



Sacramento Legal Secretaries Association

The Legal Eagle

Book 2013, Issue 5

May 2013

SLSA Past Presidents Welcome Dawn R. Forgeur, CCLS, Into Their Ranks



SLSA Past Presidents from left to right: Dawn R. Forgeur, CCLS; Astrid Watterson, CCLS; Dawn Willis; Jennifer Rotz; and Jan Ainsworth. See story on page 15.

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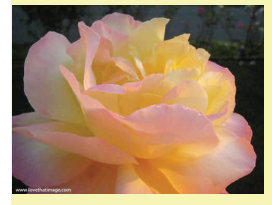


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May Meeting Information

Because LSI's Annual Conference conflicts with SLSA's regular dinner meeting date, and because so many of our officers and members will be in attendance, **there will be no regular SLSA dinner meeting for the month of May.** Our next regular dinner meeting will be held on June 20, 2013, at the Downtown Courtyard

President

Lynne Koroush
president@slsa.org

Bulletin Editor

Corene E. Rodder
rodderc@gtlaw.com

Greenberg Traurig, 1201 K Street, Suite 1100,
Sacramento, CA, 95814 — (916) 442-1111



NON MEMBERS ARE WELCOME!

We're on the Web!
www.slsa.org

President's Message: "From Seeds of Dreams, A Garden of Possibilities"



Lynne Koroush, President
SLSA 2013—2014

Almost 75 years ago, this Association started from the seeds of a dream - - a dream to provide opportunities for education and training for legal professionals. Those seeds have been nurtured with the conviction, passion, and unwavering commitment of hundreds of individuals since that time, and have produced a garden of possibilities that continues to multiply and regenerate, even today.

You can literally take your pick of varieties, annuals, perennials, and specialty items.

Looking for a good, solid starter? There's SLSA's Beginning Legal Secretary Course. How about a particular species? LSI's Legal Specialization Sections offer training specifically cultivated for Civil Litigation, Law Office Administration, Transactional Law, Criminal Law, Family Law, and Probate/Estate Planning. Need a good instructional guide? The *Legal Professional's Handbook* and *Law Office Procedures Manual* are great tools, no matter your skill level or expertise.

Maybe you would like to add splashes of color to your established foundation by selecting from SLSA's monthly dinner meeting educational programs, or grabbing

a little training at a Lunchtime Learning Lesson. And for those who seek the level of Master Gardener, the field of certification as a CCLS awaits.

I wish the first seed-planters of this Association could see the outstanding yield that has resulted from their careful tending and nurturing. As SLSA's 52nd President, I am very proud and honored to serve this Association and to continue planting the seeds of dreams that produce such an amazing garden of possibilities and opportunities for so many.

Working alongside me this year are the following Executive Board members: Dawn R. Forgeur, CCLS, Governor and Executive Advisor; Jennifer Estabrook, CCLS, Secretary; Maryanna Rickner, Treasurer; and, Astrid B. Watterson, CCLS, Parliamentarian. I am so pleased to be working with such a great group of professionals, and I am very grateful for their dedication and willingness to serve.

I would like to thank Mary S. Rocca, CCLS, LSI Past President 2004-2006, for joining us at the April 18 meeting and serving as SLSA's Installing Officer. It's always wonderful to see Mary and her husband, Lou, and she did a beautiful job on the installation ceremony. Also, thank you to Gene Livingston and Gregory Sperla for serving as Installing Marshals for the occasion.

"I wish the first seed-planters of this Association could see the outstanding yield that has resulted from their careful tending and nurturing."

Thank you to Greenberg Traurig for the tremendous show of support for me, personally, and for SLSA. At the installation meeting, Greenberg Traurig presented the Association with a beautiful, wheeled leather litigator's case to be used by the SLSA President and passed on to each successive President. The case has an engraved silver plate which reads, "Presented to Sacramento Legal Secretaries Association by Greenberg Traurig."

Thank you to SLSA's immediate Past President, Dawn R. Forgeur, CCLS, the previous Executive Board members, and the outgoing committee chairs for doing such a wonderful job the past two years. Thank you, also, to the incoming committee chairs for your enthusiasm and willingness to accept a chairmanship.

This President's Message would not be complete without expressing my appreciation for you, the members of SLSA. Thank you for your faith in me and electing me as your President.

--Lynne Koroush



SLSA's 74th Annual Installation of Officers



New SLSA officers: President, Lynne Koroush; Secretary, Jennifer Estabrook, CCLS; Treasurer, Maryanna Rickner; and Governor, Dawn Forgeur, CCLS



SLSA Governor, Dawn Forgeur, CCLS; Gene Livingston, Esq., of Greenberg Traurig, LLP and SLSA President, Lynne Koroush



SLSA President, Lynne Koroush and Mary S. Rocca, CCLS, LSI Past President 2004-2006



Jeff Leacox, Esq., Co-Managing Shareholder of Greenberg Traurig, LLP, Sacramento and SLSA President, Lynne Koroush



SLSA President, Lynne Koroush; SLSA Past President and New Governor, Dawn Forgeur, CCLS; Outgoing Treasurer, Deseree Gamayo and Baby Justin, Outgoing Secretary, Maimie Chyinski and SLSA Parliamentarian, Astrid Watterson, CCLS

SLSA's 74th Annual Installation of Officers



SLSA Parliamentarian, Astrid Watterson, CCLS; SLSA Past President, Sherri Lee Caplette, CCLS; and Mary S. Rocca, CCLS, LSI Past President 2004-2006



SLSA President, Lynne Koroush



Angela Diesch, Esq.; Sabrina Pedeupe; Corene Rodder; Miésa Ross; SLSA President, Lynne Koroush; Greg Sperla, Esq.; Jeff Leacox, Esq.; Carol Livingston, Esq.; Kathi Kossak; and Gene Livingston, Esq., all of Greenberg Traurig, LLP, Sacramento



SLSA President, Lynne Koroush and Kathi Kossak of Greenberg Traurig, LLP



SLSA President, Lynne Koroush and her daughters Amanda Gomes and Rachel Wickland



Lou Rocca, Mary S. Rocca, CCLS, LSI Past President 2004-2006, and Parliamentarian Astrid Watterson, CCLS

Membership Report

ACTIVE MEMBERSHIP

Welcome, and congratulations to the following new SLSA members, who were inducted at the April 18, 2013 meeting.

Rosanne Araujo – Rosanne is a paralegal at the Law Office of Anderson Schoech and has been employed as a legal professional since 2010. She specializes in litigation. Rosanne celebrates her birthday on July 13, and enjoys crossfit, camping, and cooking.

Christina Witt – Christina is a Senior Legal Analyst in the Office of Legislative Counsel. She has been a legal professional since 1990, and specializes in administrative law and personal injury. Christina celebrates her birthday on May 6.

Michelle Bowers – Michelle is employed as a legal assistant by Donahue Davies, and has been a legal professional since 1997. She specializes in litigation. Michelle celebrates her birthday on February 22, and enjoys surfing, wakeboarding, and houseboating.

Suzanne MacDonald – Suzanne is a legal secretary with the Pacific Legal Foundation. She has been a legal professional since 1982, and specializes in appellate law, litigation, and public interest law. Suzanne celebrates her birthday on April 22, and enjoys reading, sewing, crafts, gardening, and camping.

Dorothy Sames – Dorothy is a legal assistant with the Law Office of Eugene Haydu. She has been a legal professional since 2007, and specializes in litigation.

Michelle Griswold – Michelle is a paralegal with King Legal Corporation. She has been a legal professional since 2008, and specializes in bankruptcy, business/corporate law, family law, law office management, litigation, and probate/estate planning. Michelle celebrates her birthday on September 16, and enjoys event planning, interior design, and painting.

