salad (*please specify dressing*), cup of home-style soup or baked potato.

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

**COST**

**\$25 per person**

PLEASE NOTE: 24-hr cancellation of reservation required to avoid being charged for meals.  
No-shows will be charged for their meal.

Please make checks payable to “ACLSA”.

**RESERVATIONS REQUIRED**

Please submit your reservation and dinner choice to

Judy A. Martinez as soon as possible,

RSVP Deadline: No later than Friday, May 1<sup>st</sup> at [jmh1561@aol.com](mailto:jmh1561@aol.com)

---

*ACLSA, a local association of Legal Secretaries Incorporated, an approved provider, certifies that this activity has been approved for minimum of .45 hr. of CCLS/MCLE credit continuing legal education credit by the State Bar of California and Certified Legal Secretary.*

**RAPID LEGAL®**

*an online attorney service*



## OUR JOB IS TO MAKE YOU LOOK GOOD.

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

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



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

[www.rapidlegal.com/LSI](http://www.rapidlegal.com/LSI) | [info@rapidlegal.com](mailto:info@rapidlegal.com) | (800) 366-5445



Submitted by Crystal Rivera

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

## Birthdays

**The following members are celebrating their Birthday in April.**

We hope you have a Hop'n Birthday!

Casie Campbell	April 3
Robert Carter	April 4
Desiree Delonia	April 7
Kimberly Fedor	April 8
Jamie Brandt	April 9
Jennifer Goldsmith	April 9
Luke Patterson	April 12
CoSandra Pollard	April 17
Rebecca Lerma	April 19
Yelana Williams	April 19
Suzanne MacDonald	April 22
DeAnn Rippy	April 29
Kimberly Bogie	April 30



## Items for the SLSA History Book

If you have photos, programs, flyers, or other memorabilia from an SLSA or LSI event you attended this past year, PLEASE GET THEM TO SLSA HISTORIAN LIZ GIDEON, CCLS, as soon as possible! She needs to have everything to put into the book to present to President Lynne and to take to the LSI Annual Conference, so your help, photos and mementos would be greatly appreciated!

Please contact Liz at [lgideon@weintraub.com](mailto:lgideon@weintraub.com). Thanks!

## Membership Renewals

Reminder: Get your membership renewals in on time. They are due May 1, 2015. To avoid the additional late fee, get it in before June 1, 2015. The 2015-2016 renewal forms are in this bulletin, are available on SLSA's website, and will be emailed to all current members. Copies will also be available at SLSA's April 16, 2015 general membership dinner meeting.



**Sacramento Legal Secretaries Association  
Membership Renewal Invoice**

**Membership Period: May 1, 2015 – April 30, 2016  
Due Date: May 1, 2015**

Make check payable to:

**Sacramento Legal Secretaries Association**

Amount Due: **\$40**

Renewals are due May 1, 2015

There will be a late fee of \$5 after June 1, 2015

Return the completed invoice and full payment to:

**Heather Rodriguez, CCLS**

**SLSA Treasurer**

**Messing Adam & Jasmine LLP**

**980 9th Street, Suite 380**

**Sacramento, CA 95814**

**MEMBER INFORMATION (PLEASE PRINT LEGIBLY):**

**NAME:** \_\_\_\_\_

**ARE YOU A CCLS?** \_\_\_\_\_

**BIRTHDAY:** \_\_\_\_\_

**JOB TITLE:** \_\_\_\_\_

**EMPLOYER:** \_\_\_\_\_

**BUSINESS ADDRESS:** \_\_\_\_\_

**CITY, STATE & ZIP:** \_\_\_\_\_

**BUSINESS PHONE:** \_\_\_\_\_

**BUSINESS FAX:** \_\_\_\_\_

**BUSINESS E-MAIL:** \_\_\_\_\_ (for vital updates/reminders)

**RESIDENCE ADDRESS:** \_\_\_\_\_

**CITY, STATE & ZIP:** \_\_\_\_\_

**RESIDENCE PHONE:** \_\_\_\_\_

**RESIDENCE E-MAIL:** \_\_\_\_\_ (for vital updates/reminders)

**YOUR SPECIALTY:**

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

**MAILING/LISTING INFORMATION:**

Where do you want your SLSA/LSI mail delivered?

Business                       Residence

Where do you want e-mail delivered?

Business                       Residence

**INVOLVEMENT:**

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

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

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

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

**CHANGES?? UPDATES??**

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



**Sacramento Legal Secretaries Association  
Name/Address Change Reporting Form**

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

**CHANGES IN MEMBER INFORMATION (PLEASE PRINT LEGIBLY):**

NAME: \_\_\_\_\_

FORMER NAME: \_\_\_\_\_

NEW EMPLOYER: \_\_\_\_\_

BUSINESS ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE & ZIP: \_\_\_\_\_

BUSINESS PHONE: \_\_\_\_\_

FAX: \_\_\_\_\_

BUSINESS E-MAIL: \_\_\_\_\_

NEW HOME ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE & ZIP: \_\_\_\_\_

HOME E-MAIL: \_\_\_\_\_

**CHANGE IN SPECIALTY:**

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

**CHANGES TO MAILING/LISTING INFORMATION:**

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

Please submit to:

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

**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:

**Lacy Monserrat, CCLS, Vice President  
Sacramento Legal Secretaries Association  
c/o Messing Adam & Jasmine LLP  
980 9th Street, Suite 380, Sacramento, CA 95814**

NAME OF APPLICANT \_\_\_\_\_ ARE YOU A CCLS?  YES  NO

EMPLOYER \_\_\_\_\_ POSITION \_\_\_\_\_

BUSINESS ADDRESS \_\_\_\_\_ CITY/ZIP \_\_\_\_\_

BUSINESS PHONE \_\_\_\_\_ BUSINESS E-MAIL \_\_\_\_\_

RESIDENCE ADDRESS \_\_\_\_\_ CITY/ZIP \_\_\_\_\_

RESIDENCE PHONE \_\_\_\_\_ RESIDENCE E-MAIL \_\_\_\_\_

EMPLOYMENT IN THE LEGAL FIELD (INCLUDE POSITIONS, DATES) \_\_\_\_\_

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

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

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

SIGNATURE OF APPLICANT \_\_\_\_\_ DATE \_\_\_\_\_

SPONSOR (IF ANY) \_\_\_\_\_ APPLICATION APPROVED \_\_\_\_\_

---

---

**SLSA MEMBERSHIP CATEGORIES/ANNUAL DUES (Check One)**

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

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

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

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

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

Name: \_\_\_\_\_ Birthday (MO/DAY)\_\_\_

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

**YOUR SPECIALTY:**

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

**EDUCATION:**

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

**TYPE OF OFFICE:**

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

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

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

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

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

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

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

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

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

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

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

Lacy Monserrat, CCLS, Vice President  
 Sacramento Legal Secretaries Association  
 c/o Messing Adam & Jasmine LLP  
 980 9th Street, Suite 380  
 Sacramento, CA 95814

Spring Bunco with Placer County LPA



Registration



Dawn Forgeur, CCLS



Crystal Rivera



Dawn Forgeur, CCLS, and Crystal Rivera





## Vendor Spotlight: Litigation Services

Submitted by Alex Cain

SLSA was pleased to have Litigation Services as our Vendor of the Month for March. Morgan Albanese was LIT's representative and let us know a little bit about their services.

Their office focuses on creating a great value at efficient costs through centralized discovery management for your complex litigation matters. Litigation Services can facilitate your needs in document processing, court reporting, legal video, trial services, complex case management, ESI collection, processing, and production. LIT also just moved into a new office in downtown Sacramento for your centralized needs.

As always, it is great to have Litigation Service's support of SLSA. Feel free to reach out to Morgan Albanese should you be interested in learning more about their great services.

