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## Sacramento Legal Secretaries Association



## Theme of the Month:

# Estate Planning/Probate

### Events

- **Lunch Lesson – November 15.** Topic: “What Could Go Wrong? - Estate Planning/Probate.” This event will be held at the law offices of Downey Brand, 621 Capitol Mall, 18th Floor. Please contact Sophia Albov, CCLS at [salbov@cookbrown.com](mailto:salbov@cookbrown.com) if you would like to register. *See page 19.*
- **Dinner Meeting – November 18.** Topic: “Estate Planning and Probate Law.” This event will be held at the Courtyard Marriott, 4422 Y Street. You can register online through our website or contact Jennifer Shelton at [jshelton@murphyaustin.com](mailto:jshelton@murphyaustin.com). *See page 16.*
- **Birthday Magic – November 19.** SLSA is sponsoring Birthday Magic. This event will be held at the Cowell Children's Center located at 2820 14th Avenue. We need volunteers to help facilitate this event. If you are interested in joining, donating or have further questions, please contact Gloriela Garcia @ [gloriela.garcia@calegacylaw.com](mailto:gloriela.garcia@calegacylaw.com). *See page 11.*

## 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.

NON-MEMBERS ARE WELCOME!



# President's Report

by Astrid Watterson, CCLS



It's definitely Fall weather. November is upon us and so are many other activities. Before we head into November, let's recap October. Another fabulous SLSA month; October was a successful month for SLSA. We held classes in the areas of bankruptcy, corporations, summation, and grammar. We also participated in the annual Fairytale Town Monster Mash event. A team of SLSA volunteers, and in some cases their children as well, were led by Jennifer Estabrook, CCLS and Ron Bodenmann in handing out candy and helping children with their arts and crafts. Children dressed in all kinds of cos-

continue to offer our monthly grammar classes, but this month we will not have an evening seminar. The evening seminars are usually held on the last week of the month, but with Thanksgiving and our holiday schedules, we decided to hold off on the evening seminars in November and December. Don't worry; they will be back in January. November is Probate and Estate Planning month. Our lunch lesson will cover the basics, while our general meeting will cover the litigation portion of probate as well as some of the differences and similarities you will find in a probate litigation matter.

day, we will distribute it to our members. If you can help by purchasing a small gift for that child or by donating your time to attend the birthday celebration, please let Gloriela know.

In October, I was able to send our members important updates regarding fee changes in the courts. As we receive notice of changes in legal procedure, the association either through the bulletin or an e-mail from the President, tries to send you updates. Do you like this feature? Do you like to be informed? Is the association providing you the educational needs you would like? Are we providing you with

## What would happen to SLSA if nobody ran for office or volunteered to serve on a committee? ~Astrid Watterson, CCLS

tumes walked through our "Dracula's Lair" to receive candy, color vampires or witches, and even draw with chalk a few of their favorite monsters. It was such a fun event and it was even more fun to see some of our members dressed up with their children. We had witches, vampire-bitten maidens, vampires, zombies, several of the "undead," and of course, so that we didn't totally scare the little ones, we incorporated "Gingy" the gingerbread man from Shrek. He was a hit! Events like this one bring our members together and can be so much fun!

After all of that excitement, what do we have in store for you for November? We have conference in November, which will be in North Hollywood. If you haven't registered for conference yet, there is still time to do so. We will

In November, we also have our Birthday Magic event. We are contributing to the Volunteer Center of Sacramento Children's Home Birthday Magic event. SLSA will be coordinating a birthday celebration for children whose birthday falls in November. The Children's Home has a maximum of 14 children at a time. Many of these children don't have a home of their own and no one to celebrate their birthday. Volunteer organizations such as ours, come in and donate their time and a little money to buy presents, a cake, provide entertainment, and an overall good birthday celebration for these children. SLSA's member and charitable projects co-chair Gloriela Garcia is in charge of this event. A flyer is included in the bulletin. Once the Home has distributed a "wish list" for the child's birth-

enough activities? Do you like the articles in the bulletin? Do you like the features on the website and Facebook? If you do, that's great! However, it takes a group of volunteers to make this happen. We are the second largest association in Legal Secretaries, Inc., yet every year, we struggle to find volunteers and people to run the association. At times it can seem overwhelming, especially if you are new to the job, but if you have enough volunteers, it can be easy and, dare I say ... fun? However, we can't provide you with the level of service you have had this year unless we have volunteers. Are you ready to run for office? What would happen to SLSA if nobody ran for office or volunteered to serve on a committee? We have 176 members and it is my sincere hope that come February, we have many