Michelle Van Dyke – Michelle is a paralegal/legal secretary with Low, McKinley, Baleria & Salenko. She has been a legal professional since 1987, and specializes in litigation. Michelle celebrates her birthday on May 27, and enjoys traveling, sports, reading, golfing, spending time with family and friends, her dog, and scrapbooking.

Yelena Williams – Yelena is an administrative assistant with the U.S. District Court, Eastern District. She has been a legal professional since 1985, and specializes in law office management and litigation. Yelena celebrates her birthday on April 19, and enjoys photography, catering, and event planning.



SLSA President, Lynne Koroush; Suzanne MacDonald and Yelena Williams

MEMBERSHIP UPGRADE

Congratulations to **Alyssa Hill**, who has been upgraded from Student Member to Active Member, as she has completed one year of employment in the legal field as of April 9, 2013.

MEMBERSHIP TRANSFER

Paula Hefley, CCLS – Paula is a legal assistant with Day, Carter & Murphy, and has been a legal professional since 1983. Paula specializes in oil and gas law. She celebrates her birthday on February 17, and enjoys gardening and cooking. Paula is a California Certified Legal Secretary and a Past President of SLSA (Paula Grenz, 1990-1991).

If you are interested in membership in SLSA, please contact Lynne Koroush at (916) 442-1111, or via e-mail at koroush@gtlaw.com.

Please Keep In Your Thoughts . . .

The following message was received from LSI President Sandra Jimenez, CCLS:



As many of you know, Ann Boccia Rosado lost her mother a couple of months ago, and now her husband, Robert, was in accident on April 11. He was riding his motorcycle when another driver ran a red light and hit him. He has extensive injuries but is alive and well. Unfortunately, she will not be able to attend Annual Conference because she now has to tend to her husband.

Ann has been through a lot this year; however, wants to continue working on the PRC. I commend her for her dedication and commitment. Please feel free to send cards of support and well wishes to Ann at: 948 W 19th Street, San Pedro, CA 90731.

Make a Difference for SLSA

SLSA needs you! There is still a vacancy on the Executive Board, as well as several important committees without chairpersons. These positions are critical to the operation and success of our association and allow us to continue to meet the educational and professional needs of our members. We could not do what we do without you! Contact President Lynne Koroush to MAKE A DIFFERENCE FOR SLSA!

Executive Board – Vice President

Day In Court Committee Chair

Interclub Committee Chair

Law Office Products & Management Committee Chair

Legal Professional of the Year/Boss of the Year Committee Chair

Professional Liaison

Programs Chair

Vendor Liaison

Ways & Means Chair

Fairytale Town Chair



Thank you to Officers and Chairpersons for 2012-2013

President: Dawn R. Forgeur, CCLS

Secretary: Maimie Chyinski

Parliamentarian: Astrid Watterson, CCLS

Vice President: Lynne Koroush

Treasurer: Deseree Gamayo

Governor: Melanie Herman

<u>Advertising</u>	Elizabeth Bomke, CCLS	<u>Budget Committee</u>	Alex Cain, Maimie Chyinski, and Melanie Herman
<u>Bulletin Editor</u>	Liz Gideon, CCLS	<u>CCLS</u>	Launa Atkinson, CCLS
<u>Charitable Projects</u>	Crystal Rivera, Teri McClory, CCLS and Corene Rodder	<u>Day in Court</u>	Rebecca Lerma and Crystal Rivera
<u>Employment</u>	Jamie Moralez	<u>Legal Procedures</u>	Debbie Frias, CCLS
<u>Legal Secretarial Training</u>	Astrid Watterson, CCLS	<u>Marketing and Membership</u>	Lynne Koroush
<u>Nominations and Elections</u>	Jaymie Moralez, Astrid Watterson, CCLS, and Crystal Rivera	<u>Programs</u>	Jennifer Rotz and Jennifer Sachs
<u>Programs-Lunch Lessons</u>	Anne French, Cynthia Biscarra, and Mary Taylor-Higgins	<u>Reservations and Reception</u>	Shelly Reyes
<u>Scholarship</u>	Anne French	<u>Vendor Liaison</u>	Lynne Koroush

Congratulations!

To SLSA member Katelynn Poulos on the birth of her daughter. Danielle Rene Poulos was born on February 21, 2013, weighing 7 lbs., 8 oz. Katelynn is happy to report that both she and baby Danielle are both doing well!



SLSA Membership Award

Congratulations to Elizabeth Bomke, CCLS, recipient of SLSA’s Membership Award for the 2012-2013 term. She attended every SLSA regular monthly meeting from May 2012 to April 2013! Elizabeth received a Membership Award Certificate which entitles her to attend two regular SLSA dinner meetings for free.



Historian’s Corner

Submitted by Jennifer Chastain

Let’s make this year’s History Book the best ever! Send any photos you take at any SLSA event to me, Jennifer Chastain, at chastainj@gtlaw.com.



Membership Renewal Time!

Membership renewals for the coming term are **DUE MAY 1, 2013!** Included in this newsletter is the 2013-2014 Membership Renewal Form, which can also be found on our website: www.slsa.org.

Dues for active members are \$40. Dues for Associate and Student Members are \$25.

Please make checks payable to "SLSA," and mail it with your renewal form to:

Maryanna Rickner, Treasurer
Sacramento Legal Secretaries Association
c/o Sacramento County Office of Education
P.O. Box 269003
Sacramento, CA 95826-9003



Renewals received after June 1, 2013, are considered late and an additional \$5 fee is required.

If you have coworkers or friends in the legal profession that are not members, please let them know how valuable and beneficial your membership is to you and encourage them to join! Membership applications can be found on our website at www.slsa.org.

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 koroushl@gtlaw.com.

Answers to the CCLS Quiz

⌂ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐



**Sacramento Legal Secretaries Association
Membership Renewal Invoice**

**Membership Period: May 1, 2013 – April 30, 2014
Due Date: May 1, 2013**

Make check payable to:
Sacramento Legal Secretaries Association

Amount Due: \$40
Renewals are due May 1, 2013.
There will be a late fee of \$5 after June 1, 2013.

Return the completed invoice and full payment to:
**Maryanna Rickner, Treasurer
Sacramento Legal Secretaries Association
c/o Sacramento County Office of Education
PO Box 269003
Sacramento, CA 95826-9003**

MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

Are you a CCLS? Yes / No

NAME: _____
BIRTHDAY: _____
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:

- Administrative Law
- Appellate Law
- Bankruptcy
- Corporate Law
- Criminal Law
- Environmental
- Family Law
- Labor and Employment
- Law Office Management
- Legal Support
- Litigation
- Personal Injury
- Probate/Estate Planning
- Real Estate
- Other: _____

MAILING/LISTING INFORMATION:

Where do you want your SLSA/LSI mail delivered? Business Residence
Where do you want e-mail delivered? Business Residence
Which address should be listed in the membership roster? Business Residence
If you do NOT want to be listed in the membership roster, check here: No roster listing

INVOLVEMENT:

Have you been awarded lifetime membership in SLSA? (If yes, return form only w/out dues) Yes No
Are you interested in volunteering as a committee chairperson or co-chairperson? Yes No
What topics and speakers would benefit you most this coming year? _____

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

**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:

Lynne Koroush, President
Greenberg Traurig, LLP
1201 K Street, Suite 1100
Sacramento, CA 95814