Morgan L. Albanese  
General Manager

**Litigation Services** | Discovery - Depositions - Decisions  
[Morgan@litigationservices.com](mailto:Morgan@litigationservices.com) | [www.litigationservices.com](http://www.litigationservices.com)  
o: 800.330.1112 | m: 916.600.5587

**Support our vendors because they support us!**

Serving Northern California  
LOCAL | NATIONAL | INTERNATIONAL



- Court Reporters
- Interpreters | Videographers
- Online Repositories & Calendar Review
- Realtime & Remote Access
- Video & Text Streaming Over Internet
- Complex Litigation Expertise
- Electronic Discovery
- Trial Presentation Services

**Morgan Albanese, General Manager**  
916-600-5587 800-330-1112  
[morgan@litigationservices.com](mailto:morgan@litigationservices.com)

[www.litigationservices.com](http://www.litigationservices.com)

SLSA Dinner Meeting  
March 19, 2015



Jeanette Osman-Bravard, Karla Dougherty, and  
DeAnn Rippy



Margarita Jakovas, Lisa Haddix, Sharon Buckenmeyer



Dawn Forgeur, CCLS, Selena Paradee Debbie Jordan, and  
Teri McClory, CCLS

SLSA Dinner Meeting  
March 19, 2015



Jan Ainsworth and Liz Gideon, CCLS



President Lynne Prescott, CCLS, conducting the meeting



Paula Lockard, CCLS, and Elizabeth Madden, CCLS





**LEGAL SPECIALIZATION SECTIONS SEMINARS**  
 LSI Annual Conference – May 14-17, 2015 – Bahia Resort

The deadline to register without a late fee is Tuesday, May 5, 2015.

<b>LSI SECTION MEMBER:</b> Free w/reservation by May 5, 2015 \$5 at the Door/After Deadline Handout Only: \$5	<b>LSI NON-SECTION MEMBER:</b> \$10 w/reservation by May 5, 2015 \$15 at the Door/After Deadline Handout Only: \$10	<b>NON-LSI MEMBER:</b> \$15 w/reservation by May 5, 2015 \$20 at the Door/After Deadline Handout Only: \$15
<b>Friday, May 15, 2015 – 1:30 p.m. - 3:30 p.m.</b>		
<p style="text-align: center;"><b><u>Civil Litigation</u></b></p> <p style="text-align: center;">Demystifying the Rules of Evidence          Mary V.J. Cataldo, Esq.</p> <p style="text-align: center;"><input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only</p> <p><input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member</p>	<p style="text-align: center;"><b><u>Criminal Law</u></b></p> <p style="text-align: center;">The Best And Worst Practices In          Criminal Litigation          Judge Richard S. Whitney of the San Diego Superior Court</p> <p style="text-align: center;"><input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only</p> <p><input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member</p>	
<b>Friday, May 15, 2015 – 4:00 p.m. - 6:00 p.m.</b>		
<p style="text-align: center;"><b><u>Probate/Estate Planning and Family Law</u></b></p> <p style="text-align: center;">Crossover Issues in Family Law and Estate Planning          Miranda Franks, Esq.</p> <p style="text-align: center;"><input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only</p> <p><input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member</p>		
<b>Saturday, May 16, 2015 – 4:00 p.m. to 6:00 p.m.</b>		
<p style="text-align: center;"><b><u>Law Office Administration</u></b></p> <p style="text-align: center;">Adobe Training 1 &amp; 2          Barkley Court Reporters</p> <p style="text-align: center;"><input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only</p> <p><input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member</p>	<p style="text-align: center;"><b><u>Transactional Law</u></b></p> <p style="text-align: center;">The Business of Craft Brewing          Candace L. Moon, Esq.</p> <p style="text-align: center;"><input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only</p> <p><input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member</p>	

Name: \_\_\_\_\_  CCLS  Paralegal  PLS  
 E-mail: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Address/City/State: \_\_\_\_\_  
 Local Association: \_\_\_\_\_  LSA  LPA

Payment: <input type="checkbox"/> Check ( <u>made payable to LSI</u> ) <input type="checkbox"/> PayPal Available at <a href="http://www.lsi.org">www.lsi.org</a> <input type="checkbox"/> Credit Card: Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> Credit Card Number _____ Exp. Date: _____ CVV (Security) No: _____ Name on Credit Card: _____ <b>Send completed form and payment (check made out to LSI) to:</b> Dawn R. Forgeur, CCLS, LSS Coordinator 500 Capitol Mall, Suite 1600, Sacramento, CA 95814 Email: <a href="mailto:dawn.forgeur@stoel.com">dawn.forgeur@stoel.com</a>
---

*The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 2.0 hours each, by the State Bar of California. California Certified Legal Secretary credit offered is 2.0 hours.*

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

<b>April</b>	
April 1	April Fool's Day!! No, seriously . . . it's April Fool's Day!!
April 5	Easter Sunday!
April 8	SLSA Executive Board Meeting, 6:00 p.m., Messing Adam & Jasmine LLP, 980 9 <sup>th</sup> Street, Suite 380, Sacramento, CA 95814. All members welcome.
April 14	Last day to register for May 2015 LSI Annual Conference without incurring late fee.
April 14	Last day to book hotel for May 2015 LSI Annual Conference at the guaranteed conference rate.
April 15	Tax Day!
April 16	SLSA Regular Membership Meeting and Installation of Officers, Courtyard Marriott, 4422 Y Street, Sacramento, 5:30 p.m. Meet and Greet, 6:15 p.m. Dinner.
April 20	Deadline to submit articles to the Editor for the May Issue of <i>The Legal Eagle</i> .
April 22	Administrative Professionals Day!
April 22	Earth Day.
April 29	SLSA Parliamentarian Training, 6:00 p.m. – 9:00 p.m., Somach Simmons & Dunn, 500 Capitol Mall, Suite 1000, Sacramento, CA.
<b>May</b>	
May 5	Last Day to register for any Legal Specialization Section Seminars without incurring a late fee.
May 10	Mother's Day.
May 12	SLSA Executive Board Meeting, 6:00 p.m., Somach Simmons & Dunn, 500 Capitol Mall, Suite 1000, Sacramento, CA.
May 14 – 17	LSI 81st Annual Conference, San Diego, CA.
May 25	Memorial Day!! State and federal courts closed and no U.S. Mail delivery or pick up.
May 21	Deadline to submit articles to the Editor for the June Issue of <i>The Legal Eagle</i> .

**NOTE: WE WILL NOT HAVE A REGULAR MEETING IN MAY!**





Submitted by Liz Gideon, CCLS

**Please select the correct answer.**

1. In order to ascertain and correctly determine if it will be a testate proceeding or an intestate proceeding you must know:
  - a. The county where the decedent died.
  - b. Who are the surviving heirs?
  - c. If the decedent owned real property.
  - d. Whether the decedent died with or without a Will.
2. After an original Will is stapled:
  - a. Remove staple and make adequate copies.
  - b. If not on a back, remove staple and re-staple.
  - c. It should not be unstapled for any purpose.
  - d. Remove staple to make corrections and re-staple.
3. The Probate Code allows for Summary Probate:
  - a. When the estate has assets under \$100,000.
  - b. Only by use of an affidavit.
  - c. Never. You must always file a general probate.
  - d. When a referee signs an Inventory and Appraisal indicating no assets.
4. One who dies leaving a valid Will:
  - a. Intestate.
  - b. Testate.
  - c. Testator.
5. A holographic Will must be submitted along with:
  - a. Proof of the decedent's handwriting written by decedent within the last 5 years.
  - b. Five (5) photocopies of the purported document.
  - c. A typewritten counterpart setting forth the Will in its entirety.
  - d. A videotape or audiotape, if any, to which the decedent refers.
6. When must the original Will and any codicils be filed?
  - a. Within 60 days after the death of the decedent.
  - b. Within 90 days after the death of the decedent.
  - c. Within 30 days after the death of the decedent.
  - d. There is no statutory requirement.
7. The estate may be closed if 4 months have elapsed since the issuance of Letters and:
  - a. All required reports filed.
  - b. Creditor's claims period has expired.
  - c. Inventory and Appraisal filed.
  - d. Report and First Accounting filed with the Court.
8. A "testamentary trust" is a trust created in a Will and becomes effective upon:
  - a. Execution of the Will.
  - b. Death of the testator.
  - c. Judgment of distribution.
9. If the personal representative has rejected a creditor's claim, the creditor has how many month(s) after service of notice of rejection to bring suit.
  - a. Three (3) months.
  - b. Two (2) months.
  - c. One (1) month.
10. There are how many types of conservatorships? [LPH 1746]
  - a. Three.
  - b. One.
  - c. Two.

### **Definitions:**

Bequeath – To dispose of personal property by Will.

Bequest – A gift of personal property by Will.

Codicil – A supplement to a Will. It may explain, modify, add to, subtract from, qualify, alter, restrain, or revoke provisions of the original Will.

Devise – A gift of real property by Will.

Holographic Will – A will in which the material provisions and the signature are in the handwriting of the testator.

Intestate – One who dies without a valid Will.

