

THE LEGAL EAGLE

Book 23, Issue No. 1

JUNE 2022



LPI's First Male
President
Rod Cardinale, Jr.

In Person
Meetings are
Back!

SLSA's
New
Executive
Board

A Rising Star:
Christie
Kaelber

**SUMMER
COURT SERIES**



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

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WHY ARE WE DIFFERENT?

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

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

WHAT OTHER FIRMS HAVE TO SAY

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

– Chad Coleman / Coleman Chavez & Allen LLP

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

– Jeffery Owensby / Rediger McHugh & Hubbert

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

– Greg Valenza / Shaw Valenza LLP

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From the Editor

The Legal Eagle welcomes letters and article suggestions from readers. Please send them to Lynne Prescott at president@slsa.org. Sacramento Legal Secretaries Association reserves the right to edit articles and letters sent in for publication. The deadline for all submittals is noted in "Dates to Remember" section of this publication. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is distributed with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If legal advice or other expert assistance is required, the service of a competent, professional person should be sought. The opinions expressed in the articles published herein are those of the individuals submitting the articles and not necessarily the views of the board or editorial staff. This publication may not be reproduced in whole or in part without the express written consent of the board of Sacramento Legal Secretaries Association.

Sacramento Legal Secretaries Association



General Membership Dinner Meeting

Thursday, June 16, 2022 - 6:15 p.m. – 8:00 p.m.

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

BLACK BEAR DINER – 2700 El Centro Road, Sacramento

FINANCIAL PLANNING TIPS FOR EVERYDAY LIVING ... A Lawyer's Personal Perspective

*What is financial planning? Why is it important?
Is it only for the wealthy?
What are some tips for successful planning?*

Guest Speaker:
Matthew Ellis, Partner
Downey Brand LLP



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

Special Bring One, Get One (BOGO) Promotion!

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

Register Today!

Deadline to RSVP: Tuesday, June 14, 2022

Two Ways to Register:

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

Registration Fee:

\$30 SLSA Members and Non-Members

Make checks payable to "SLSA" and mail to:

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

Dinner Menu – Choice of:

Shasta Cheeseburger

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

Tri-Tip Dip

Tri-tip, thinly sliced and stacked tall on a Tribeca roll

Reuben Sandwich

Corned beef on a grilled rye bread, Swiss cheese, 1000 Island dressing and sauerkraut

Veggie Burger

Lettuce, onion, tomato, mayo, 1000 Island dressing

Salad

Crispy chicken cobb salad or bacon cheeseburger salad

Thank You to our June Vendor Partner



Bring One, Get One!

SLSA Wants You to
Get Your BOGO On!

BRING 1, GET 1

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

So, Bring One and Get One!



But Wait, There's More!

In order for SLSA to reclaim, rebuild, and reemerge, we need to hear from you. Otherwise, we are just making our best guess at what you want from this association. You pay dues for a reason, so tell us what that reason is. Let us help you get the most bang for your educational and professional development buck! Please help us help you by completing the SLSA Online Feedback Form. **All completed feedback forms will be entered into a drawing for a \$50 Amazon Gift Card! Winner announced in July issue of The Legal Eagle!**

https://docs.google.com/forms/d/e/1FAIpQLScBzRn29bzppG7Sc_ojGdu-BF9yrqFPzS9GrQ6E1YUVNstqwA/viewform?usp=sf_link

SLSA'S EXECUTIVE BOARD



Lynne Prescott, CCLS
President
president@slsa.org



Corene Rodder
Governor
governor@slsa.org

your
TEAM



Crystal Rivera
Vice President
vicepresident@slsa.org

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



Dawn Willis
Parliamentarian
parliamentarian@slsa.org



Sarah Martinez
Secretary
secretary@slsa.org



Christie Kaelber
Treasurer
Treasurer@slsa.org



Marci Frazier
Executive Advisor
executiveadvisor@slsa.org

Summer Court Series



LSS SUMMER COURT SERIES

JUNE 2022

06.02.2022 - USDC, Northern District Court

06.23.2022 - Santa Clara Superior Court

06.30.2022 - El Dorado Superior Court

JULY 2022

07.07.2022 - San Joaquin Superior Court

07.14.2022 - San Diego Superior Court

07.21.2022 - USDC, Southern District Court

AUGUST 2022

08.04.2022 - Los Angeles Superior Court

08.11.2022 - Placer Superior Court

08.18.2022 - USDC, Central District Court

SEPTEMBER 2022

09.29.2022 - Sacramento Superior Court



The cost to attend each webinar is as follows:

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

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



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



President's Message

By Lynne Prescott, CCLS, SLSA President

"Our Finest Hour"

Winston Churchill said, during his famous speech "Their Finest Hour," to the House of Commons on June 18, 1940:

"Upon this battle depends the survival of Christian civilization. Upon it depends our own British life, and the long continuity of our institutions and our Empire. . . . Let us therefore brace ourselves to our duties, and so bear ourselves that if the British Empire and its Commonwealth last for a thousand years, men will still say, 'This was their Finest Hour.'"

The term "Their Finest Hour," has even been defined by Wikipedia as "a point in time or a relatively brief period of time when an especially distinguished, admirable, or effective set of actions is performed."

The last two years of the COVID pandemic presented us - - SLSA - - with a choice. We could either inspire the members through action or leave them paralyzed in the face of seemingly overwhelming odds. Rather than view the challenges of the pandemic as barriers, we viewed them as opportunities. And so, as Churchill said, we "braced ourselves to our duties," and declared that "we shall never surrender."

And surrender we did not. I am so proud of the officers and chairpersons of this organization for upholding SLSA's mission of providing continuing education and professional networking opportunities to the legal professionals in our area.

Our first goal this year is to return to in-person meetings, while offering a Zoom option when possible. We began doing this at the April 2022 Membership Meeting and hope to continue the hybrid format for those who are unable to attend in person. Your continuing legal education is important, and we want to make that available to you in as many ways as possible.

The second goal is to reclaim what COVID has taken from us: our members. If you will commit to renewing your membership and walking alongside us, I know that we can rebuild and reemerge stronger than ever.

Thank you for the honor of serving you.

Thank you for working shoulder-to-shoulder with me and the SLSA Executive Board during one of the most difficult times in this organization's history. Your dedication to our mission and purpose, endless resourcefulness, inspiring ingenuity, unfailing commitment, strength of heart, and indomitable spirit are part of our great legacy.

With your help and commitment, we will reclaim what has been taken from us, rebuild on what we have learned, and re-emerge as the educational beacon we have been for legal professionals in this community for 82 years. This is, indeed, our finest hour.

In Person Meetings are Back

And We've Got a New Location!

SLSA held its first completely in-person meeting in over two years on April 21, 2022, at the Black Bear Diner in Natomas. There were ___ in-person attendees and __ attended via Zoom.