NAME OF APPLICANT _____ ARE YOU A CCLS? YES NO
EMPLOYER _____ POSITION _____
BUSINESS ADDRESS _____ CITY/ZIP _____
BUSINESS PHONE _____ BUSINESS E-MAIL _____
RESIDENCE ADDRESS _____ CITY/ZIP _____
RESIDENCE PHONE _____ RESIDENCE E-MAIL _____
EMPLOYMENT IN THE LEGAL FIELD (INCLUDE POSITIONS, DATES) _____

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

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

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

SIGNATURE OF APPLICANT _____ DATE _____
SPONSOR (IF ANY) _____ APPLICATION APPROVED _____

SLSA MEMBERSHIP CATEGORIES/ANNUAL DUES (Check One)

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

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

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

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

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

SLSA MEMBERSHIP APPLICATION (continued)

Name: _____ Birthday (MO/DAY) _____

Talents, Interests, Hobbies: _____

YOUR SPECIALTY:

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

EDUCATION:

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

TYPE OF OFFICE:

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

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

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

CHECK HERE IF YOUR EMPLOYER PAYS FOR YOUR MEMBERSHIP DUES

CHECK HERE IF YOUR EMPLOYER PAYS FOR MONTHLY DINNER MEETINGS

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

E-MAIL PREFERENCE? | BUSINESS | RESIDENCE

REGULAR MAIL PREFERENCE? | BUSINESS | RESIDENCE

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

How did you hear about SLSA? _____

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

Lynne Koroush, President
Greenberg Traurig, LLP
1201 K Street, Suite 1100
Sacramento, CA 95814



**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?

Where do you want e-mail delivered?

Which address should be listed in the membership roster?

If you do NOT want to be listed in the membership roster, check here:

- | | |
|--|-------------------------------|
| <input type="checkbox"/> Business | <input type="checkbox"/> Home |
| <input type="checkbox"/> Business | <input type="checkbox"/> Home |
| <input type="checkbox"/> Business | <input type="checkbox"/> Home |
| <input type="checkbox"/> No roster listing | |

Please submit to:

**Attn: Lynne Koroush
SLSA President 2013-2014
1201 K St., Ste. 1100
Sacramento, CA 95814
E-mail: president@slsa.org**

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Submitted by Dawn Forgeur, CCLS

LSI's Annual Conference is May 16-19, 2013, in San Jose. We would love to see SLSA members there to participate in an Officer or Chairmen Workshop on Friday, or one of the Legal Specialization Section Seminars on Friday and Saturday. A schedule is below and conference registration forms are included in this bulletin. If you will be attending let me know! governor@slsa.org

Officer/Chairmen Workshops — Friday, May 17

First Session 9:00 a.m. – 10:15 a.m.

Minutes/Notes/Correspondence/Corporate Office

Legal Secretary Training/Seminars Workshop

Parliamentarian Workshop

Day In Court Workshop

Career Promotion/Scholarship Workshop

Second Session 10:30 a.m. – 11:45 a.m.

Newcomer's Workshop

Governor's Workshop

Bulletin Editor Workshop

Legal Procedures Workshop

Marketing Workshop

Legal Specialization Section Seminars

Friday - May 17 & Saturday - May 18

Friday, May 17, 2:00 p.m. - 4:00 p.m.

Law Office Administration: Social Media & Privacy Issues for Employers - It's Not Going Away, It's Growing!

Transactional: Serving Subpoenas In Silicon Valley and Beyond

Friday, May 17, 4:30 p.m. - 6:30 p.m.

Civil Litigation: Trial Preparation—What To Do the Weeks Before Trial

Family Law: Preliminary Declarations of Disclosure - Requirements & Updates

Saturday, May 18, 4:00 p.m. – 6:00 p.m.

Probate/Estate Planning: Preparation of the 706 and Recent Changes In the Law

Criminal Law: Jeff Kettering, Merced County Probation Department



Chapter Achievement

Submitted by Governor, Dawn Forgeur, CCLS

There are many ways to help SLSA earn Chapter Achievement Points (CAPs), and there is a handy form in this bulletin that you may review and see some of the most common ways that you may be earning points for us.

Did you know that you can also help SLSA by submitting articles and court updates that you receive for use in an LSI Legal Specialization Section Newsletter? You can forward these updates to the appropriate LSS Leader (see below) and copy me on your email (governor@slsa.org) and I will count that submission towards our CAPs – YES, it's that easy!

Legal Specialization Section Leaders

Civil Litigation - Dawn R. Forgeur, CCLS - civil.litigation@lsi.org

Criminal Law - Christina Vieira - criminal.law@lsi.org

Family Law - Mary Lou Floyd, CCLS, M.S. - family.law@lsi.org

Law Office Administration - Tammy L. Hunt, CCLS - law.office.administration@lsi.org

Probate/Estate Planning - Kristi L. Edwards, CCLS - probate.estateplanning@lsi.org

Transactional Law - Lisa De La O - transactional.law@lsi.org

SLSA Past Presidents Welcome Dawn R. Forgeur, CCLS, Into Their Ranks



On April 18, 2013, Dawn R. Forgeur, CCLS, sounded the president's gavel for the last time. After serving a two-year term as SLSA's 51st President, she congratulated the newly-installed Executive Board and turned the gavel over to a new president. As Dawn stepped aside, she was surprised when several SLSA Past Presidents joined her at the front of the room to officially welcome her into their ranks. Dawn is now counted among the 50 other women who have served this Association as its President.

Dawn was also recognized for her leadership by the 2012-2013 Executive Board, and was presented with an engraved watch as a special gift of thanks and affection for her time and service to SLSA.

Dawn will continue as a member of the Executive Board, serving as Governor and Executive Advisor.

CHAPTER ACHIEVEMENT REPORTING FORM 2013-2014

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, 2013, through March 31, 2014.

Please complete this form and mail or email it to SLSA's Governor, Dawn Forgeur, CCLS. 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 2013-2014 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, 2014. (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: Dawn R. Forgeur, CCLS, Governor
Stoel Rives LLP
500 Capitol Mall, Ste. 1600
Sacramento, CA 95814
governor@slsa.org

Submitted by Jennifer Rotz



SLSA Programs Chair, Jennifer Rotz, and Guest Speaker Rebecca A. Gardner, Esq.

Rebecca A. Gardner, Esq. — HMS Law Group, LLP
“Free Speech & Social Media In the Workplace”

On Thursday, April 18, 2013, the Sacramento Legal Secretaries Association (SLSA) was honored to host Rebecca A. Gardner, Esq, as speaker. Rebecca is Of Counsel for HMS Law Group, LLP, where she specializes in general and complex estate planning, post-death trust and probate administration, business planning, and art law. She is also a part-time Lecturer in California State University, Sacramento’s Communication Studies Department, where she teaches a class entitled “Freedom of Speech.” Drawing on her expertise as an attorney and lecturer, Rebecca delivered an excellent presentation

on “Free Speech and Social Media in the Workplace.”

Rebecca began with a brief history of free speech rights in the United States, going over their foundation in English heritage and the establishment of the First Amendment in 1789. She explained that free speech is not unlimited. The speech that is protected is worthwhile speech, that is, speech that has value to society. Alternatively, there are categories of speech that are not protected, known as worthless speech. These categories are sedition, defamation, obscenity, and fighting words. Further, there are restrictions on the time, place, and manner of speech. For instance, speech that is considered free when stated on private property may be worthless speech when stated in a public forum.