Legacy – A gift of personal property by Will.

Pretermitted – In a Will, to let pass without mention or notice, or to omit, for example, to omit mention of one's children.

Testate – One who dies leaving a valid Will.

Testator – The person who makes a Will.



California Certified Legal Secretary  
A Program of LSI®



## APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LSI Membership Card (if applicable), and fees to:  
**CCLS Certifying Board, 14403 Leibacher Avenue, Norwalk, CA 90650**

- (Select one) (Select one)
- Northern California**       **Saturday, October 17, 2015**
- Southern California**       **Saturday, March 19, 2016**

- **Deadline:** Applications must be received 60 days prior to the examination date.
- **Late Application:** Late Fees apply when Applications are received less than 60 days (but not less than 30 days) prior to the examination date, and accepted only if space is available.
- **Deferral:** Requests to defer to the next exam must be received at least 14 days prior to the exam date.

EXAMINATION FEES PAYABLE TO "LSI"			
LSI Members <input type="checkbox"/>		Non-LSI Members <input type="checkbox"/>	
On Time Registration Fee	\$ 25.00	On Time Registration Fee	\$ 75.00
Examination Fee*	100.00	Examination Fee*	100.00
Late Fee (if applicable)	30.00	Late Fee (if applicable)	30.00
<b>TOTAL DUE w/o Late Fee</b>	<b>\$125.00</b>	<b>TOTAL DUE w/o Late Fee</b>	<b>\$175.00</b>

### Personal Information

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

Mailing Address: \_\_\_\_\_

Last 4 digits of SSN: \_\_\_\_\_ Email: \_\_\_\_\_

Phone (Day): \_\_\_\_\_ Phone (Evening): \_\_\_\_\_

LSI Member:  Yes (*enclose copy of LSI Membership Card*)       No

Name of Local LSI Association: \_\_\_\_\_

### Employment Information

Provide your legal secretarial employment information beginning with your most recent (or current) employment in order to confirm that you have at least two years' experience. Attach a supplemental page if you have not been in your current position for two years.

Position: \_\_\_\_\_ Dates of Employment: \_\_\_\_\_

Employer: \_\_\_\_\_  
(name and address)

Supervisor: \_\_\_\_\_ Supervisor's Phone: \_\_\_\_\_

Supervisor's Email: \_\_\_\_\_

Summary of Duties: \_\_\_\_\_

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

Date: \_\_\_\_\_  
Applicant Signature \_\_\_\_\_

\*Fees subject to change without notice.

Rev. March 2015



Submitted by Dawn Forgeur, CCLS, and Lynne Prescott, CCLS

## News & Updates from California Courts

### **SACRAMENTO COUNTY SUPERIOR COURT**

#### **MESSAGE FROM PRESIDING JUDGE ROBERT HIGHT**

The following message from Presiding Judge Robert Hight appeared in the March/April 2015 issue of *Sacramento Lawyer* magazine, and bears repeating for the benefit of support staff, as well as attorneys:

“Judge Hight has two important reminders for all civil litigators. The first is to comply with the court’s Civil Trial Readiness Notification requirement:

Counsel shall notify the court of their readiness to begin their Long Cause Civil Trial and provide information as to the status of the case. Such notification shall be done electronically by completing the form provided on the court’s web page. Re-sending a submission will not overwrite any previously submitted information. All submissions will be read and considered.

Notifications shall be made from 10 court days before the trial date to 1:30 p.m. on the Thursday before the trial date.

Judge Hight also reminds all civil litigators to check the court’s web page for available trial dates before they stipulate to a trial continuance. For example, as of the last week of February 2015, the first available trial date was Monday, August 31, 2015. The court cannot grant a trial continuance – even if it is by stipulation – to any date before the first available trial date. To check available trial dates, go to the court’s web page at <https://www.saccourt.ca.gov/civil/trial-setting.aspx>.

#### **REMINDER RE CIVIL SELF-HELP CENTER**

Reminder that the Civil Self-Help Center provides workshops and individual assistance with a variety of civil legal issues. There are no income requirements to receive the free services. For more information, visit the Civil Self-Help Center - external link web page at <http://www.saclaw.org/pages/cshc-services.aspx>

The Civil Self-Help Center is located in the Sacramento County Public Law Library, 609 9th Street, in downtown Sacramento.

### **PLACER COUNTY SUPERIOR COURT SEEKS VOLUNTEERS FOR GRAND JURY SERVICE**

The Superior Court of California, County of Placer, is seeking applications from Placer County citizens interested in an opportunity to serve on the 2015-2016 Grand Jury. The Grand Jury’s one-year term begins on July 1, 2015, and ends on June 30, 2016. In order to meet the minimum qualifications for service on the Grand Jury, applicants must be United States citizens who are 18 years of age or older, and have resided in Placer County for a minimum of one year immediately prior to becoming a grand juror. Service on the Grand Jury requires a substantial investment of time, usually 40-50 hours per month. For those interested in obtaining more information, the current Grand Jury will be sponsoring two meet and greet sessions on the following dates to discuss the workings of the Grand Jury:

- March 27, 2015, at 3:00 p.m., at the Santucci Justice Center Courthouse, Jury Assembly Room, 2nd Floor, 10820 Justice Center Drive in Roseville.
- April 9, 2015, at 2:00 p.m., at the Grand Jury’s Office, 11532 B Avenue in Auburn.

Additional information and applications for Grand Jury service are available by contacting the Court Executive Office at (916) 408-6186, or by visiting the Court’s website at: [www.placer.courts.ca.gov](http://www.placer.courts.ca.gov). Application Deadline: Friday, May 15, 2015, at 3:00 P.M.

### **EL DORADO COUNTY SUPERIOR COURT**

See the attached Notice of Judicial Assignments from Presiding Judge Suzanne N. Kingsbury.





**SUPERIOR COURT OF CALIFORNIA  
COUNTY OF EL DORADO**

1354 Johnson Boulevard  
South Lake Tahoe, CA 96150

**FILED**

FEB 19 2015

EL DORADO CO. SUPERIOR COURT  
BY *[Signature]*  
(DEPUTY CLERK)

DATE: February 19, 2015  
FROM: Suzanne N. Kingsbury, Presiding Judge  
CLERK: Suzanne M. Thurman

---

**ORDER RE: JUDICIAL ASSIGNMENTS**

---

**EFFECTIVE January 5, 2015, the following judicial assignments are made:**

- Department 1           Honorable James R. Wagoner
- Department 2           Honorable Kenneth J. Melikian
- Department 3           Honorable Suzanne N. Kingsbury
- Department 4           Honorable Steven C. Bailey
- Department 5           Honorable Vicki Ashworth
- Department 7           Honorable Dylan Sullivan
- Department 8           Honorable Nelson Keith Brooks
- Department 9           Honorable Warren Curt Stracener

**FURTHER**, all cases pending in Department 5 as of January 5, 2015 as well as all new West Slope family law matters are assigned to the Honorable Vicki Ashworth for all purposes. All criminal cases pending in Department 7 as of January 5, 2015, as well as all West Slope traffic matters, are assigned to the Honorable Dylan Sullivan.

Dated: 2/19/15

*[Signature of Suzanne N. Kingsbury]*  
\_\_\_\_\_  
SUZANNE N. KINGSBURY  
Presiding Judge

cc: Bench Officers  
Court Administration



COURT OF APPEAL  
FIFTH APPELLATE DISTRICT

STATE OF CALIFORNIA  
2424 VENTURA STREET  
FRESNO, CALIFORNIA 93721-2227

CHARLENE YNSON  
COURT ADMINISTRATOR/CLERK OF THE COURT

BRIAN COTTA  
ASSISTANT COURT ADMINISTRATOR

PHONE (559) 445-5491  
FAX (559) 445-5769

March 16, 2015

## NOTICE RE: ELECTRONIC FILING FOR CIVIL CASES

The Court of Appeal, Fifth Appellate District has amended Local Rule 8 relating to mandatory electronic filing. Of particular importance, documents must comply with part (b) of the amended Local Rule which requires:

"Documents filed electronically must be in PDF format, or readily capable of conversion to PDF format while maintaining original document formatting by TrueFiling to permit text searches and to facilitate transmission and retrieval. If the filer possesses only a paper copy of a document, it may be scanned to convert it to a searchable PDF format. It is the filer's responsibility to ensure that any document filed is complete and readable. No single document shall exceed a total file size of 25 MB. **Document pages must be consecutively numbered beginning from the cover page of the document and using only the Arabic numbering system, as in 1, 2, 3.**

"Briefs must comply with the content and form requirements of California Rules of Court, rule 8.204, with the exception of those provisions dealing exclusively with requirements for paper. **Notwithstanding rule 8.204(b)(7), briefs may not have different numbering systems. The table of contents for each brief shall include electronic bookmarks to each heading in the text. All original proceedings must include electronic bookmarks from the table of contents for each heading in the text, and to the first page of any exhibit(s), with a description of the exhibit included in the bookmark.**

While compliance with this rule is not mandatory until May 11, 2015, the court asks that you please comply now so your electronic documents are in a format that is more useful to the court. If you have any questions regarding this or any other matter relating to electronic filing, please contact Supervising Deputy Clerk Shandra Santana. She can be reached at 559-445-5789. Thank you for your understanding, support and patience!