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

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

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

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



Black Bear Diner

Membership Renewal



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

No late fee if you renew by June 30!

Dates to Remember

June 14, 2022 6:00 PM	Executive Board Meeting Location TBA
June 16, 2022 5:30 PM 6:15 PM	SLSA Membership Meeting – Black Bear Diner, 2700 El Centro Rd., Sacramento <ul style="list-style-type: none">• Meet & Greet• Dinner & Business Meeting• Educational Presentation by Matthew Ellis, Esq. - Downey Brand LLP “Financial Planning Tips for Everyday Living . . . A Lawyer’s Personal Perspective”
June 19, 2022	Happy Father’s Day!
June 20, 2022	Juneteenth (Federal Courts Closed)
June 30, 2022	Last Day to Renew SLSA Membership Without Incurring Late Fee

SLSA's Rising Star: Christie Kaelber

Stars have often been used as a metaphor for aspiration, brilliance, beauty, guidance and direction. They light up the sky at night, and they serve as a tool for navigating.

In April 2022, SLSA honored one of its own as a Rising Star. Christie Kaelber has always been a shining example of joyful work. She aspires for greatness in all she does. She always gives of herself and asks, What more can I do? She is someone who, in spite of her initial trepidation and hesitancy, decided to assume a role of leadership by joining the SLSA executive board as Treasurer. Congratulations Christie, SLSA's Rising Star!



Congratulations, Christie!
RISING STAR AWARD RECIPIENT 2021-2022

Member News



June Birthdays

Andrea Lovgren 6/4

Anne French 6/6

Lelia Jackson 6/7

Dana Reeder 6/17

Vicki Rathke 6/20

Yolanda Delacruz 6/22

Crystal Rivera 6/27

Sherrell Hill 6/27

Julie Reece 6/27

Jamie Gifford 6/29

Annual Conference Appointments and Winners

Brenda Johnson, CCLS – LPI CCLS Certifying Board Chair

Dawn Forgeur, CCLS – LPI Tech Chair

Lynne Prescott, CCLS – LPI Executive Advisor

Corene Rodder – 3rd Place LPI Bulletin Contest

SLSA – 2nd Place LPI Chapter Achievement Contest

SLSA - Winner of CCLS Exam Fee Waiver

Congratulations!

Mr. President: Stronger Together

Rod Cardinale, Jr.
Santa Clara County LPA



On May 22, 2022, at LPI's 88th Annual Conference of Delegates and Board of Governors Meeting in Santa Clara, California, Rod was installed as LPI's 48th President, the first male to serve in that role in the corporation's 88-year history. The following is an excerpt from an article that originally appeared in the May 2019 issue of The Legal Secretary.

Rod Cardinale, Jr., entered the legal profession in January 2008, after graduating with his paralegal degree. The first local association event he attended was a Santa Clara County LPA general membership meeting in June 2008, where he was invited by the President of SCCoLPA (who happened to be one of his professors at paralegal school). He says he only attended that one meeting and didn't attend another until August of 2009, after which he attended two more meetings, and at the third one he was installed as President.

The first LPI Conference Rod attended was Annual Conference in May 2010. Christa Davis was the outgoing President and Brooke Mansfield was the incoming President. He says, "I remember having such a great time. I told Elise Dresser, CCLS, how much fun I had, and what I thought we could do to lift SCCoLPA back up. I also told her at that conference that I wanted to host an annual conference. We hosted the best conference ever in May 2013. I served as conference chair. I have not missed a conference since I attended my first one in May 2010." When asked what keeps him coming back to conferences, Rod replied, "Spending time with the friends I have made through SCCoLPA and LPI. I enjoy the networking and being a part of a team. I feel very fortunate to have served LPI in various capacities since 2010."

When asked why he continues to be a member of LPI, Rod states, "I continue to be a member because I signed up for the ten-year Executive Board commitment. Serving on the EC is important to me because I felt LPI was going down a path that wouldn't be successful. I believe in LPI and its mission. I want to do everything I can to help make sure that this corporation is around for the next generation. I think we're taking the correct steps to get us back on the right track, and I'm proud to be a part of it."

**Stronger
Together**

Speaker Spotlight

Adele España-Purpur and Lisa M. Kennison

INSIDE LIFE IN THE FEDERAL COURT: A Judicial Assistant and Courtroom Deputy's View

SLSA was delighted to welcome Adele España-Purpur, Judicial Assistant to the Hon. Morrison C. England, and Lisa M. Kennison, Relief Courtroom Deputy, both from the U.S. District Court, Eastern District of California, as our guest speakers at the April 2022 membership meeting.



Adele España-Purpur



Lisa M. Kennison

Adele and Lisa shared a few humorous stories of their experiences working as a judicial assistant and a relief courtroom deputy. The one that stood out was both of their descriptions of the first time they had to bring the courtroom to standing and then announce the Judge.

Adele manages the Judge's court schedule, prepares and conducts reviews of orders and other documents issued by the Judge, and provides coverage for other judicial assistants when needed. When asked what she would recommend when contacting the court with questions, she emphasized the importance of checking the court's website, the Eastern District's Local Rules, Federal Rules, and the Judge's standing orders.

These resources can usually provide the answers you need and eliminate calls to the court. Lisa agreed that most of the calls and emails they receive could be eliminated if these resources were used more often.

Only in those instances when the answers or information you need are not covered on the website, Eastern District Local Rules, Federal Rules, or in any of the standing orders should you contact the judicial assistant or courtroom deputy.

Lisa described the challenges of working as a relief courtroom deputy, stating that her job keeps her on her toes since she has to know the ins and outs of every Judge's courtroom. While this has provided her a great education and working knowledge of each courtroom, she stated that she does look forward to the day when she receives a permanent courtroom assignment.

Although Lisa and Adele were happy to answer our questions, they learned a few things from us, too. For example, they wondered why we call and ask about reserving hearing dates. They were not aware that most superior courts have this requirement, and that's what we are used to doing. It was an insightful two-way educational conversation.

SLSA is very grateful to Adele and Lisa for sharing their time with us and we welcome them to join us again any time!

April 21, 2022 Membership Meeting and Installation of Officers



Outgoing President
Marci Frazier



LPI Treasurer Bettina Jacobson & LPI
Parliamentarian Jennifer Page, CCLS



Zoom Attendees!