She explained that free speech issues related to the internet are less straightforward and protections and restrictions to the same continue to be defined. There are challenges to regulating speech on the internet, e.g., low entry barriers, lack of gatekeepers, lack of control, and lack of geographic barriers. The internet also allows for anonymity, which present a challenge on its own. Rebecca discussed free speech issues in the workplace as well, explaining that speech as a private citizen differs from speech as an employee because employers have a right to avoid disruption and maintain efficiency in the workplace. She provided best practices for use of social media. She discussed how some employees avoid potential workplace issues by keeping their personal online persona separate from their professional online persona, e.g., using Facebook solely for personal contacts and LinkedIn solely for professional contacts. Rebecca suggested making good use of privacy settings on social media sites. In the end, she advised that an employee should be aware of free speech rights and restrictions and be very mindful of what he/she posts on social media sites.

“ . . .speech as a private citizen differs from speech as an employee because employers have a right to avoid disruption and maintain efficiency in the workplace.”

Rebecca graduated from California State University, Sacramento, with degrees in Government-Journalism and Humanities. She earned her law degree from University of California, Davis, and has been practicing law since 2003. Many thanks to Rebecca for spending the evening with us, just one week before her wedding! SLSA congratulates her on her recent nuptials and wishes her and husband, Rodney Moy, a lifetime of happiness.



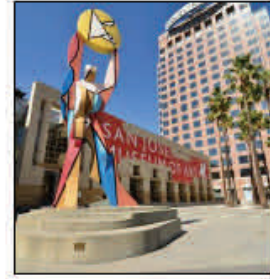
Santa Clara County Legal Professionals Association

invites you to celebrate

“LSI THROUGH THE YEARS”

May 16-19, 2013

Legal Secretaries, Incorporated’s 79th Annual Conference



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CONFERENCE REGISTRATION FORM

Name (as it will appear on badge): _____
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Please check if applicable (include title) Please check if you are:
 State Officer: _____ President Governor CCLS PLS
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SCRIP TICKET (includes Registration, Welcome Reception, Banquet and Brunch):

	<u>By Check:</u>	<u>By PayPal</u>	
POSTMARKED ON OR BEFORE April 16, 2013	\$140.00	\$145.00	\$ _____
POSTMARKED ON OR AFTER April 17, 2013	\$150.00	\$155.00	\$ _____

INDIVIDUAL TICKETS:

Registration by April 16, 2013	_____ @	\$20.00	\$21.00	\$ _____
Registration after April 17, 2013	_____ @	\$30.00	\$32.00	\$ _____
President’s Lunch (Friday)	_____ @	\$35.00	\$37.00	\$ _____
Governor’s Lunch (Friday)	_____ @	\$35.00	\$37.00	\$ _____
Newcomer’s Lunch (Friday)	_____ @	\$35.00	\$37.00	\$ _____
Welcome Reception (Friday)	_____ @	\$25.00	\$27.00	\$ _____
CCLS Lunch (Saturday)	_____ @	\$35.00	\$37.00	\$ _____
Banquet (Saturday)	_____ @	\$63.00	\$66.00	\$ _____
		<input type="checkbox"/> Beef	<input type="checkbox"/> Fish	
Brunch (Sunday)	_____ @	\$38.00	\$40.00	\$ _____

TOTAL AMOUNT PAID: \$ _____

Special Dietary Request (including VEGETARIAN): _____

MAKE CHECKS PAYABLE TO SCCoLPA 2013 CONFERENCE FUND

RETURN THIS FORM WITH PAYMENT TO: Elise Dresser, CCLS
2013 Annual Conference Registration Chair
911 Old Orchard Road, Campbell, CA 95008
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TO PAY BY PAYPAL: www.sccolpa.org (payment includes transaction fee)

No refunds after April 30, 2013



Santa Clara County Legal Professionals Association

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“LSI THROUGH THE YEARS”

May 16-19, 2013

Legal Secretaries, Incorporated’s 79th Annual Conference



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ACCOMMODATIONS: (Plus applicable taxes and fee)

- SINGLE: \$109.00 per night
- DOUBLE: \$109.00 per night

RESERVATIONS: https://resweb.passkey.com/Resweb.do?mode=welcome_ei_new&eventID=9697432
Check in: 3:00 p.m. - Check out: 12:00 p.m.

DEADLINE TO RESERVE YOUR ROOM IS APRIL 17, 2013 – BOOK EARLY!

- Parking:** Valet parking: \$26.00 per day – Off-site self-parking available next door at San Jose Convention Center and other nearby lots.
- Airport:** Norman Y. Mineta San Jose International Airport (SJC) is 3 miles from the San Jose Marriott.
- Transportation:** No hotel shuttle. Estimated taxi fare from SJC is \$15 one way.

For additional information contact:

Rod Cardinale, Jr.
2013 Annual Conference Chair
T: (408) 461-0972
Email: rodcardinalejr@sbcglobal.net



LEGAL SECRETARIES, INCORPORATED
Officers and Chairmen Workshops
 May 17, 2013

Moderator: J. Cori Mandy, CCLS, Educational Program Coordinator

Schedule: 8:30 a.m. Introductions and Workshop Overview – J. Cori Mandy, CCLS
 Location: Salon 5 & 6

10:15 -10:30 a.m. Coffee Break

President's Roundtable (Incoming/Outgoing Presidents Only) Moderators: Mary S. Rocca, CCLS and Patricia E. Miller, PLS, CCLS 9:00 a.m. to 11:45 a.m. Location: Willow Glen I	
First Session – 9:00 a.m. – 10:15 a.m.	Second Session – 10:30 a.m. – 11:45 a.m.
<u>Minutes/Notes/Correspondence/Corporate Office</u> Moderators: Jennifer L. Page, CCLS Executive Secretary Catherine Culver, CCLS, LSI Administrator Location: Willow Glen II	<u>Newcomer's Workshop</u> Moderator: Margaret Tovar, CCLS Liaison to Law Practice Management and Technology Section of the State Bar of California Location: Willow Glen II
<u>Parliamentarian</u> Moderator: Astrid B. Watterson, CCLS Parliamentarian Location: Willow Glen III	<u>Governor's Workshop</u> Moderator: Elizabeth Adame, CCLS Governor, Imperial County LPA PRC Assistant Editor Location: Willow Glen III
<u>Legal Secretary Training/Seminars</u> Moderator: Shaylene Cortez, CCLS Legal Secretary Training Chair Location: Blossom Hill I	<u>Bulletin Editor Workshop</u> Moderator: Michelle Tice, CCLS Editor, The Legal Secretary Location: Blossom Hill I
<u>Day in Court</u> Moderator: Lynne Koroush Day in Court Chair Location: Blossom Hill II	<u>Legal Procedures</u> Moderator: Jeffrey S. Weddle Legal Procedure Chair Location: Blossom Hill II
<u>Career Promotion/Scholarship</u> Moderator: Sylvia Marsh Career Promotion/Scholarship Chair Location: Blossom Hill III	<u>Marketing</u> Moderator: Jeremy Durant, BOP Designs Location: Blossom Hill III

Please note: Locations are subject to change.



Submitted by Jaymie Moralez

(4/30/13) Experienced Paralegal/Legal Assistant. Evers Law Group (“ELG”) is seeking an experienced Paralegal/Legal Assistant with at least seven years of litigation experience who is detail-oriented, proficient in WordPerfect and Abacus, has a working knowledge of the Code of Civil Procedure, strong transcription skills, and can create draft pleadings and discovery responses. This position offers a minimum of 35 hours per week or more, PTO days and paid vacation. ELG offers a casual and friendly environment. Email resume, cover letter, references and hourly rate wage requirements to k.evers@everslaw.com. No telephone calls please.