Charlene Ynson  
Court Administrator/Clerk of the Court

### U.S. Bankruptcy Court

The Local Rules Advisory Committee has proposed various changes to the Local Rules that are now available for public comment. The Court does not necessarily endorse these proposed changes and will not adopt any changes until after receiving all public comments. In accordance with 28 U.S.C. § 2071(b), these proposed amendments are now available on the Court's website. Persons wishing to comment on these proposed amendments to the Local Rules may submit their written comments or recommendations to the address listed below. To be considered, comments must be received not later than the close of business on Friday, April 17, 2015. Comments may be sent in letter form to:

Clerk of Court  
U.S. Bankruptcy Court  
Robert T. Matsui U.S. Courthouse  
501 I Street, Suite 3200 Sacramento, CA 958142322

Comments may also be sent via email to: [localrules@caeb.uscourts.gov](mailto:localrules@caeb.uscourts.gov). Subject line: Comments to Proposed Local Rule Changes



### Attention All 2014-2015 SLSA Officers and Committee Chairmen!

At the April 16, 2015 Membership Meeting, SLSA will install new officers for the 2015-2016 term. This means that the current officers and committee chairmen will need to have all of their files up-to-date, completed, and ready to turn over to their successor if they are not continuing in their current position. Please either bring the files to the April 16 meeting, or arrange to transfer the files at a mutually convenient time. Thank you!

#### **Court Reporters & Conference Rooms In Walnut Creek**

- Conveniently Located
- Easy Freeway Access
- Free Parking

**(925) 932-5200**

Professional Reporting Services  
1600 South Main Street, Suite 125  
Walnut Creek, CA 94596  
Prs@PrsDepo.com | [www.ProRepSvs.com](http://www.ProRepSvs.com)

#### Answers to CCLS Quiz

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



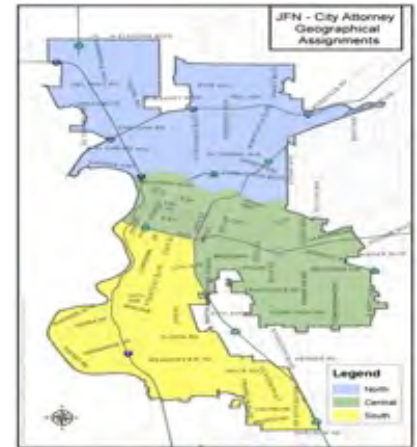
Submitted by Lynne Prescott, CCLS

### **Justice for Neighbors**

The Justice for Neighbors program (JFN) is a task force dedicated to ending threats to public health, safety and welfare of Sacramento neighborhoods.

Sacramento is a diverse city. Each neighborhood has its own rhythm, its own sources of pride, and its own unique concerns. The program focuses on fighting the worst social and criminal nuisances that degrade the quality of life in the City's neighborhoods. Operating under the "broken windows" theory, JFN's aim is to identify, prioritize, and address these criminal problems before they grow into more serious offenses. The program tailors its efforts toward the unique needs of each Sacramento neighborhood.

The JFN team is committed to making Sacramento neighborhoods safe. To learn more about the Justice for Neighbors program, visit the Sacramento City Attorney's website at [www.cityofsacramento.org/CityAttorney/Justice-for-Neighbors](http://www.cityofsacramento.org/CityAttorney/Justice-for-Neighbors).



### **Sacramento Train Depot**

Sacramento's historic train depot is the seventh busiest rail station in the nation. The station's architectural features have earned a spot on the National Register of Historic Places, the California Register of Historical Resources, and the Sacramento Register of Historic and Cultural Resources. The \$30-million renovation will reconfigure the depot to improve passenger flow and space; install modern heating and cooling, plumbing, electrical, lighting, and communications systems; and repair and restore the building's historic architectural features. All work will be performed in accordance with the United States Secretary of Interior's Standards for Rehabilitation, in keeping with the station's historic character. Despite the complexity of the undertaking, the station will remain open and fully operational throughout the renovation.

### **Taxicab Ordinance**

In May of 2014, Sacramento's City Council adopted major amendments to the City's taxicab regulations. The amendments were the culmination of the work done during a taxicab vehicle permit moratorium that lasted almost three years. The resulting ordinance addressed the problem of an overabundance of taxicabs in the City by placing a cap on the number of vehicle permits that can be issued. The ordinance also included several public safety regulations that prohibit queuing, require taxicab driver training, and impose a dress code for taxicab drivers and age limits for taxicab vehicles.

### **SLSA Event Registrations Is Paperless!**

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

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

Thanks for helping us streamline our registration process!



Submitted by Lynne Prescott, CCLS

## AutoCorrect

You know how Word automatically corrects certain words you misspell or mistype? That feature is called AutoCorrect (very creative). It's a nice tool, yes, but can be SO MUCH NICER if you learn to use it to your advantage. Use the feature to help you quickly insert phrases or strings of text that you type every day. For example, to type out my name, I can "program" AutoCorrect to spell out "Lynne Prescott, CCLS" when I type "lp." If your firm has a long name, you can create a quick shortcut for it. Say, your firm is named, "Clued, Inn and Able, LLP" - you can create an entry that results in that when you type "cxa" (the space bar after the last letter of your entry executes the macro). Regarding the shortcuts: use two or more characters, do not use real words, you don't need to use caps, and you can use numbers.

Here's how to create a custom AutoCorrect entry:

1. Word - Click on File > Options
2. In the Word Options dialog box, click the Proofing link on the navigation pane to the right, and then click AutoCorrect Options.
3. Look to the middle of the dialog box, you will see an area checked off to "Replace text as you type."
4. In the Replace box, type your desired shortcut. (Remember: use two or more characters, do not use real words, you don't need to use caps, and you can use numbers).
5. In the With box, type the full phrase (include caps and punctuation) that you want to shortcut to expand into.
6. Click Add
7. Lather, Rinse, and Repeat.
8. Click OK when done.

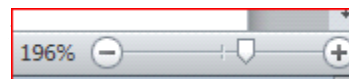
## Pesky Page Proportions

We've all gotten them – from clients and from co-workers – documents that seem to be intended for microfilm or assume that we are reading them from 40,000 feet. The solution may surprise you. You probably know about the slider on the lower-right hand corner of MS Word, otherwise known as ZOOM. And though the solution of clicking "+" or "-" might seem simple enough, the results may not be what you want. Suppose you slip-slide yourself to a really comfortable 219% on your big-as-picture window monitor that is the envy of all the partners? Great. But now email that document to one of those partners who happen to be on his/her tablet. What does he/she get? The word ...

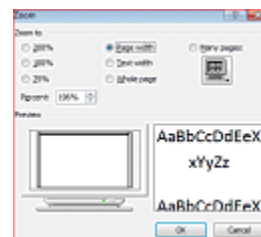
# AND

as large as life. That's because 219% is relative to the screen on which the document is opened and is remembered as a percentage by the document. The solution? A magical setting called "Page Width," which secretly encodes the document with a "just right" setting that translates from screen to screen. This Page Width button is available in several places:

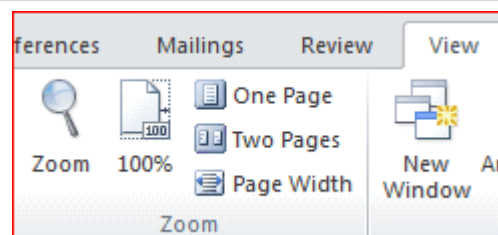
1. Click the Percentage Number next to the slider.



The zoom screen will appear. Click the Page Width Radio Button and then "OK".