LPI Vice President Rod Cardinale, Jr., and LPI President/SLSA
Incoming President Lynne Prescott, CCLS



Executive Advisor Brenda Johnson, CCLS,
Parliamentarian Dawn Willis, and Reservations Chair
Christie Kaelber



Newly Installed Officers for 2022-2023: Lynne Prescott, CCLS;
Crystal Rivera; Sarah Martinez; Christie Kaelber; and Corene Rodder



Adele España-Purpur, Jane Klingelhoets (USDC,
Eastern District of California), and Friends

Vendor of the Month

Huseby Global Litigation

Our April Vendor of the Month was Robin Barca, Regional Account Manager at Huseby Global Litigation. Since 1928, the Huseby family has been court reporting services. Huseby's mission is to provide you "excellence in every interaction." Huseby reporters are the most experienced, technology-savvy certified reporters and some have been with Huseby for decades. They know the needs of Huseby's clients and often anticipate those needs. The result: a smooth and seamless deposition experience, from scheduling to timely delivery of your transcript.

Remote Depositions: Introducing the all new HusebyConnect 2.0! Their newly redesigned remote deposition platform. Along with a new and improved user experience, here are a few things you can expect: redesigned client portal; easily upload and manage exhibits pre-deposition; robust live exhibit presentation tools; video & audio zoom integration; screen sharing tools.

Huseby's expert schedulers are ready to assist you with any location needs that you have around the country. If your deposition is remote, their team will ensure that they secure a court reporter with the proper notary certifications in the state that the deponent is located in.

Need Transcription? You have an audio file (court proceedings, hearings, interviews, meetings, arbitrations, telephone calls, etc.) you need transcribed? Huseby can transcribe it. They guarantee that all work is done by highly skilled reporters and transcriptionists. They can get it back to you as quickly as you need it.



Robin Barca and Marci Frazier

Trial Services: Huseby provides full-service support throughout the lifecycle of your trial with consultants that bring years of courtroom experience to your team. From the war room to the courtroom, with Huseby's assistance, your team can focus on strategy rather than how to present and display exhibits and video in court.

Thank you, Robin, for being a Vendor Partner.



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LPI

*Educating California's
Legal Support Professionals*

NextGen → Legal

TRIAL PREPARATION

Online Class Commencing June 21

NextGen Legal and LPI are offering this eight-week, online trial preparation class. You will be able to work at your own pace.

Cost

\$350 LPI members
\$400 non-LPI members

Cost includes a Trial Preparation Reference Guide

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

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

SOME OF THE TOPICS THAT WILL BE COVERED:

- Pretrial Procedures
- Trial Subpoenas
- Expert Discovery
- Non-Expert Discovery
- Organizing Trial material and Files
- Computers and Technology
- Calendaring Deadlines
- Issue Outline
- Trial Notebook
- Witness List and
- Witness Binders
- Impeachment Evidence
- Trial Exhibits and Exhibit Binders
- Trial Brief
- Voir Dire
- Motions in Limine
- Verdict Forms
- Jury Instructions
- Jury Selection
- Opening Statement
- Closing Statement
- Bench Trials

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LPI

*Educating California's
Legal Support Professionals*

NextGen → Legal

ADVANCED DISCOVERY

Online Class Commencing June 21

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

Cost

\$200 LPI members
\$250 non-LPI members

Cost includes an Advanced Discovery Reference Guide.

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

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

SOME OF THE TOPICS THAT WILL BE COVERED:

- Drafting Interrogatories (Form, Contention and Special Interrogatories)
- Drafting Demand for Production of Documents
- Drafting Requests for Admissions
- Drafting Deposition Notices
- Drafting Demand for Physical Examinations
- Drafting Deposition Subpoenas
- Drafting Subpoenas for Production of Documents
- Motions to Quash
- Answering Interrogatories
- Answering Demand for Production of Documents
- Answering Requests for Admissions
- Objections to Discovery Requests
- Meet and Confer Letters
- Motions to Compel Further Responses

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Governor's Report

By Corene Rodder, SLSA Governor

Thank you to our delegates Marci Frazier, Jan Ainsworth, and Chasity Barlow. We had great representation at the LPI 88th Annual Conference held in Santa Clara on May 19-22, 2022. LPI had over 150 attendees. It was wonderful to see everyone and be able to catch up in person. Santa Clara County Legal Professionals Association put on a great conference with lots of opportunities to win prizes, a silent auction, and vendors galore. Their theme was all about Italy and history. Friday night everyone was in Roman garb, the Executive Committee was in period dress during the general session on Saturday, and banquet was a Sicily-themed event.

The Mayor of Santa Clara, the Honorable Lisa M. Gillmor, gave a wonderful welcome message. I did not know that the city's theme is "The Center of All Things Possible." She welcomed all of us to Santa Clara and talked about what the area looked like before Great America and Levi Stadium.

The speaker at Saturday's banquet was Judge LaDoris Hazzard Cordell. She spoke about her book *Her Honor-My Life on the Bench . . . What Works, What's Broken, and How to Change It*. I enjoyed her presentation and am currently reading her book. What an amazing journey.

One of the highlights of the LPI Annual Conference was the Legacy Room. Please like and follow LPI on Facebook. Scroll down the posts to May 20 and you will see a live recording of the ribbon-cutting ceremony with Heather Edwards, CCLS, and Lynne Prescott, CCLS. Keep watching and you can see some of the wonderful artifacts gathered for the Legacy Museum.

I am so impressed at the amount of history they were able to gather and all of the history books that were donated or loaned for display.

Awards! Sacramento won a bunch! We won one of the two waivers for taking the CCLS exam, third place in our class for our bulletins, and second place in our Chapter Achievement (CAPSs) group with 36,900 points. Our very own Brenda Johnson, CCLS, won the Leadership Team Award, along with the CCLS Certifying Board. LPI presented its very first Legacy Award to Mary S. Rocca, CCLS, of Alameda County LSA, in recognition of her lifetime achievements of making a lasting, indelible imprint upon the organization and the legal profession, and exemplifying the principles of paying it forward and giving back.

I am also excited to report that LPI has now installed its first ever male president, Rod Cardinale, Jr. The rest of the incoming officers/appointees of the Executive Committee are:

Vice President – Donna Day
Executive Secretary – Bettina Jacobson
Treasurer – Rita Burnett, CCLS
Parliamentarian - Elise Dresser, CCLS
Executive Advisor – Lynne Prescott, CCLS

Rod's theme is "Stronger Together."

Keep sending in any CAPs points so we can have a big win next year! We get points for any classes you take or teach, meetings you attend, and more! They are easy to report. Just fill out the CAPs form on the SLSA website at: <https://www.slsa.org/chapter-achievement-points-caps-online-submission-form/>



LPI's 88th Annual Conference of Delegates and Board of Governors Meeting - Santa Clara, CA



Delegates Marci Frazier, Jan Ainsworth, and Chasity Barlow



Legacy Project Pop-Up Museum Exhibit



Chasity Barlow, Corene Rodder, Dawn Forgeur, CCLS, and Donna Day Enjoying the Welcome Reception



Legacy Project Pop-Up Museum Guest Book Signing



LPI's 88th Annual Conference of Delegates and Board of Governors Meeting - Santa Clara, CA



Lynne Prescott, CCLS, Bettina Jacobson, Jennifer Page, CCLS, Heather Edwards, CCLS, and Donna Day at the Grand Opening of The Legacy Project Pop-Up Museum



Chasity Barlow Checking Out the Opportunity Drawing Prizes



Brenda Johnson, CCLS



Linda Brown, CCLS, Competing in the Legacy Project Type-Off Contest (on a REAL typewriter!)