(4/30/13) Supervising Legal Secretary. Sacramento County is accepting applications for Supervising Legal Secretary through Tuesday, May 14, 2013 at 5:00 p.m. (Final File Date). The class performs a wide variety of specialized legal clerical work and supervises a staff engaged in legal and general clerical work. Applicants must have clerical experience involving the preparation and processing of legal documents for court action.

For a complete job listing http://agency.governmentjobs.com/sacramento/job_bulletin.cfm?JobID=597236, including minimum qualifications and salary, visit our website: www.saccountyjobs.net (700 H Street, Rm. 4667, Sacramento, CA 95814, or call (916) 874-5593).

4/30/13) Experienced Litigation Paralegal - Healthcare Litigation Law Practice. Murphy Austin Adams Schoenfeld LLP is a downtown law firm looking for a qualified paralegal candidate with five+ years of solid litigation experience to work in our Healthcare Litigation Law practice group. The successful candidate must be able to multitask in a fast-paced, professional environment, enjoy working as part of a team, and demonstrate a commitment to client service. In addition, excellent organizational skills and the ability to work with large volumes of documents are required. Top-notch computer skills and aptitude are additionally required. Advanced skills in Summation, Microsoft Word, Excel, Outlook and document management systems are required, with proficiency in Filesite, Access and Legal Mac-Pac a plus. The successful candidate must be able and willing to learn other software systems that support a litigation practice.

Murphy Austin offers a competitive salary and benefit package as well as a paralegal bonus program. Highly organized, detail-oriented, and motivated applicants should submit resumes to: Trish Hughes Kreis, Murphy Austin Adams Schoenfeld LLP, thkreis@murphyaustin.com.

(3/19/2013) Experienced Legal Secretary. Certified Family Law specialist seeking full-time experienced legal secretary. At least two (2) years of legal experience preferred. Motivated and ability to multi-task in a fast-paced environment. We are located on University Avenue, Sacramento. Professional and friendly work atmosphere, salary DOE. Email cover letter describing your experience and career goals with your resume to rbs@cwo.com.



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Submitted by Debbie Frias, CCLS

I have received notice from my state counterpart, Jeff Weddle from Orange County LSA that a Legal Procedure Blog has been set up and is running on the LSI website.

In order to access the blog, go to the LSI website at www.lsi.org; under the Members Only link, you will find a section entitled "Legal Procedure." If you are asked for the LSI password, it is currently CCLS (case sensitive). You may also access the blog via <http://www.lsi.org/blog/>. Please email your request to governor@slsa.org.

If you have anything to contribute to Jeff's blog, please send it to me or to President Lynne, for forwarding to Jeff. He also looks forward to receiving comments or suggestions, and we can send them to jweddle@awattorneys.com.

There are also increased fees for filing new civil cases in district courts, effective May 1, 2013. There is a new \$50 general administrative fee for filing a civil action, suit, or proceeding in a district court. This fee is in addition to the existing civil filing fee of \$350. So, effective May 1, the total fee for filing a new civil case will be \$400. This new fee is part of the District Court Miscellaneous Fee Schedule, established by the Judicial Conference of the United States, pursuant to 28 U.S. § 1914. This fee does not apply to persons granted *in forma pauperis* status under 28 U.S.C. § 1915.

Also, effective October 1, 2013, the USDC will migrate from WordPerfect to Microsoft Word. On October 1, all documents required to be submitted to the court in word processing format, pursuant to Local Rules 137, 163 and 281 (proposed orders, jury instructions and pretrial statements), must be submitted in MS Word. More information on the court's Word migration and modifications to the court's local rules will be provided on the court's website in the future.

I apologize if this is redundant, but our local rule is amended as to language to put into our notices of motions. I don't know about you, but I certainly do not want a motion denied for lack of proper wording in our documents! Local rule 1.06 Tentative Ruling system (D), states the following:

Pursuant to Local Rule 1.06(A) the court will make a tentative ruling on the merits of this matter by 2:00 p.m., the court day before the hearing. The complete text of the tentative rulings for the department may be downloaded off the court's website. If the party does not have online access, they may call the dedicated phone number for the department as referenced in the local telephone directly between the hours of 2:00 p.m. and 4:00 p.m. on the court day before the hearing and receive the tentative ruling. If you do not call the court and the opposing party by 4:00 p.m. the court day before the hearing, no hearing will be held.

That's it for now. Since changes are rampant through our courts this year, as you are made aware of changes, please email them to me so I may incorporate those changes into either an article or provide them to our members at monthly dinner meetings. My email address is dfrias@crowlawoffices.com.

Check out LSI's New Legal Procedures Blog!

www.lsi.org



LSI

Legal Procedures Update

Third Appellate District Court of Appeal – This court has moved to the Stanley Mosk Library and Courts Building at 914 Capitol Mall, Sacramento, California.

USDC – Eastern District

Notice of Increased Fees for Filing New Civil Cases - Effective May 1, 2013

Effective May 1, 2013, there is a new \$50 general administrative fee for filing a civil action, suit, or proceeding in a district court. This fee is in addition to the existing civil filing fee of \$350. Therefore, effective May 1, the total fee for filing a new civil case will be \$400.

This new fee is part of the "District Court Miscellaneous Fee Schedule", established by the Judicial Conference of the United States, pursuant to 28 U.S.C. § 1914. This fee does not apply to persons granted *in forma pauperis* status under 28 U.S.C. § 1915.

Notice of Microsoft Word Migration - Effective October 1, 2013

Effective October 1, 2013, the United States District Court for the Eastern District of California will migrate from WordPerfect to Microsoft Word. On October 1, all documents required to be submitted to the court in word processing format pursuant to Local Rules 137, 163 and 281 (proposed orders, jury instructions and pretrial statements) must be submitted in Word format.

More information on the Eastern District's Word migration and modifications to the court's local rules will be provided on the court's website in the future.



USDC - Central District

In order to adjust to the sequester cuts in the Court's budget, the United States District Court, Central District of California, will furlough staff and reduce Court services on specific Fridays between April 26 through the end of August 2013 in all three of its divisions – Western (Los Angeles), Southern (Santa Ana), and Eastern (Riverside).

The days on which the Court will be closed and only reduced services will be available are as follows:

Friday, April 26, 2013

Friday, May 24, 2013

Friday, June 21, 2013

Friday, July 12, 2013

Friday, July 26, 2013

Friday, August 16, 2013

Friday, August 30, 2013

The courthouses in each division will remain open on these days, but the Clerk's Office will be closed except for the following services:

The criminal intake section will be open to process bond-related matters, new arrests, and other documents necessary for the criminal duty calendar, which will continue to be held.