2. On the View Ribbon, click the Page Width Button.



Indeed, it would be wise to right-click on this button and add it to your Quick Access Toolbar now. The result is a page proportion pleasing to all – or at least most – and travels well with the document.

### **Keyboard Shortcuts to the ¶ and § Symbols**

For legal professionals, the paragraph and section symbol can be very handy! You can always find the Insert > Symbol > Special Characters, but learn these quick keys as an alternative. (Note – you MUST use the number keypad and have NUM LOCK on for these tips to work).

To input the ¶ Paragraph Symbol, hold Alt, and on the NUMERIC keyboard type its code – 0182.

For the § Section Symbol hold Alt, and on the NUMERIC keyboard type its code – 0167.

### **For those who love keyboard/function key shortcuts, here you go:**

**CTRL + A** Select all  
**CTRL + B** Bold  
**CTRL + C** Copy  
**CTRL + V** Paste  
**CTRL + D** Displays the font dialogue box  
**CTRL + E** Center alignment  
**CTRL + F** Displays the find dialog box, to search the current document  
**CTRL + G** Displays the go to dialog box, to go to a specific location in the current document  
**CTRL + H** Displays the replace dialogue box  
**CTRL + I** Italic  
**CTRL + J** Full justification  
**CTRL + K** Create hyperlink  
**CTRL + L** Left alignment  
**CTRL + N** Creates a new document  
**CTRL + O** Displays the open file dialogue box  
**CTRL + P** Print  
**CTRL + R** Right alignment  
**CTRL + S** Displays the save dialog box  
**CTRL + U** Underline  
**CTRL + V** Paste  
**CTRL + X** Cuts  
**CTRL + Y** Re-do the last undone action  
**CTRL + Z** Undoes the last action  
**CTRL + ENTER** Insert page break

**CTRL + F2** Show print preview  
**CTRL + F4** Closes the active document window  
**CTRL + F6** Opens the next document window  
**SHIFT + F3** Change case  
**CTRL + ]**, **CTRL + [** Grow or shrink font one point  
**CTRL + SHIFT + END** End of document  
**CTRL + END** End of document  
**END** End of line  
**SHIFT + END** End of row  
**ALT + END** End of row  
**ALT + SHIFT + END** End of window  
**ALT + CTRL + 1, 2, 3** Apply heading 1,2,3  
**CTRL + SHIFT + A** All caps

### **NAVIGATING A TABLE**

**TAB** Move to next cell in a row  
**SHIFT + TAB** Move to previous cell in a row  
**ALT + HOME** Move to first cell in a row  
**ALT + END** Move to last cell in a row  
**ALT + PAGE UP** Move to first cell in a column  
**ALT + PAGE DOWN** Move to last cell in a column  
**UP ARROW** Move to previous row  
**DOWN ARROW** Move to next row





Submitted by Lynne Prescott, CCLS

It's almost Tax Time! April 15 is just around the corner. Do you need a tax break by opening an IRA, rolling over some pension/401K funds, or just need some financial planning? If so, you may want to check out the following LSI investment/wealth management advisers and credit union options:

#### **CAPITAL INVESTMENT ADVISERS**

Emerson J. French, CFP, ChFC, CLU, CASL  
5000 E. Spring Street, Suite 200  
Long Beach, CA 90815

Office: (562) 420-9009 or (877) 270-9342

[www.ciadvisers.com](http://www.ciadvisers.com)

Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning

#### **LEGACY WEALTH MANAGEMENT**

Daniel R. Henderson, MBA, CFP  
3478 Buskirk Avenue, Suite 300  
Pleasant Hill, CA 94523

Office: (925) 296-2853 or (877) 679-9784

Fax: (925) 944-5675

E-mail: [daniel@legacywealthmanagement.biz](mailto:daniel@legacywealthmanagement.biz)  
[www.legacywealthmanagement.biz](http://www.legacywealthmanagement.biz)

Offering John Hancock Long Term Care Insurance and Life Insurance Annuities, Retirement, Investment and Estate Planning, Mutual Funds and 401K

#### **DAVID WHITE & ASSOCIATES**

Wealth Accumulation and Preservation  
3150 Crow Canyon Place, Suite 2000  
San Ramon, CA 94583  
(800) 548-2671

Contact: Ryan Gonzales (Ext. 2682)

[rgonzales@dwassociates.com](mailto:rgonzales@dwassociates.com) or

Matt Kay (Ext. 2628), [mkay@dwassociates.com](mailto:mkay@dwassociates.com)

Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance

#### **PROVIDENT CREDIT UNION**

303 Twin Dolphin Drive  
P.O. Box 8007

Redwood City, CA 94603

(800) 632-4699 or (650) 508-0300

[www.providentcu.org](http://www.providentcu.org)

All LSI Members are Eligible to Join.

**Be sure to let your SLSA Governor know if you take advantage of one of these benefit providers so that we can capture Chapter Achievement Points!**

### **LSI CODE OF ETHICS**

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

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



Submitted by Lacy Monserrat, CCLS

Annual Conference is just around the corner in May and with it being held at the Bahia Resort in sunny San Diego, you have the opportunity to take advantage of the many different seminars that LSI has to offer.

Friday morning will bring various officer and chairmen workshops that are free for registered conference attendees. These workshops offer information for local association officers, or those thinking of running for office, on what their jobs entail. There are also chairmen workshops that instruct local chairmen on what their job entails.

Friday afternoon we have four Legal Specialization Section Seminar Seminars being offered, and Saturday will have two more. If you are an SLSA member, these classes are discounted. Please see the registration form for more information.

**Friday, May 15, 2015 1:30 p.m. – 3:30 p.m.**

Criminal Law: The Best and Worst Practices in Criminal Litigation

Civil Litigation: Demystifying the Rules of Evidence

**Friday, May 15, 2015 4:00 p.m. – 6:00 p.m.**

Probate/Estate Planning and Family Law: Crossover Issues in Family Law and Estate Planning

**Saturday, May 16, 4:00 p.m. – 6:00 p.m.**

Law Office Administration: Adobe Training 1 & 2

Transactional Law: The Business of Craft Brewing

You can also sign up for the CCLS/Member Luncheon on Saturday (\$38) and celebrate everyone who has passed the CCLS exam this past year!

Conference registration, hotel information, and the Legal Specialization Section registration forms are in this bulletin but please feel free to email me if you have any other questions about attending!  
governor@slsa.org.

## Every Experience Inspired by Excellence



### Global Litigation Support with a Genuine Local Focus

DeMichelle-Huseby is *simplifying* the way you do business. *HusebyWeb* brings your office to your mobile device allowing you to work anywhere, anytime!

### COURT REPORTING & TRIAL SERVICES

- Web Resource Center
- Secure Web Conferencing
- Mobile Solutions
- Real-time Solutions
- Videography Services
- Interpreting Services
- Transcribing Services Custodian of Records Services
- Document Depository / Repository Services  
... and more!

Call or click today for more information



www.demichelle.com  
Phone: 707.425.6000  
Fax: 707.425.6019  
Email: info@demichelle.com



**CHAPTER ACHIEVEMENT REPORTING FORM 2014-2015**

Each association in LSI participates every year in the Chapter Achievement Points (CAPs) contest, and these points are tracked by SLSA's Governor. This covers activities from April 1, 2014, through March 31, 2015.