Lynne Prescott, CCLS, Dressed in Vintage Attire in Honor of the Legacy Project Pop-Up Museum





LPI's 88th Annual Conference of Delegates and Board of Governors Meeting - Santa Clara, CA



LPI's New President - Rod Cardinale, Jr.



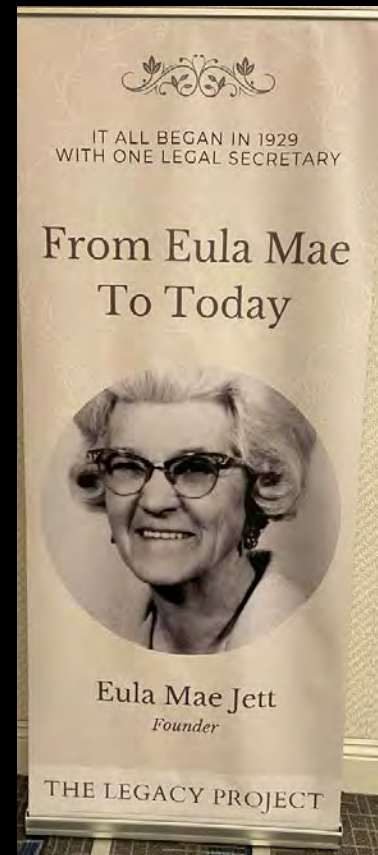
The Honorable LaDoris Hazzard Cordell (Ret.)
Conference Guest Speaker



Crystal Rivera and Corene Rodder
Looking Good, Ladies!



Legacy Project Pop-Up Museum Exhibit



LPI Officers and Chairpersons 2022-2023



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skennedy@uslegalsupport.com



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

Here's what we provide:

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- Remote, in-person, or hybrid proceedings
- Complete virtual deposition solution including digital exhibit storage and sharing
- SOC 2 Type 2 and HIPAA compliant Client Portal

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

INTERPRETING & TRANSLATIONS



- Network of **5,000+** certified and qualified interpreters with minimum of 5 years' legal experience
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Delegates Reports

Delegates to LPI's Annual Conference are required to submit a written report to the membership.

Marci Frazier



88th Annual LPI Conference – Stronger Together

I had the estimable honor of representing Sacramento Legal Secretaries Association as a delegate at LPI's Annual Conference in Santa Clara, California, on May 20 through May 22, 2022. The Theme was "A Weekend in Italy."

Italy as a Theme

The Italian theme was featured throughout the weekend's activities.

Those who arrived on Thursday night were treated to a special reception hosted by First Legal, LPI's joint venture partner. First Legal hosted a "Pizza Party in Naples". The Saturday Banquet had as its theme, "Evening in Sicily," where many dressed in their best Godfather attire. Sunday featured "Brunch in Genoa," where everyone said 'Arrivederci' to each other at the conclusion of the conference.

LPI Executive Committee

The Saturday General Session was highlighted by the introduction of the LPI Executive Committee (EC) members: President Lynne Prescott, CCLS, Vice President Rod Cardinale, Jr., Executive Secretary Donna Day, Treasurer Bettina Jacobson, Parliamentarian Jennifer L. Page, CCLS, and Executive Advisor Heather Edwards CCLS. The introduction of each EC member included a rousing and comical biography of a variety of historical informational tidbits about each member, from the member's very first office equipment (which, for each member, included a Selectric typewriter – either the fabled brown or illustrious green color) to their favorite car and their dream vacation.

SLSA Winnings

SLSA won 2nd place for the LPI Chapter Achievement Contest (CAPS) and 3rd Place for the LPI Bulletin Contest. SLSA was also honored with winning one of the CCLS exam waivers, which can be used for the September 2022 or the March 2023 exam. Go SLSA!

Honored Speakers

There were two very distinguished guest speakers at Annual Conference this year. At Saturday morning's General Session, we were privileged to hear from the Mayor of the City of Santa Clara, The Honorable Lisa M. Gillmor. We heard many fascinating aspects of Santa Clara's appeal,

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Delegates Reports

(Continued from Page 24)

including the location of many tech companies headquartered there, the Intel Museum which features exhibits about technological milestones and the relocation of San Francisco's NFL team, the 49ers, who now play at the newly installed Levi's Stadium.

The second distinguished guest speaker was The Honorable LaDoris Hazzard Cordell at Saturday evening's banquet. Retired Judge Cordell spoke eloquently on her legal career on and off the bench, including being the first African American woman to sit on the Superior Court of Northern California. She spoke of her journey through the halls of the court system and showed a timeline of that history through pictures of her amazing hairstyles throughout the years. The strongest highlight of the discourse was the announcement of her autobiography, "Her Honor – My Life on the Bench . . . What Works, What's Broken, and How to Change It," which won the Golden Poppy Awards 2021 for Non-Fiction and is a 2022 Finalist for the California Book Awards.

Annual Conference's Uniqueness

This year's annual conference was unique on many levels. First, it commemorated LSI/LPI's 88th year as a corporation. Eighty-eight years! Profound indeed.

Secondly, it was the inauguration of The Legacy Project. Lynne Prescott, CCLS, President of LPI from 2020-22, first announced the formation of the special LPI Legacy Project in February 2021. Her vision for the project was to chronicle, curate, archive and preserve LSI/LPI history, memorabilia and artifacts. The Legacy Room was reserved and opened during Annual Conference, allowing attendees to see, feel and touch LSI/LPI history. What a beautiful testament to the history of our great corporation.

Thirdly, it was the installation of Rod Cardinale, Jr., as President of LPI. Rod is the first male installed as president of Legal Professionals, Inc. The theme of Rod's presidency is "Stronger Together." Rod's presidency will focus on Education, Education, Education. LPI University will highlight multi-week online courses and NextGen webinars; Legal Technology Training will focus on webinars centered on tools of our trade such as Microsoft Office Suite, Adobe Acrobat, Best Authority, etc.; and LPI Continuing Education will highlight unique programs such as the Summer Court Series, On-Demand Webinars, the CCLS Online Study Group, and more. We look forward to President Rod's exciting term.

It was truly an honor to be in attendance and to represent Sacramento Legal Secretaries Association at this historic event in LPI's history.