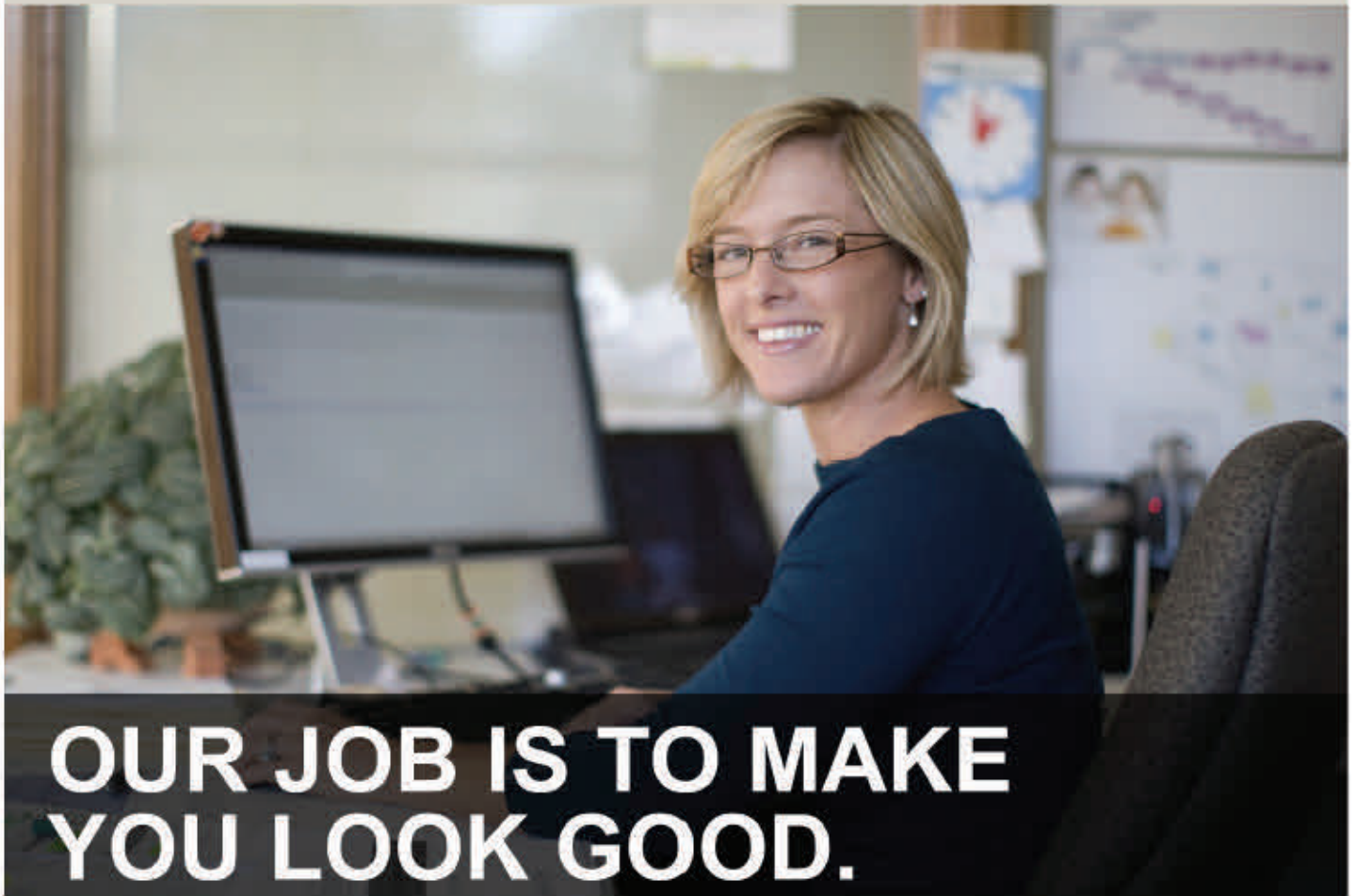
The following emergency civil filings will be accepted:

A new action where the statute of limitations expires that day.

An application for a temporary restraining order regarding an event that will take place prior to the next business day.

An application for a warrant for the arrest of a vessel regarding an event that must take place prior to the next business day.

CM/ECF will be available for electronic filing on Reduced Service days.



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Calendar/Dates to Remember



Wednesday, May 1— SLSA Membership Renewals for 2013-2014 Due

Sunday, May 12— Happy Mother's Day!

Monday, May 13—SLSA Executive Board Meeting, 6 PM, at Greenberg Traurig, 1201 K Street, Suite 1100, Sacramento.

Thursday, May 16-Sunday, May 19— LSI's 79th Annual Conference, hosted by Santa Clara LPA, San Jose Marriott.

Wednesday, May 22—BULLETIN ARTICLES DUE TO EDITOR

Monday, May 27—Memorial Day (Observed) – State and Federal Courts Closed

Saturday, June 1— Last Day to Submit SLSA Membership Renewals Without Incurring \$5 Late Fee

Monday, June 10— SLSA Executive Board Meeting, 6 PM, at Greenberg Traurig, 1201 K Street, Suite 1100, Sacramento.

Sunday, June 16— Happy Father's Day!

May Birthdays

Many happy returns to the following SLSA members who celebrate May birthdays!

Angie Lombard	May 4
Micky Kelly, CCLS	May 6
Christina Witt	May 6
Deseree Gamayo	May 11
Diane Gee	May 11
Jennifer Shelton	May 13
Teri McClory, CCLS	May 17
Ann Edwards	May 20
Sarah Hill	May 26
Jessica Patton	May 27
Michelle Van Dyke	May 27





Submitted by Kimberly Ann Smith

Have you considered joining one of LSI's Legal Specialization Sections? There's something there for everyone.

Joining just one, a few, or all of the Legal Specialization Sections provides access to continuing education workshops and seminars. Membership includes access to free quarterly newsletters containing up-to-date information, including changes in the law and forms, and with state budget cuts forcing many courts to change operating procedures this can be an invaluable resource; statewide roster of all members in each section for easy access to local procedural information in other counties.

Civil Litigation

Criminal Law

Family Law

Law Office Administration

Probate/Estate Planning

Transactional Law



The cost for LSI® members to join all six sections is \$75, or \$20 per section. Dues for non-LSI members is \$150 to join all six sections, or \$40 per section.

Besides the personal benefits to joining one of the legal specialization sections, if an SLSA member joins, our association can earn Chapter Achievement Points.

Discounts through Continuing Education of the Bar

Members of LSI are offered certain educational benefits (seminars, publication) through CEB at a reduced cost. For more information, visit <http://ceb.com/LSI/>.

Working Advantage

Members of LSI can receive discounts on movie tickets, theme parks, apparel, plays and more. Working Advantage provide promotional material to Corporate Office, who then forward the information to local associations. For more information contact: www.workingadvantage.com.

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 style="text-align: center;">DISCOUNT THROUGH CEB</p> <p>Members of Legal Secretaries, Incorporated are offered a reduced cost for certain educational benefits (seminars, publications) through Continuing Education of the Bar. For more information, visit http://ceb.com/LSI/</p>	<p style="text-align: center;">WORKING ADVANTAGE</p> <p>Toll Free: (800) 565-3712 www.workingadvantage.com</p> <p>Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more. Member ID: Contact LSI Corporate Office, lsior@ suddenlink.com, or LSI Vice President</p>
<p style="text-align: center;">HERTZ CORPORATION</p> <p>Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com</p>	
INSURANCE AND FINANCIAL PROVIDERS	
<p style="text-align: center;">AFLAC AND WORKER'S COMPENSATION QUOTES</p> <p>Steven C. Dannenberg (Independent Broker) 11091 Rhyolite Drive, Suite 4 Redding, CA 96003 Direct: (530) 339-5889 - Office: (530) 243-9879 Fax: (530) 243-9880 E-mail: dannenberginsurance@gmail.com</p> <p>Offering supplemental insurance for Accident, Sickness, Cancer, Dental, Hospital Indemnity and Heart Attack/Stroke.</p>	<p style="text-align: center;">CAPITAL INVESTMENT ADVISERS</p> <p>Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 www.ciadvisers.com</p> <p>Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>
<p style="text-align: center;">DWORKIN INSURANCE SERVICES</p> <p>Earl Dworkin 467 Hamilton Avenue, Suite 1 Palo Alto, CA 94301 Office: (650) 329-1330 or (800) 332-4313 Fax: (650) 329-9957 www.dworkininsurance.com</p> <p>Offering Individual and Family Medical Insurance, Travel Medical, Medicare Supplements, Dental Plans, and Part D Prescription Drug Plans</p>	<p style="text-align: center;">LEGACY WEALTH MANAGEMENT</p> <p>Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz</p> <p>Offering discounted John Hancock Long Term Care Insurance and Life Insurance, Annuities, Retirement, Investment and Estate Planning, Mutual Funds, and 401K.</p>
<p style="text-align: center;">DAVID WHITE & ASSOCIATES</p> <p>Wealth Accumulation and Preservation 3150 Crow Canyon Place, Suite 2000 San Ramon, CA 94583 (800) 548-2671 Contact: Ryan Gonzales (ext. 2682), rgonzales@dwassociates.com, or Matt Kay (ext. 2628), mkay@dwassociates.com</p> <p>Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance.</p>	<p style="text-align: center;">MWG FINANCIAL AND INSURANCE SERVICES</p> <p>Jory Wolf, President/Founder 6333 Greenwich Drive, Suite 210 San Diego, CA 92122 Office: (858)888-7300 Cell: (510)919-9062 jory@mwgfinancial.com</p> <p>California Insurance License: 0E88330 Individual disability insurance solutions</p>
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<p style="text-align: center;">LA FINANCIAL FEDERAL CREDIT UNION</p> <p>P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org</p> <p>Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p style="text-align: center;">PROVIDENT CREDIT UNION</p> <p>303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 www.providentcu.org</p> <p>All LSI members are eligible to join.</p>