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

**Date of Event**

**Event**

- \_\_\_\_\_ I submitted an article to The Legal Secretary magazine. (50 points)
- \_\_\_\_\_ I attended an LSI Quarterly or Annual Conference. (50 points)
- \_\_\_\_\_ I attended an Officer/Chairman Workshop at the Annual Conference.  
How many? \_\_\_\_\_ (25 points)
- \_\_\_\_\_ I rented a car through Hertz with the LSI discount. (200 points)
- \_\_\_\_\_ I took the CCLS exam – Test Date: \_\_\_\_\_. (100 points)
- \_\_\_\_\_ I passed the CCLS exam – Test Date: \_\_\_\_\_. (200 points)
- \_\_\_\_\_ I recertified as a CCLS during the 2014-2015 fiscal year. (50 points)
- \_\_\_\_\_ I attended another association's monthly meeting, installation, or other function.  
(50 points)
- \_\_\_\_\_ I attended an educational workshop or seminar sponsored by SLSA or another local  
association. (25 points)
- \_\_\_\_\_ I attended an educational workshop or seminar sponsored by a Forum, CEB, or  
The Rutter Group. (25 points)
- \_\_\_\_\_ I am a member of at least one Legal Specialization Section. (50 points)
- \_\_\_\_\_ I am a member of all six Legal Specialization Sections as of March 31, 2015. (100 points)
- \_\_\_\_\_ I attended a Legal Specialization Section Seminar at Quarterly or Annual  
Conference. How many? \_\_\_\_\_. (50 points per seminar)
- \_\_\_\_\_ I submitted an article for use in a Legal Specialization Section newsletter. (50 points)
- \_\_\_\_\_ I purchased the Legal Professional's Handbook (LPH). (200 points)
- \_\_\_\_\_ I purchased the Law Office Procedures Manual (LOPM). (200 points)
- \_\_\_\_\_ I purchased updates to the LPH. (100 points)
- \_\_\_\_\_ I purchased updates to the LOPM. (100 points)

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Sacramento LSA  
Attn: Lacy A. Monserrat, Governor  
Messing Adam & Jasmine LLP  
980 9th Street, Suite 380  
Sacramento, CA 95814  
[governor@slsa.org](mailto:governor@slsa.org)

## Chapter Achievement Points



Submitted by Lacy Monserrat, CCLS

The fiscal year for accumulating Chapter Achievement Points (CAPs) is from April 1 to March 31 each year. I want to thank everyone who has forwarded me their activities throughout the year and helped SLSA accumulate as many CAPs as we could! I am still finalizing our counts and I'm hopeful that we will make a good showing at Annual Conference this year.

## Editor's Note



Submitted by Corene Rodder

I would like to thank Lynne Prescott, CCLS, and SLSA for offering me the opportunity to be the editor of *The Legal Eagle*. As editor, it has been my pleasure to participate in promoting and supporting SLSA. It has been my privilege to serve and I look forward to my next chapter with SLSA.

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

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

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



**BENEFITS  
LEGAL SECRETARIES INCORPORATED (LSI)**

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

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

**QUESTIONS AND CONCERNS, CONTACT:**

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

**LEGAL SECRETARIES, INCORPORATED  
MEMBERSHIP LIST AS OF 01/31/15**

Total Members (Fiscal Year-end 4/30/14)	Association		New Members	Transfer Members	Continuing Members	Total Members
42	Alameda County	LSA	11		27	38
6	Antelope Valley	LSA	0		6	6
40	Beverly Hills/Century City	LSA	5		31	36
15	Butte County	LPA	0		4	4
17	Conejo Valley	LPA	2		13	15
15	Desert Palm	LPA	11		14	25
17	El Dorado County	LPA	5		14	19
71	Fresno County	LPA	49	-1	42	90
37	Humboldt County	LPA	2		28	30
36	Imperial County	LPA	4		15	19
33	Livermore-Amador Valley	LPA	0	-1	19	18
55	Long Beach	LPA	7		40	47
58	Los Angeles	LSA	22		45	67
33	Marin County	LPA	5		22	27
38	Merced County	LPA	9		34	43
0	Monterey County	LSA	0		0	0
60	Mt. Diablo	LPA	7		48	55
14	Napa County	LSA	0		14	14
82	Orange County	LSA	23		49	72
24	Placer County	LPA	4	1	14	19
1	Redding	LPA	0		1	1
18	Rio Hondo District	LPA	5		12	17
19	Riverside	LPA	6		14	20
168	Sacramento	LSA	45		100	145
217	San Diego	LSA	43		161	204
55	San Fernando Valley	LSA	0		27	27
84	San Francisco	LPA	23	2	70	95
41	San Gabriel Valley	LSA	7		25	32
72	San Mateo County	LSA	5	-1	43	47
24	Santa Barbara	LPA	5		15	20
84	Santa Clara County	LSA	29		55	84
6	Santa Cruz County	LPA	0		5	5
20	Santa Maria	LPA	9		12	21
30	Sonoma County	LSA	5		22	27
7	Southern Butte	LSA	2		7	9
36	Stanislaus County	LPA	8		30	38
27	Stockton-San Joaquin	LPA	1		26	27
4	Trinity County	LSA	0		4	4
23	Ventura County	LPA	2		13	15
46	Members at Large		8		16	24
1675	<b>YTD TOTALS</b>					<b>1506</b>

MEMBERSHIP LIST 3rd QUARTER (01-31-15)

**LEGAL SECRETARIES, INCORPORATED**

# LEGAL PROFESSIONAL'S HANDBOOK FOR CALIFORNIA LAW PRACTICE

compiled by Legal Secretaries, Incorporated  
published by The Rutter Group



## LEGAL STAFF'S ULTIMATE RESOURCE GUIDE FOR OVER 75 YEARS!

**STEP-BY-STEP GUIDANCE:** Step-by-step instructions for each major area of law practice; shows deadlines, fees, number of copies, addresses and all the other details needed to do the job right the first time!

**FORMS:** Judicial Council forms are included, plus practice-tested forms for pleadings, motions, business documents, transmittal letters, etc.

**RELIABLE:** The Handbook is written and reviewed by experienced legal secretaries, attorneys, and judges. The Publications Revision Committee has years of practical know-how and expertise in each area covered in the Handbook.

**UP-TO-DATE:** The Handbook covers the current statutes and court rules. It is kept up-to-date by the Publications Revision Committee through annual updates.

2 Volumes

LSI Members-Only Price: **\$250.60**

Nonmembers Price: **\$358**

*Price includes shipping.*

Updated annually for subscribers  
by replacement pages.

## CONTENTS

- California Court System
- Statutes of Limitation/Jurisdiction
- Attachment/Other Provisional Remedies
- Commencement of Civil Actions
- Discovery in Civil Actions
- Pretrial and Judgment in Civil Actions
- Postjudgment Proceedings
- Civil Appeals and Writs
- ADR
- Foreclosures: Mortgages and Trust Deeds; Mechanic's Lien
- Unlawful Detainer
- Federal Civil Procedure and Appeals
- Bankruptcy
- Family Law
- Adoptions
- Criminal Law and Procedure
- Probate Proceedings: Decedents' Estates; Guardianships/Conservatorships; Trust Law
- Workers' Compensation
- California Commercial Code
- Corporations
- Limited Partnerships
- Intellectual Property Law: Copyrights; Trademarks; Patents
- Miscellaneous General Information

## LEGAL PROFESSIONAL'S HANDBOOK ORDER FORM

TITLE	PRICE	QTY.	SUBTOTAL	TAX	AMOUNT
Legal Professional's Handbook	\$250.60 (LSI Members-Only Price)				
Legal Professional's Handbook	\$358 (Nonmembers Price)				

**MY PAYMENT IS ENCLOSED.** 45-day return privileges apply.

**PLEASE BILL ME.** 45-day return privileges apply.

NAME \_\_\_\_\_ PHONE (\_\_\_\_) \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_ STATE BAR NUMBER \_\_\_\_\_

FIRM \_\_\_\_\_

ADDRESS \_\_\_\_\_ SUITE \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

Enclosed is my check for \$ \_\_\_\_\_ payable to **THE RUTTER GROUP**

Charge \$ \_\_\_\_\_ on my  VISA  MASTERCARD  AMERICAN EXPRESS

CREDIT CARD NUMBER \_\_\_\_\_ EXP. DATE \_\_\_\_\_

SIGNATURE (required for all orders) \_\_\_\_\_

**To order or for more information, call 1-800-747-3161 (ext. 2)  
or visit [www.RutterGroup.com](http://www.RutterGroup.com)**

OR Mail to **THE RUTTER GROUP**, 15760 Ventura Blvd., Suite 530 • Encino, CA 91436 • OR fax to **1-818-377-7839**

**YES, I WANT TO SUBSCRIBE to this title with Updates,** new editions and/or supplements automatically shipped to me until I cancel my subscription. I will be billed separately at then-current rates for these Updates, plus tax. **See back side for Subscription Details and other terms and conditions.**

If you do not check this box, this title will be processed as a one-time order, and you will not receive automatic Updates.

This title is updated annually by replacement pages.

 **THE RUTTER GROUP**

 **THOMSON REUTERS**

LEGAL SECRETARIES, INCORPORATED

# LAW OFFICE PROCEDURES MANUAL FOR CALIFORNIA LAW PRACTICE

compiled by Legal Secretaries, Incorporated  
published by The Rutter Group



**THE IDEAL TRAINING MANUAL FOR NEW STAFF!  
QUICK REFERENCE FOR EXPERIENCED STAFF!**

**The Problem:** Training new law office staff members is time-consuming and expensive. The adequacy of the training is often dependent on the ability of the existing staff. Loss of key personnel may make it impossible to train and supervise less experienced staff.