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Delegates Reports

(Continued from Page 25)

Chasity Barlow



The “A Weekend in Italy” themed 88th Annual LPI Conference was held over the weekend of May 19-22, 2022, and I attended as Delegate on behalf of the Sacramento Legal Secretary Association (SLSA). Being new to the Association, I did not know what to expect at Conference. I am grateful for being elected to represent SLSA and for the opportunity to get to know more about LPI, meet other likeminded professionals from across the state, and participate in the workshops and social events.

I arrived Thursday evening to be on-site for early Friday activities. This also allowed me to participate in the First Legal Kick-off Party, which was my first look at the exhibitor room and opportunity to meet the vendors of the weekend. I made connections with vendors that I will hopefully utilize in a large discovery project my office is preparing for. The Kick-off Party was also my first chance to meet LPI members from other Associations. Everyone was excited to show me around and introduce me when they learned it was my first conference, including advising me on the opportunity drawing tickets. Sadly, I did not win any of the drawings, but it was so much fun to see the assembled baskets and prizes that were part of the drawing, and guess which prizes were the most coveted.

On Friday, I participated in the Newcomers’ Luncheon and picked up more introductions and knowledge about the organization and what to expect for the weekend. After being nervous as a brand-new member attending Conference as a Delegate, this Luncheon helped me feel more prepared for the weekend. There was discussion about the structure of the upcoming Assembly Sessions, explanation of the acronyms that would be commonly used, and some catching up on information about LPI as a whole. After lunch, I was able to attend two technology workshops on different aspects of using Microsoft Word with June Hunter, as well as a Legal Specialization Seminar Civil Litigation workshop entitled “Dissecting a Real Trial.” I gleaned useful information in each of the three workshops I attended on Friday! The reception Friday evening was a chance to mingle and meet more attendees who had arrived. The entertainment for the evening was a band comprised of middle and high school students from an area music school, “The School of Rock,” and the performers were very talented. A variety of music from the Beatles to Michael Jackson and the Red Hot Chili Peppers provided a great atmosphere for getting to know everyone.

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Delegates Reports

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Saturday morning, I acted in my official role as Delegate for the first time, registering for and attending the first Assembly Session to vote on organization business. My fellow delegates were supportive and filled me in on anything I was unfamiliar with. Throughout the Assembly Sessions, I learned about the LPI officers and the types of business they are connected to, along with the different committees. I gained an appreciation for the work required to plan and execute Conference and learned that Sacramento is going to be collaborating with Placer to host a conference in November! I also was fortunate to be present for the impassioned discussion regarding the announced plan to change the name of the California Certified Legal Secretary exam and Board to California Certified Legal Specialist. Though an emotional and potentially difficult topic, it was a spotlight on how proud members of LPI are of their careers and accomplishments.

Saturday night's banquet mixed the fun of dressing up for the first time in more than two years with the chance to hear a fantastic speaker, the Honorable LaDoris Cordell, whose book "Her Honor" is already on its way to me! Even though I did not know the stories or histories of the LPI officers, being present for the installation of the next term's officers felt important. This includes the induction of LPI's first ever male President, Rod Cardinale, Jr. I was witness to the incredible outpouring of love and appreciation for Lynne Prescott, CCLS, for her work and tenure as LPI President from 2020-2022, and was proud to know I'll get to work with Lynne in her role within the SLSA. During the banquet there was recognition of the 18 newly certified CCLSs who had passed the exam within the past several months. This was especially moving since COVID prevented the exam for more than two years and these 18 represent a new era of online testing made possible by the hard work of the CCLS Certifying Board. Good luck to our very own Brenda Johnson, CCLS, in her new role as Chair of the CCLS Certifying Board.

Finishing up the weekend with Sunday brunch and the final Assembly Session got me excited to return to Sacramento and become more involved with the SLSA. As a new member, I had only been to one meeting before the Annual Conference, and I was unsure about the level of involvement I would have in the Association. After the experience of meeting everyone, participating in voting, feeling the extraordinary respect and support between members, and being included in the discussion about plans for the upcoming November conference during lunch on Saturday, I ended the weekend feeling part of something. Even though I had not been a member long enough to contribute to the successes of SLSA, I was still proud to applaud our placement in the Bulletin Contest and the Chapter Achievement Contest, as well as the receiving of an exam fee waiver for the upcoming CCLS exam. I enjoyed everything about my adventure as Delegate for SLSA in my first conference and look forward to being a part of many future events.

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Delegates Reports

(Continued from Page 27)

Jan Ainsworth



First and foremost, I thank you for electing me as one of your delegates to LPI's 88th Annual Conference, May 19-22, 2022, at the Santa Clara Marriott.

The Mayor of Santa Clara, The Hon. Lisa Gillmor, welcomed us to the city. Reports from all officers were given, as well as awards for the Bulletin Contest (we placed third), LPI Scholarships (4), and Membership Gain Contest. The LOPM softbound releases May 31.

Santa Clara County LPA transported us to a Weekend in Italy on the final leg on the S.S. LPI Transatlantic Cruise where 120 people were in attendance.

There was a CCLS luncheon honoring 18 new California Certified Legal Secretaries. The next exam is September 17. Legal Professional Training will be instituting a "class pass" for group rate learning. The Webinar Committee will be instituting a Summer Court Series, so stay tuned. The CCLS Certifying Board awarded its fee waivers to Stanislaus County LPA and our very own SLSA. Most interesting, was the announcement of the name change from California Certified Legal Secretary TO California Certified Legal Specialist.

I arrived on Thursday in time for the inaugural conference kick off reception hosted by First Legal with a stop in Rome. I had a chance to visit with the vendor(s), register to attend conference, while enjoying conversation and good food. I arose early on Friday to attend the unveiling of the long-awaited Legacy Project Room spearheaded by LPI Curator Heather Edwards. There was a nice turnout at the ribbon cutting with various local associations represented in scrapbooks, clothing, jewelry, and various office equipment from LPI's inception to date.

Saturday evening's banquet had a Godfather-type theme and we spent the evening in Sicily. Our emcee for the evening was The Hon. Judge LaDoris Cordell (Ret.). The Chapter Achievement Awards were presented along with all the President's Awards.

The LSS hosted several workshops on Friday, May 20. That evening we enjoyed a welcome reception pizza party in Naples. There were games and we were entertained by The School of Rock. They are a gifted group of teenagers.

Sunday morning at brunch in Genoa we hailed the installation of officers and our history making very first male president. His theme is Stronger Together. The new LPI officers for 2022-2023 are: Rod Cardinale, Jr., President, Santa Clara County LPA; Vice President, Donna Day, Alameda County LSA; Executive Secretary, Bettina Jacobson, Placer County LPA, and Treasurer, Rita Burnett, CCLS, of Los Angeles LSA.