QUESTIONS AND CONCERNS CONTACT:
Mary J. Beaudrow, CCLS, LSI Vice President
LSI Marketing Committee Coordinator
939 Hough Avenue, #22, Lafayette, CA 94549
Cell - (415) 717-5675
marybeau@comcast.net



LEGAL SPECIALIZATION SECTION SEMINARS
LSI Annual Conference – May 16-19, 2013 – San Jose Marriott
Hosting Association: Santa Clara County LPA
REGISTRATION FORM - DEADLINE IS Monday, May 6, 2013



Registration **MUST** be **RECEIVED** by the LSS Coordinator **on or before the deadline.**

Please make advance reservations so materials may be prepared. Please check all appropriate boxes below.

LSI SECTION MEMBER: Free with Advanced Reservations \$5.00 at the Door/After Deadline Handout Only: \$5.00	LSI NON-SECTION MEMBER: \$10.00 with Advanced Reservation \$15.00 at the Door/After Deadline Handout Only: \$10.00	NON-LSI MEMBER: \$15.00 with Advanced Reservation \$20.00 at the Door/After Deadline Handout Only: \$15.00
Friday, May 17, 2013 – 2:00 to 4:00 p.m.		
<u>LAW OFFICE ADMINISTRATION:</u> Topic: <i>Social Media and Privacy Issues for Employers: It's Not Going Away – It's Growing!</i> Speaker: Jeanine Debacker, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>TRANSACTIONAL:</u> Topic: <i>Serving Subpoenas in the Silicon Valley and Beyond</i> Speaker: Mark Schwartz, One Legal <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
Friday, May 17, 2013 – 4:30 to 6:30 p.m.		
<u>CIVIL LITIGATION:</u> Topic: <i>Trial Preparation: What To Do During the Weeks Before Trial</i> Speaker: Tyler Atkinson, Esq.; Hon. Greg Ward (ret.); James McManis, Esq.; Cindy McClelen, paralegal <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>FAMILY LAW:</u> Topic: <i>Preliminary Declarations of Disclosure: Requirements and Updates</i> Speaker: Lynne Yates-Carter, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
Saturday, May 18, 2013 – 4:00 to 6:00 p.m.		
<u>PROBATE/ESTATE PLANNING:</u> Topic: <i>Preparation of the 706 and Recent Changes in the Law</i> Speaker: Darin Donovan, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>CRIMINAL LAW:</u> Topic: <i>AB 109</i> Speaker: Jeff Kettering, Merced County Probation Department <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	

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 925-523-3086 (fax) ~ clkcls@comcast.net

Send a self-addressed, stamped envelope if you wish confirmation of your reservation.

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Speakers and Topics are Subject to Change

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Parliamentarian's Corner

Submitted by Astrid Watterson, CCLS

A new fiscal year begins! A huge congratulations to the incoming board and chairmen. Some are returning, while others are breaking out of their "box" and trying something new. As a continuing parliamentarian, here are a few reminders for the members and the chair. According to *Robert's Rules of Order In Brief*, 2nd Edition, there are six steps to being an effective presiding officer:

1. Memorize constantly used procedures. In SLSA, we have our members use the red voting cards instead of a voice vote. This helps the president be able to see if there is a majority. When a 2/3 is required, a counting vote is necessary.
2. Make sure that everyone knows what is being debated and voted on. It is up to the president to ensure that motions are properly repeated and that an explanation as to the effects of an amendment are made clear to all members.
3. Learn how to conduct voting. That ties into step one, knowing when you need a majority or a 2/3 vote.
4. Know the steps in a meeting. The use of an agenda is helpful to ensure that business is conducted in an effective manner.
5. Learn how to handle points of order. Thankfully in our local association, we don't usually have any of these types of motions, but an effective president will know how to utilize their team and ensure that the motions as well as the business of the association is conducted according to the rules.
6. Know more about parliamentary procedure than most others. This is true, although an effective leader will also know when to delegate and ask for assistance. The president has the ability to appoint an executive advisor who can assist with historical issues and a parliamentarian who can assist with parliamentary procedure.

As we move forward in this new fiscal year, I hope to have short articles regarding each of the executive board members. Perhaps that will not only assist those in current office, but entice new members to join and help continue to guide our association of legal professionals in the future.

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



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SUNDAY, AUGUST 18 • 1:05PM

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CCLS Quiz

Submitted by Launa Atkinson, CCLS

After an original Will is stapled, it can be unstapled for any purpose.

True b. False

Title to real property is conveyed by obtaining a certified copy of the order or judgment and then recording it in each county in which real property is located.

True b. False

A holographic Will must be submitted along with a typewritten counterpart setting forth the Will in its entirety.

True b. False

If the total estate warrants, a United States Tax Return (Form 706) must be filed and any taxes paid within eight months of date of death.

True b. False

A family allowance is available only if the decedent is survived by a spouse.

True b. False

The proper county for administration of a decedent's estate is the county of which decedent was a resident at the time of death, wherever death occurred.

True b. False

Joint tenancy items are treated as estate assets and included in the Inventory and Appraisal.

True b. False

Any person interested in an estate may file a Request for Special Notice.

True b. False

In a probate, compensation paid to an executor or administrator is less than the attorney's compensation.

True b. False

It is not necessary to attach a certified copy of a death certificate to an Affidavit – Death of Joint Tenant.

True b. False

[Answers on page 8](#)

CCLS Vocabulary

CCLS Vocabulary: Probate Terms

Administrator: The person appointed by the court to act as a probate estate's representative when the decedent leaves no Will.

Administrator With Will Annexed: The person appointed by the court to act as a probate estate's representative when the person named in the Will as executor is deceased or is unable to act.

Intestate: One who dies without a valid Will.

Testate: One who dies leaving a valid Will.

Bequest: A gift of personal property by Will.

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

Testator: The person who makes a Will.

Codicil: A supplemental to a Will.

Heir: One who is entitled to the property of a decedent under the statutes of intestate succession.

Probate: Judicial process of proving a Will and carrying out its provisions, and/or administering an estate.

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WordPerfect to MS Word: Last of the Great Migration?

As we heard from SLISA's Legal Procedures Chair, Debbie Frias, CCLS, effective October 1, 2013, the U.S. District Court will migrate from WordPerfect to Microsoft Word. On that date, all documents required to be submitted to the Court in word processing format (proposed orders, jury instructions, and pretrial statements) must be submitted in MS Word format.