**The Solution:** A system for training new staff and a reference source for all existing office personnel. The *Law Office Procedures Manual*, created by Legal Secretaries, Incorporated, provides everything you need to know about the forms, rules and procedures required in a law office.

**STEP-BY-STEP GUIDANCE:** The Manual covers each major area of law practice.

**FORMS:** The Manual includes the major Judicial Council forms, plus typical attorney-drafted forms. *Sample forms are filled out* to illustrate common applications.

**UP-TO-DATE:** The Manual is updated twice a year to include revised Judicial Council forms and other changes in applicable rules and procedures.

1 Volume

LSI Members-Only Price: **\$150.50**

Nonmembers Price: **\$215**

Price includes shipping.

Updated biannually for subscribers  
by replacement pages.

## CONTENTS

- Court Structure
- Civil Procedure
- Local Rules
- Discovery
- Unlawful Detainer
- Real Estate
- Criminal
- Family Law

- Adoptions
- Probate
- Conservatorships and Guardianships
- Corporations and Limited Liability Companies
- Bankruptcy [to be added in 2013]
- Miscellaneous: Practice Tips; Service and Proof of Service; Fax Filings; Verifications; Substitution/Association of Counsel;

- Notarial Acknowledgments; Recording Laws; Forms of Address; U.S. Postal Service Addressing Standards and State Code Abbreviations; Transcription and Proofreading; Alphabetic Filing Rules; Calendars; Legal Abbreviations and Jargon; Office Procedures; Reference Materials
- Glossary

## LAW OFFICE PROCEDURES MANUAL ORDER FORM

TITLE	PRICE	QTY.	SUBTOTAL	TAX	AMOUNT
Law Office Procedures Manual	\$150.50 (LSI Members-Only Price)				
Law Office Procedures Manual	\$215 (Nonmembers Price)				

- MY PAYMENT IS ENCLOSED.** 45-day return privileges apply.
- PLEASE BILL ME.** 45-day return privileges apply.

NAME \_\_\_\_\_ PHONE (\_\_\_\_) \_\_\_\_\_

E-MAIL ADDRESS \_\_\_\_\_ STATE BAR NUMBER \_\_\_\_\_

FIRM \_\_\_\_\_

ADDRESS \_\_\_\_\_ SUITE \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

Enclosed is my check for \$ \_\_\_\_\_ payable to **THE RUTTER GROUP**

Change \$ \_\_\_\_\_ on my  VISA  MASTERCARD  AMERICAN EXPRESS

CREDIT CARD NUMBER \_\_\_\_\_ EXP. DATE \_\_\_\_\_

SIGNATURE (required for all orders) \_\_\_\_\_

**To order or for more information, call 1-800-747-3161 (ext. 2)**

**or visit [www.RutterGroup.com](http://www.RutterGroup.com)**

OR Mail to **THE RUTTER GROUP**: 15760 Ventura Blvd. Suite 630 • Encino, CA 91436 • OR fax to 1-818-377-7839

**YES, I WANT TO SUBSCRIBE to this title with Updates**, new editions and/or supplements automatically shipped to me until I cancel my subscription. I will be billed separately at then-current rates for these Updates, plus tax. **See back side for Subscription Details and other terms and conditions.**

If you do not check this box, this title will be processed as a one-time order, and you will not receive automatic Updates.

This title is updated biannually by replacement pages.

**THE RUTTER GROUP**

**THOMSON REUTERS**



Submitted by Jaymie Moralez

This free benefit offered by SLSA provides the legal community with a place to post job openings for all categories of job positions.

SLSA assists in every possible manner to procure employment for members of this association and cooperates with attorneys in filling positions in law offices, but in no event does this committee act as an employment agency.

Employers desiring/needing to place an advertisement for employment on SLSA's website may view the "Employment Opportunities" page on this website and format the advertisement like those already posted. Employers will also need to give the following information to the Employment Chair: name, firm name, address, phone number(s), areas of law practice, software used, position available, and years of experience required. The attorney/employer is requested to e-mail the Employment Chair with the advertisement formatted like those currently posted on the "Employment Opportunities" page. Advertisements for employment are usually posted as soon as possible.

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

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

**Full-Time Receptionist/Billing Clerk.** A boutique two attorney Family Law and Mediation firm in Roseville is looking for a full-time receptionist/billing clerk to join our firm starting in May 2015. The ideal candidate would be reliable, have a positive attitude, be organized, self-motivated, and able to multi-task with minimal supervision. A strong desire to provide excellent customer service is required, as is a sense of humor and ability to excel under pressure. Duties will include answering phones, communicating with clients, calendaring appointments, filing, billing entry, proofreading, and general office administrative tasks. At least one year of law experience is preferred. Specific experience in Family Law is favored. If interested, please reply to [reception@jamisonfamlaw.com](mailto:reception@jamisonfamlaw.com) with a resume, cover letter with (3) professional references, and salary requirements.

**Litigation Secretary.** National law firm seeking experienced litigation secretary to work with a team doing complex construction litigation. Candidates must be very knowledgeable with state and federal filings, rules of court, and procedure. Candidates must be proficient with calendaring in an automated program. Candidates should have the proven ability to work well with a team of three lawyers. Candidates must have flexibility to work some overtime. This position will require good communication skills with clients and team. Time management and organization skills are much required. This will be an excellent opportunity for someone with a desire to take great interest in the attorneys' practice and work. Minimum experience includes: 5 years of litigation (in California) preferred, excellent word processing skills (70+ wpm), advanced skills in Word and Outlook, calendaring trials, etc. in an automated system, able to prepare TOA and TOC, unflappable disposition. Please e-mail cover letter and resume to [sachr@lbbslaw.com](mailto:sachr@lbbslaw.com).

**Civil Litigation Secretary.** Realize your potential as a professional in the legal industry! Growing downtown law firm seeks a full-time Civil Litigation Legal Secretary with a minimum of 4 years of experience. Come join our team and you will have the opportunity to work with a dynamic and talented group in our growing

Sacramento office. We provide support in a friendly, team-oriented value-based culture which allows for immediate responsibility and growth potential. Please visit [www.klinedinstlaw.com/careers](http://www.klinedinstlaw.com/careers) for additional information.

**Operations Coordinator (Sacramento Location).** Esquire Deposition Solutions is hiring an Operations Coordinator for their Sacramento location. For full position description and how to apply, please visit their website: <http://www.esquiresolutions.com/About-Us/careers.aspx>.

**Litigation Legal Secretary.** Stoel Rives LLP is seeking a litigation legal secretary for its Sacramento office to provide support to attorneys. Apply online at [www.stoel.com](http://www.stoel.com). Duties include: Extensive word processing, including revision to complex documents, pleadings and comparisons, drafting documents, daily file retrieval and filing of e-mails and other documents, opening new matters, managing proforma and mailing invoices, maintaining calendars, expense management, entering billable time on a daily basis, managing complex documents and discovery, and case management. Essential qualifications, skills, and abilities include the following: Strong technology skills, including litigation management software, knowledge of state and federal court rules and procedures, ability to manage substantial litigation matters and deadlines, superb organizational and administrative skills, outstanding attention to detail, work well under pressure, excellent written and verbal communication skills, team-oriented and flexible. Proficient in Microsoft Office Suite. Minimum of five years of litigation experience. EEO.