On Saturday morning, I attended the General Assembly of Delegates complete with opening ceremonies. Adoption of the 2022 Annual Conference Standing Rules, Election Rules, and Official Program was approved by the delegates as distributed.

Once again thank you again for electing me to be a delegate. It was my pleasure.

CCLS Online Study Group



CCLS ONLINE STUDY GROUP

June 29, 2022 – August 31, 2022

If you are interested in studying for the California Certified Legal Secretary ("CCLS") Exam,** join LPI's CCLS Online Study Group. During the Study Group, all topics covered in the CCLS exam will be reviewed (Please see the CCLS Information Kit on LPI's website for a description of the sections covered on the exam).

Lectures (MP4) and materials will be posted by no later than 7 p.m. on Sundays. Students may complete the material at their convenience. Access information will be provided upon enrollment in the class.

Individual modules are available for purchase for each section covered.

If you only need to study for certain sections, you may purchase individual modules at any time during the then-current Study Group class. You may also purchase all sections if you prefer to study on your own.

Reminder – all material is intended for individual use only, and not for local association study groups

Students will be provided with homework and handouts. Students now have the option to include the **Law Office Procedures Manual in their registration (see below for pricing)**. The other reading materials (available on Amazon.com) are required by NO LATER THAN the start of class: **The California Style Manual (4th Ed.)**, **The Redbook by Bryan A. Garner**, and **Pocket Guide to Legal Ethics**. Students are also encouraged to have the CCLS Study Guide.

For full information, please go to LPI's website here:

[Events Calendar - Legal Professionals, Inc. - LPI : Legal Professionals, Inc. – LPI \(legalprofessionalsinc.org\)](#)

**All examinees must meet eligibility guidelines outlined in the CCLS Information Kit on LPI's website.

REGISTRATION FEES:

10-Week Study Group (without the Law Office Procedures Manual):

First time participation: \$100 Members \$150 Non-Member
Subsequent participation: \$ 50 Members \$ 75 Non-Members

10-Week Study Group (including the Law Office Procedures Manual):

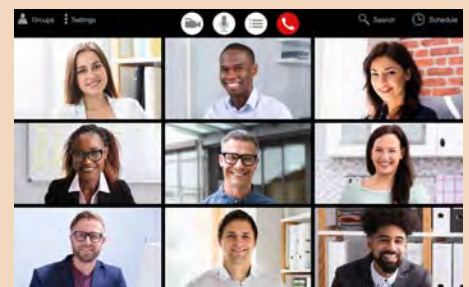
First time participation: \$190 Members \$240 Non-Member

Individual Modules: (\$15 each Members; \$25 each Non-Members)

California Legal Procedure	Legal Terminology	Legal Computations
Skills	Reasoning & Ethics	
Law Office Administration	Ability to Communicate Effectively	

DEADLINE TO REGISTER IS JUNE 28, 2022. NO REFUNDS AFTER JULY 19, 2022.

If you have any questions, please contact Vivian Shreve, CCLS, cclschair@legalprofessionalsinc.org.



A Great Way to Prepare for the CCLS Exam!

CCLS Quiz: Reasoning and Ethics

Are You on Solid Ground? Yes or No.

___ 1. A potential client calls in to your office, describes their situation, and states that they want to initiate a civil lawsuit. They also state that they don't really want to schedule a consultation with an attorney, they just need to know what paperwork needs to be filed with the court. You know which paperwork they need to file and proceed to tell them. Are you on solid ground?

___ 2. You and a colleague enter the restroom at the same time and begin discussing a case that you have been working on together. Are you on solid ground?

___ 3. You run into a friend's mother at the grocery store and during the conversation you mention that her son was in the office recently. The mother appears surprised by this news and says she'll have to ask her son about it. Are you on solid ground?

___ 4. A new case has come into the office and you notice that a conflict check was not completed at the intake stage. You take the initiative to run a conflict check and discover that one of the parties on the other side of this case has previously been represented by your firm. There is no conflict waiver in the case opening paperwork. You think this is odd, but assume someone must have realized this or the case wouldn't have been accepted and opened. Are you on solid ground?



Scott Herman
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LPI Code of Ethics



It shall be the duty of each member of Legal Professionals, Incorporated, to

observe all laws, rules and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence and diplomacy, in accordance with the highest standards of professional conduct.

*Dedicated in memory of Joan M. Moore, PLS,
CCLS, LSI President 1980-1982*



Parliamentarian's Piece

By Dawn Willis, SLSA Parliamentarian

Motions (Continued from Previous Issue)

Terms!!! Terms!!! Terms!!!

When a member requires more time to consider the question, the motion may be Postponed Definitely to a definite time and/or day. "Madam Chairperson, I move to postpone the question until . . ."

If you think the discussion has gone on for too long and you want to stop the discussion and the vote. "Madam President, I move the previous question."

When a discussion is getting long, but you want to give a reasonable length of time for consideration of the question you may Limit Debate. "Madam President, I move to limit discussion to two minutes per speaker."

The opposite of postpone definitely, is to Postpone Indefinitely. "Madam Chairperson, I move to postpone the question indefinitely."

Recess is when you've had enough and want to take a break for a while. "Madam Chairperson, I move to recess for ten minutes."

Adjournment is wanting to end a meeting. "Madam Chairperson, I move to adjourn."

Permission to Withdraw a Motion is used when you are sorry you made the motion in the first place. "Madam President, I ask permission to withdraw my motion."

If your chairperson is not following the agenda, you may Call for Orders of the Day to get back on track.

Need to formally move the agenda items around? Suspending the Rules is used when it becomes obvious that an item you are interested in will not come up before adjournment and you desperately want it to get heard. "Madam Chairman, I move to suspend the rules and move item 5 to position 2."

A lot of noise outside the meeting? Point of Personal Privilege may be used to bring it to the attention of the assembly. Without recognition, you may blurt out, "Point of personal privilege." Chairman: "State your point." Member: "There is too much noise, I can't hear."

If your meeting is not following proper rules, calling out "Point of Order" will bring recognition that the meeting needs to get back on track.

Wondering about some of the facts under discussion, such as the balance in the treasury when expenditures are being discussed, without recognition, you may call out "Point of Information."

If all of these parliamentary rules are confusing you, without being recognized, you may call out "Point of Parliamentary Inquiry" to bring Robert's Rules back in line with the meeting and get clarification on a rule.

Legal Procedures

U.S.D.C., Eastern District of California

Local Rules Change

By Rebecca M. Lerma, Paralegal, Stoel Rives, LLP



This article originally appeared in The Podium, LPI's Blog, and is reprinted with permission.