The following excerpt is from "Why Lawyers Love WordPerfect," an article that appeared in a recent issue of *Next Gen Law*. While the great debate still exists over which is better -- WordPerfect or MS Word -- particularly for legal users, the discussion below reminds us that all things, especially in the sphere of computer technology, eventually make the Great Migration.

No one can deny the importance WordPerfect has earned in the history of law. It provided a tool that changed the way lawyers work. Gone are the days of longhand and dictation — now lawyers type. This competitive edge cut document turn-around time and improved attorney-staff ratios, causing law offices to convert en masse to PC-based word processing with WordPerfect in the 1980s and 1990s.

Those were the glory years. Early on, Utah-based WordPerfect Corp. proclaimed a commitment to develop features for the legal market, and legal users have held WordPerfect close to their hearts ever since. They will gush with very little provocation:

"WordPerfect is ideal for a law office because of its flexibility and transparency. In Word you are forced to do things the Microsoft way, in WordPerfect you can do it your own way."

"Word is for amateurs, WordPerfect is for pros."

"WordPerfect is popular in the legal market because we've paid close attention to our customers' needs and have given them tools that make sense for what they need to accomplish — whether it's precise layout, PDF functionality or features like meta-data removal," said Jason Larock, Corel's Director of Product Management for WordPerfect Office. "We're always talking with our legal customers to ensure that WordPerfect continues to evolve to meet their needs."

"... the popular success of MS Word has created pressure on law firms to adopt MS Word ..."

With the early development of features like automatic paragraph numbering, Table of Contents, and Table of Authorities, and add-ons like Black's Law dictionary and citation software, WordPerfect caught fire internationally, everywhere law was practiced in English.

Many who've walked both sides of the street say WordPerfect's customizability and automation features make it the technical winner of the contest against Microsoft Word. Law office users say the precise control WordPerfect provides for tasks like footers and pleadings makes it "easier to learn and operate for creating documents in legal format."

Why do lawyers still love WordPerfect? One attorney answers with, "Two words: Reveal Codes. At one point about ten years ago, I tried switching to Word. My secretary and I agreed we hated it after only a few weeks."

Attorneys say macros and merge forms are easier in WordPerfect, and they love the legal-specific features, such as paragraph numbering, Table of Contents, and Table of Authorities. Many also think page-numbering, columns, and tables are easier to work with in WordPerfect.

But marketing factors chose a different popular winner. Though Microsoft was late to the PC word processing game, MS Word started to take off when Windows blossomed after version 3.0 was introduced in 1990, sounding the near-death knell for WordPerfect, though no one knew it at the time. The years have made clear that it is tough to compete against Microsoft, given its size, name recognition, and the authority that comes from authoring the operating system we all love and hate.

Of course, the corporate owners of WordPerfect shot themselves in the foot more than once. When WordPerfect made the leap from DOS to Windows, it was late to market and performed poorly, a combination of management neglect from Novell and Microsoft keeping secrets about Windows code. Profit pressures came to the fore when Corel acquired WordPerfect from Novell in 1996. To squeeze profits from support, Corel abandoned free telephone tech support and discontinued printed manuals.

Law Office Products and Management - Continued

The simple fact is that most users and most markets need only light-weight word processing, but the document factories of the legal market need more powerful tools. Microsoft has won the larger market with aggressive marketing and bundling, and this includes the clients of law firms. So, the popular success of MS Word has created pressure on law firms to adopt MS Word as well. Like VHS vs. Beta, the popular product is quashing the better one.

Can WordPerfect hang in there? IT industry analyst Allan Hurst of Fremont, California, sums it up. "I think the advantages are diminishing, especially as third-party support for WordPerfect continues to wane." Bill Lundy, IT director at Coblenz, Patch, Duffy & Bass, LLP in San Francisco, made the switch. "Word finally made some improvements to their auto-numbering and other features, and legal-focused macro packages became more sophisticated."

Corel needs to continue being aggressive to avoid fading away. Some users suggest the folks at Corel "redeem themselves and leap ahead of Word by improving and extending customer support" — particularly telephone access and the quality of the Help function. If Corel plays its cards right, it can count on a loyal user base. As one user put it, "As long as there is a conversion program, I will always use WordPerfect." Another agrees, "I will continue to support WordPerfect until Microsoft pries this software from my cold, dead hands!"

Vendor Spotlight May 2013: Esquire Deposition Solutions

SLSA was very pleased to have Allie Steinmuller of Esquire Deposition Solutions as our April Vendor of the Month. While many of our members are familiar with Esquire, Allie updated us on what Esquire is offering in the way of the latest in deposition technology and court reporting services. Specifically, she discussed EsquireView.

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Thank you, Allie, and all the folks at Esquire Solutions for being SLSA's Vendor of the Month! You can contact Allie at:

Allie Steinmuller | Regional Litigation Consultant

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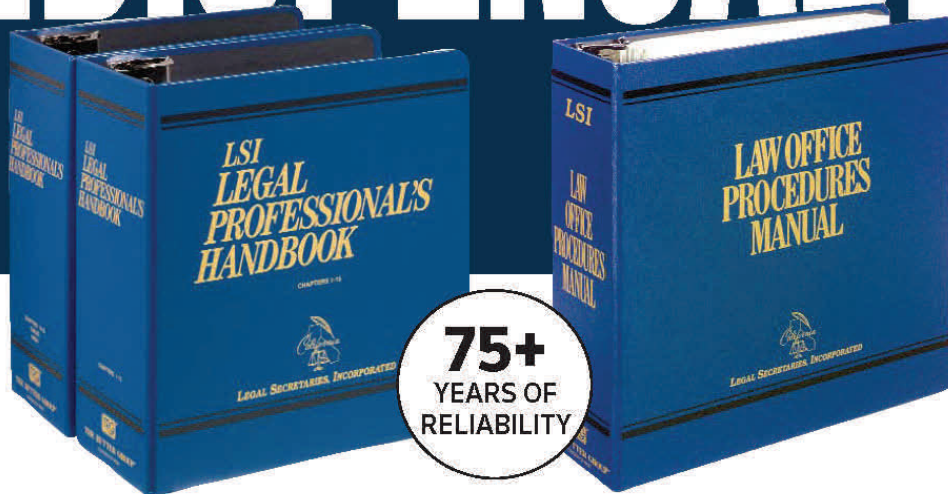
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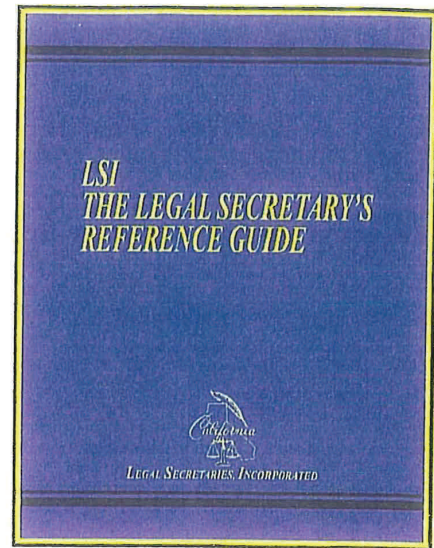
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OUR MISSION STATEMENT

The 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.



Editor’s Note

Submitted by Corene E. Rodder

I was honored and excited when SLSA President Lynne Koroush asked me to be the new Editor of The Legal Eagle. The Legal Eagle always welcomes letters and article suggestions from readers. Please send them to: Corene E. Rodder, c/o Greenberg Traurig, LLP, 1201 K Street, Suite 1100, Sacramento, CA 95814 or rodderc@gtlaw.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.

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