**Litigation Legal Secretary.** The Law Office of Christian Green, a CNA Staff Counsel located in Sacramento, is seeking a litigation legal secretary. This role will support two attorneys in Sacramento who handle Healthcare Professional Liability, Construction Defects and High Exposure cases, and will provide overflow support for three other attorneys and paralegals in the Sacramento and San Francisco offices. This position will handle tort matters, will require transcription of dictation, and mail handling. This role, under general supervision, assists attorneys and other legal staff by providing legal administrative support, which includes all aspects of document preparation, and coordination of schedules and calendars for attorneys and case work. Collaboratively works with Claim, Claim Legal, and clients as well as other third parties to produce desired results. **Essential Duties & Responsibilities:** Handles all aspects of document preparation. Drafts, prepares, and distributes legal correspondence and memoranda under management/attorney direction. Files documents timely and appropriately with courts and other parties. Collaboratively assists in gathering and organizing exhibits, documents, trial data and other materials in response to subpoenas, discovery requests, interrogatories, motions for summary judgment, etc. Organizes and maintains files (electronic, paper, and other) and legal archives. Schedules and coordinates attorney and case load calendars. May perform additional duties as assigned. **Skills, Knowledge & Abilities:** In-depth knowledge of legal terminology, procedures, and practices as well as overall general knowledge of the insurance industry and the business units. Excellent internal/external customer interactive skills. Strong computer skills including Microsoft Office Suite and other business related software systems. Excellent organizational skills including ability to prioritize and coordinate multiple tasks. Excellent written and verbal communication skills including professional phone etiquette and the ability to draft complex written correspondence. Acts with a sense of urgency to advance priorities of the organization. **Education & Experience:** Associates degree with course work or applicable certifications preferred or equivalent experience. Typically a minimum four years of experience in a related legal administrative environment. If interested, please email your resume to [christian.green@cna.com](mailto:christian.green@cna.com).

**Experienced Litigation Secretary (Sacramento).** Seeking an experienced 5+ years of experience as a legal secretary for busy partner and two associates with litigation practice in the area of construction litigation, mechanics liens, stop notices, and related bond claims for private and public construction projects, premises liability, real property claims, business litigation, and insurance coverage for personal and commercial liability carriers. Requires 75+ wpm typing, knowledge of MS Office applications, Abacus time/calendaring system a plus, and Adobe. Must be able to handle a busy desk, keeping track of busy calendars, and attention to detail. Must have knowledge in e-filing, fax-filing and be familiar with both state and federal courts. Salary commensurate with experience. We offer a pleasant work environment with health, dental, and disability benefits. E-mail your resume and cover letter to [bkeddie@ewwsllp.com](mailto:bkeddie@ewwsllp.com). Please do not contact by telephone.



**Administrative Assistant to County Counsel (Sutter County).** Duties may include, but are not limited to the following: Utilizes a computer to enter, store, and/or retrieve information; types materials into form from typed or handwritten copy or machine dictation using a variety of complicated formats for preparing legal documents, correspondence, reports, and forms; assumes responsibility for correctness of spelling, punctuation, format, and grammar; reviews, edits, types, records, and processes a large variety of legal documents and records; reviews documents to verify accuracy and complete information; coordinates the petitioning of conservatorship renewals; ensures proper medical affidavits and testimonies are obtained; prepares initial and annual conservatorship documents in a form suitable for filing with the court; prepares land use documents for submission to Board of Supervisors; maintains calendars for court appearances, arranges appointments and meetings, and advises attorneys accordingly; manages and organizes dependency files; scans and organizes digital case files; provides direction to, coordinates and reviews work of clerical staff; reviews, verifies, and processes invoices for payment; prepares funds received for deposit; monitors budget; compiles data to assist department head in preparing budget documents; screens and independently handles calls and visitors. Education and Experience: Four years of increasingly responsible experience in a legal office; or any combination of education and experience that provides equivalent knowledge, skills, and abilities. Additional requirements available at: [www.suttercounty.org/doc/government/depts/hr/hr\\_jobs](http://www.suttercounty.org/doc/government/depts/hr/hr_jobs).

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

**File Clerk/Receptionist.** Sacramento Civil Litigation defense firm has immediate opening for a full-time File Clerk/Jr. Assistant. Duties include sorting daily mail, calendaring and confirming appearances, organizing and maintaining physical files, indexing files on computer, completing all projects as assigned by lead secretary, photocopying, and scanning of documents to files. Court runs and other runs as needed – must have reliable car and insurance. Must be personable and have a professional demeanor. Candidate must be reliable and able to work independently. Some legal experience required, on-the-job training available. Please submit resume to Mary Bernard at [hrjobs@beutlercorp.com](mailto:hrjobs@beutlercorp.com).

**Experienced Litigation Secretary (Sacramento).** Sacramento law firm seeks an experienced litigation secretary, minimum 5 years of experience as a legal secretary. Duties/Experience Required include: heavy typing (minimum 90 words per minute); preparation and electronic filing of legal pleadings; data entry; managing attorney calendars; correspondence and communication with clients, courts, and attorneys. This position requires in-depth knowledge of WordPerfect, Outlook, Sage Timeslips, and Adobe. Knowledge of federal and state rules of court and civil procedure is necessary. Applicants must be able to work under deadlines, communicate effectively, and have exceptional attention to detail and accuracy. Problem-solving skills, a good memory, and organization are a must for this busy desk. We are located in Sacramento in the Howe Avenue / Fair Oaks Boulevard vicinity. We are a bankruptcy firm that has a select group of clients that we serve, not the general public. Bankruptcy experience is desired. Please submit cover letter, resume, references, and salary requirements to [bushsusie@gmail.com](mailto:bushsusie@gmail.com) for consideration. Please detail in your cover letter what specific experience that you have that corresponds with the duties listed above. Please only reply to this ad if you have the skills listed in the experience required section.

**Public Defender Administrative Services Director (Merced County).** Duties may include, but are not limited to the following: develop, administer, and ensure proper expenditure controls for the departmental budget; coordinate legislative and regulation analysis to determine impact on department; comply with grant application requirements and implement grant objectives; ensure department compliance with judicial and legislative requirements; coordinate and carry out special projects related to department functions; analyze department operations and services for cost benefits and efficient operations; provide supervision, training, development, and work evaluation of management staff; represent the Public Defender with the public, community organizations, and other government agencies; may act for the Public Defender on administrative matters as delegated.

**Minimum Qualifications.** Experience: three (3) years of progressively responsible professional staff or management level experience in personnel management, budget preparation and control, and facility management which has included responsibility for supervision of staff. Education: equivalent to completion of a four (4) year degree in Business Administration, Public Administration, or a closely related field. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.) Link:

<http://agency.governmentjobs.com/merced/default.cfm>.

**Part-Time Litigation Secretary.** Donahue Davies LLP, a well-established Folsom area 12 attorney Insurance Defense/Litigation Firm is seeking an experienced and knowledgeable litigation secretary who is organized, detail-oriented, professional, able to efficiently multi-task, and has proven experience working with a managing partner plus two attorneys. Qualifications include: 5+ years current experience in insurance/litigation defense, excellent communication skills, advanced skills in MS Word, Outlook, and Excel. Current knowledge of state and federal court rules is mandatory, as well as efficiency in an automated calendaring program. The firm offers competitive salary and benefits. Please include salary requirements when submitting cover letter, resume, and professional references to [cdavis@donahuedavies.com](mailto:cdavis@donahuedavies.com).



## SLSA Executive Board 2014 - 2015



**President**  
Lynne Prescott,  
CCLS  
(916) 551-3360  
president@slsa.org



**Vice President**  
Crystal Rivera  
(916) 446-7979  
vicepresident@slsa.org



**Secretary**  
Jennifer  
Estabrook, CCLS  
(916) 442-0033  
secretary@  
slsa.org



**Treasurer**  
Elizabeth Madden,  
CCLS  
(916) 847-2953  
treasurer@slsa.org



**Governor**  
Lacy Monserrat,  
CCLS  
(916) 551-3302  
Governor@slsa.org



**Parliamentarian**  
Astrid Watterson,  
CCLS  
parliamentarian@  
slsa.org



**Executive Advisor**  
Dawn Forgeur, CCLS  
(916) 319-4786  
executiveadvisor@  
slsa.org

### **OUR MISSION STATEMENT**

Sacramento Legal Secretaries Association ("SLSA") is a nonprofit, educational organization whose purpose is to further knowledge of law and its procedures, promote a high standard of ethics, encourage a statewide networking system, and advance the interests of our members and the legal community.

*Save the Date!*

*September 17, 2015*

SLSA's

~1940



2015~



Free Pickup & Delivery in the Greater Sacramento Area

Available 24 hours a day — Seven days a week!

No Rush Fees

**(916) 449-2820**

Electronic Discovery

Web Hosting

Litigation Copying

Litigation Scanning

Bates Numbering

On-Site Copying & Scanning

Coding

Banner and Court Exhibit Boards

Labeling

Oversized Copying, Scanning & Printing

Binding

Color Copying, Scanning & Printing

High Volume Copying

Video & Audio Duplication

X-Ray Duplication & Scanning

File Conversion



555 Capitol Mall, Suite 235 • Sacramento, CA 95814 • (916) 449-2820  
[www.Capitol-Digital.com](http://www.Capitol-Digital.com)