I attended a presentation by the Federal Bar Association where the Magistrate Judges presented on local rule changes which went into effect in March 2022. Here are a few highlights. The full redlined version of local rule changes can be found at:

[https://www.caed.uscourts.gov/caednew/assets/File/GO%20645\(1\).pdf](https://www.caed.uscourts.gov/caednew/assets/File/GO%20645(1).pdf)

Local Rule 135 – Consent is no longer required for service of electronic documents. Attorneys may no longer opt out. Your registration as a filing user constitutes your consent. The only persons who will still get paper service are pro se parties and prisoners.

Local Rule 173 – There is an existing ban on broadcasting proceedings. However, the court is currently in an audio streaming pilot program where live-streaming proceedings might occur in your cases as part of the pilot program.

Local Rule 174 – Appearance by video conference or by telephone may be requested. (Note: Check your judge's standing orders as most will post their appearance preferences. Magistrate Judge Cota prefers personal appearance; Magistrate Judge Clair will give in-person argument time to any attorneys with 1-5 years who need court experience).

Local Rule 230 – Motion hearing dates changed from 28 days to 35 days' notice. They are no longer calculating opposition and reply dates based on the hearing date. It is now calculated based on your filing date. Oppositions are due 14 days from the date motion is filed. Replies are due 10 days after the opposition is filed. [Magistrate judges generally noted this is to even the playing field and make it consistent so motions that are continued do not get their briefing continued. They prefer to have it fully briefed and then continuances are dealing with the hearing date change move only.]

After a reply is filed, no additional memoranda, papers, or other materials may be filed without prior Court approval except:

(1) Objection to Reply Evidence. If new evidence has been submitted with the reply brief, the opposing party may file and serve, no later than seven (7) days after the reply is filed, an Objection to Reply Evidence stating its objections to the new evidence. The Objection to Reply Evidence may not include further argument on the motion. *(Continued on page 33)*

Legal Procedures

(Continued from Page 32)

(2) Notice of Supplemental Authority. Either party may file a notice of supplemental authority to bring the Court's attention to a relevant judicial opinion issued after the date that party's opposition or reply was filed. The notice of supplemental authority may contain a citation to the new authority but may not contain additional argument on the motion.



NEW Local Rule 233 – Motions for Administrative Relief

Housekeeping motions such as motions to exceed applicable page limitations; requests to shorten time on a motion; requests to extend a response deadline; requests to alter a briefing schedule; or requests to alter a discovery schedule that do not affect dispositive motion filing dates, trial dates, or the final pre-trial conference must be labeled and filed as a Motion for Administrative Relief. They must not exceed 5 pages excluding declarations and exhibits and must include a proposed order. Oppositions may be filed within 5 days. These administrative motions are submitted without hearing.

Local Rule 251 – Joint Statements must be filed at least 14 days before the hearing date (it was previously 7 days). Motions for Protective Orders now act as a stay of that discovery pending resolution of the motion.

Appendix A – Pilot program to case assignments. Magistrate judges will start to be assigned to cases as a direct assignment. They are going to start with 20-30% and adjust as needed. You will have 90 days to consent or request reassignment to the District Judge. The magistrate judges do not see declinations so you should not worry about what they will think. They only see consent if all parties consent. They are hopeful this program will help reduce the workload for District Court Judges and will result in faster resolutions.

What's my name?!? Pet peeve for the magistrate judges. Do not call them Magistrate [name], call them Magistrate Judge [name].

Upcoming LPI Conferences

First Quarterly Conference
August 12-14, 2022
Doubletree Anaheim/Orange - Orange, CA
Co-Hosted by LPI and Orange County LPA



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



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



Answers to CCLS Quiz

1. No. Providing this type of information constitutes dispensing legal advice and the unauthorized practice of law.
2. No. A restroom is typically a public use facility and is not a secure environment for conducting discussions that involve clients, cases, or information that would be considered confidential in nature.
3. No. This is a breach of confidentiality. Even if it is the client's mother! You should never discuss or disclose who your clients are or who comes into the office unless you have been given express permission from the attorney.
4. No. Never assume, always check. Conflict checks are mandated by the State Bar of California and failure to conduct a conflict check can result in dire consequences for your office and your clients.

SAVE THE DATE!

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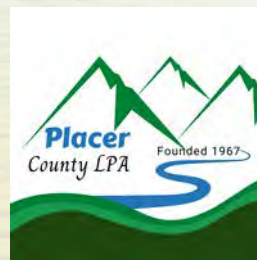
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Law Office Products & Management

The Technological Competency Requirement

By Lynne Prescott, CCLS

It's no secret that technological competency for attorneys came under scrutiny during the pandemic. During that time and since, most attorneys have had to learn to deal with more technology than they were used to. And at the rate that technology evolves, it's no wonder most industries can't keep up. The legal industry is certainly no exception and, let's face it, not especially known for its quick adoption of anything. Although COVID-19 forced the courts and lawyers to quickly embrace technological solutions to continue operating, serve clients and the public, technological competency for lawyers has always been a requirement.

Does that mean that a lawyer must be an expert in all things computer-based to stay in business? Admittedly, there's a lot of fear when it comes to the adoption and use of technology. While there is an ethical duty of technological competency that exists, there's no need to be a tech expert.



According to Zavieh Law's article, "Technological Competency for Lawyers," here are some suggestions:

1. Hire someone to help you. Although you are still required to have some understanding of the technology used, hiring (and properly supervising) an assistant can make learning the software and using the software easier.
2. If you already have an assistant and you're currently looking for the right legal technology for your legal practice, ask your assistant for their input. This is especially important if they will be the primary person using the software. Knowing the features that they need can make the selection process easier. Your assistant may be able to help you better understand how the technology works (even if you aren't the person who will use it regularly).
3. Start small with tech changes. While it is your ethical obligation to be technologically competent, you do not have to introduce major technology changes to your practice overnight.
4. Ask your colleagues about which CMS (case management software) they like and why. Go to the website of each and look at the features.
5. Consider which billing provider may truly meet your needs. Talk to them to determine if they can help you make the switch or if they'll just leave you on your own. It's important to know if you'll have support. Ultimately, your law firm is your responsibility. It's important to ask questions and get answers before you make decisions.

Employment Report

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



Litigation Legal Secretary

We currently have an opening in our Sacramento Office for a Litigation Legal Secretary with strong litigation and transactional experience. Qualified candidates are team players with excellent communication and interpersonal skills. They are able to work with a variety of people including working with several attorneys simultaneously. Must be highly organized, detail-oriented, positive, proactive, and professional. All candidates must have exceptional writing, proofreading, technical and administrative skills. As well, must be proficient in MS Word and Outlook, and type 75+ wpm.

Responsibilities

Provide day-to-day secretarial support for assigned attorneys or other legal employees. Draft standard correspondence, memoranda, and other documents. Establish and maintain calendar and deadline reminder system; utilize master calendar system. Set up client files following firm conflict check system. Maintain client files according to established procedures. Schedule appointments and make travel arrangements for legal employees as needed. Facilitate preparation, set up, and clean up for attorney/client meetings, workshops, consortiums and office meetings. Other duties as assigned.

To learn more: lozanosmith.com/careers. Please send a cover letter and resume to sjobs@lozanosmith.com.

Legal Secretary/Administrative Assistant

Three-partner law firm serving primarily American Indian Tribes and organizations seeks a legal secretary/administrative assistant with at least three (3) years of litigation and administrative experience for virtual law office. Working 4-5 days a week, a minimum of 25 hours a week (more as workload demands), you will be providing a wide range of support activities in the areas of civil litigation and transactional matters, as well as administrative functions. Job is approximately 35% litigation/65% transactional and administrative work. This is a remote work position.

For more information on this opportunity, go to: <https://www.legalprofessionalsinc.org/career-opportunities-northern-ca/>

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Crystal Rivera

Audit & Budget Committee

Crystal Rivera

Marci Frazier

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Vacant

Bulletin Editor

Lynne Prescott, CCLS

California Certified Legal Secretary (CCLS)

Brenda Johnson, CCLS

Charitable Projects

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Employment

Brenda Johnson, CCLS

Historian

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Law Office Products & Management

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Legal Procedures

Vacant

Legal Professional of the Year/Boss of the Year

Vacant

Legal Secretarial Training

Brenda Johnson, CCLS & Lynne Prescott, CCLS

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Crystal Rivera

Nominations & Elections

Marci Frazier

Professional Liaison

Dawn Willis

Programs

Marci Frazier

Reservations & Reception

Marci Frazier

Scholarship

Vacant

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Website Coordinator/Social Media

Lynne Prescott, CCLS

Fairytale Town

Vacant

November 2022 Conference Committee

Crystal Rivera

Corene Rodder

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

Membership Application

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

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

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

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

NAME OF APPLICANT _____ ARE YOU A CCLS? YES NO

EMPLOYER _____ POSITION _____

BUSINESS ADDRESS _____ CITY/ZIP _____

BUSINESS PHONE _____ BUSINESS E-MAIL _____

RESIDENCE ADDRESS _____ CITY/ZIP _____

RESIDENCE PHONE _____ RESIDENCE E-MAIL _____

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

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

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

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

SIGNATURE OF APPLICANT _____ DATE _____

SPONSOR (IF ANY) _____ APPLICATION APPROVED _____

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

SLSA ACTIVE MEMBER* (Annual Dues \$50): Persons currently engaged in work of a legal nature with at least one year's experience as a legal professional, including persons licensed to practice law, persons working in the office of an attorney licensed to practice law in this state, or in the courts of this state, trust departments of banks or trust companies, or in any other institution or office directly engaged in work of a legal nature, including the public offices of the United States government, state, cities, counties or municipalities. *Dues include local dues, any initiation fee, and Legal Professionals, Incorporated (LPI) per capita tax.*

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

LPI and SLSA ASSOCIATE MEMBER (Annual Dues \$25):** Persons who are actively seeking employment in the legal profession. An Associate Member of LPI may maintain Associate Membership for a period of two years. Associate Members are considered an Active Member for purposes of LPI contests and have all the rights of an Active Member of LPI but are not eligible for elected or appointed office of LPI and may not serve as Governor or delegate of a Local Association. LPI associate members are not eligible for the LPI scholarship. *Dues include local dues, any initiation fee, and LPI per capita tax.*

* ACTIVE MEMBERSHIP IN SLSA INCLUDES MEMBERSHIP IN LEGAL PROFESSIONALS, INCORPORATED (LPI), AND ALL BENEFITS OF MEMBERSHIP IN LPI AND SLSA. ACTIVE MEMBERS MAY VOTE, SERVE ON COMMITTEES, AND BE ELECTED TO OFFICE.
** STUDENT/ASSOCIATE MEMBERS MAY NOT VOTE, AND MAY NOT BE ELECTED TO OFFICE. STUDENT/ASSOCIATE MEMBERS MAY SERVE ON COMMITTEES.
*** SLSA Membership Period: May 1 - April 30. The fee for Active Membership applications received after October 31 is pro-rated at \$30.00.

PAGE 1 OF 2 (Form adopted 03/01; revised 04/22)

Name: _____

Birthday (MO/DAY) _____ Talents, Interests, Hobbies: _____

YOUR SPECIALTY:

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

EDUCATION:

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

TYPE OF OFFICE:

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

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

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

- CHECK HERE IF YOUR EMPLOYER PAYS FOR YOUR MEMBERSHIP DUES
- CHECK HERE IF YOUR EMPLOYER PAYS FOR MONTHLY DINNER MEETINGS
- CHECK HERE IF YOU ARE WILLING TO HOLD A STANDING COMMITTEE CHAIR OR ASSISTANT CHAIR POSITION

E-MAIL PREFERENCE? BUSINESS RESIDENCE (Please check only one)
(This includes publications of *The Legal Eagle* and *The Legal Secretary*)

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

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

How did you hear about SLSA? _____

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

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

Renewal Form

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



Sacramento Legal Secretaries Association MEMBERSHIP RENEWAL APPLICATION

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

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

Make check payable to:

Sacramento Legal Secretaries Association

- SLSA and LPI Membership Due: \$50
 LPI and SLSA Student Membership Due: \$25
 LPI and SLSA Associate Membership Due: \$25

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

Return the completed application and full payment to:

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

MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

NAME: _____

ARE YOU A CCLS? _____

BIRTHDAY: _____

JOB TITLE: _____

EMPLOYER: _____

BUSINESS ADDRESS: _____

BUSINESS PHONE: _____

BUSINESS E-MAIL: _____

RESIDENCE ADDRESS: _____

RESIDENCE PHONE: _____

RESIDENCE E-MAIL: _____

YOUR SPECIALTY:

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

MAILING/LISTING INFORMATION:

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

Where do you want e-mail delivered? (check one) Business Residence

INVOLVEMENT:

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

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

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

SLSA USE ONLY	Date Received: _____	On Roster: _____
	Check no.: _____	On LPI: _____
	On Email List: _____	To Edition: _____

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Service of Process

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

Bank Levy and Earning Withholding Orders

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

California Secretary of State

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

Court Services

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

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

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

Other Services and Charges

Waiting time \$40.00 per hour	\$40.00
Fee / Check advance (10% unless reimbursed within 5 business days)	\$5.00
Notary	\$15.00
Copy charges	\$0.25
Credit card (Visa, Mastercard, Discover, AMEX) 3%	

A2Z Attorney Service
980 9th St., 16th Floor
Sacramento, CA 95814

916-436-5484

Serve@A2ZAttorneyService.com