*"Coming together is a beginning. Keeping together is progress. Working together is success."*  
~Henry Ford



# President's Report (cont.)

by Astrid Watterson, CCLS

who step up and decide to run for office. If you like what the association has to offer, I encourage you to take the lead and run for office or volunteer to be on a committee. Jennifer Estabrook, CCLS and Ron Bodenmann did just that. They took care of our Fairytale Town event. The project is done and while there are a few administrative tasks that go along with wrapping up the event, for the most part, their

duties are complete for the year. What can you do? What does your schedule allow you to contribute to SLSA? If you have questions regarding any of the chairman positions or the executive board positions, let us know. Each year, the team changes and how things are approached may change as well. My personality and approach is different than others, but the rules remain the same and so do the goals – to fur-

ther our education and knowledge.

Many thanks to our current volunteers for all that they have done to make each month a success. I am thankful to have a great team this year! Thanks to all of you for electing me President.

Astrid Watterson, CCLS

"What does your schedule allow you to contribute to SLSA?"  
~Astrid Watterson, CCLS

# Benefit Highlight

by Dawn Forgeur, CCLS

Working Advantage offers are just in time for the Thanksgiving holiday! Take advantage of LSI's discount for car rental discounts, or to purchase your centerpiece for the holidays, or even get a discount to send a gift to your out-of-town family this holiday.

Drugstore.com – New customers get free shipping and a \$25 Restaurant.com gift certificate with your \$25 order, thru 12/31/10

Gourmetgiftbaskets.com - \$10 off orders \$80+, thru 11/30/10. \$5 off orders \$40+, thru 11/30/10. 20% Off Coffee and Chocolate Baskets, thru 1/15/11

1800flowers.com - 20% off flowers & gifts

FTD.com - Save 20% on flowers, plants and gifts

Avis - Save 10% on weekend rentals, thru 12/31/10. Save 15% on weekly rentals, thru 12/31/10.

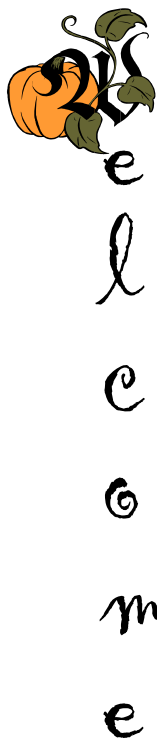
Log on to [www.workingadvantage.com](http://www.workingadvantage.com). E-mail Patti Alexander for SLSA's member code at [palexander@aklandlaw.com](mailto:palexander@aklandlaw.com).



# CHANGE OF ADDRESS:

Please remember if you have moved offices or home, be sure to send us your Change of Address form so that we can update our records. This will minimize any delay in your receiving our monthly bulletin, any correspondence, and the LSI quarterly magazine. The change of address form can be found in this bulletin or on our website. They should be mailed to our Vice President and Membership chair, Anne French to her work address at Downey Brand, 621 Capitol Mall, 18th Floor, Sacramento, CA 95814.





# Membership Chair Report

by Anne French

*Hello everyone. We had a great turn out at the Fairytale Town event last month. Thank you to everyone who volunteered. In November, we will be participating in Birthday Magic and could use volunteers.*

*If you're not a member, you can contact me at (916) 520-5268 or e-mail me at [afrench@downeybrand.com](mailto:afrench@downeybrand.com) for information regarding membership.*

*Below are our new members that have recently joined SLSA.*

**JULIA DILES** – Julia is a legal assistant for The Britt Gilbert Law Group. She has been a legal professional since 1987. Julia celebrates her birthday on June 19. She specializes in business/corporate law and litigation. Julia enjoys cooking, entertaining, travel, community, church, sewing, and laughter.

**CHRISTINA MCKINNEY** – Christina is a receptionist for Fredericks, Peebles & Morgan. She has been a legal professional since 1995. Christina celebrates her birthday on November 3. She specializes in litigation. Christina enjoys camping, motorcycle riding, and spending time with family.

**KRISTEN E. MOE** – Kristen has been a legal professional since 2005. She celebrates her birthday on March 28. Kristen specializes in family law. She enjoys baseball, football, basketball (Sacramento Kings fan), bowling, going to concerts (especially country music), and spending time with family and friends.

*Are you an SLSA member who has 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 good times and support you during tough times. Please send your news to [afrench@downeybrand.com](mailto:afrench@downeybrand.com).*

# Of Note

## EASTERN DISTRICT BANKRUPTCY COURT INFORMATION

Statistical Data Will Be Required to Electronically File New Bankruptcy Cases as of October 5, 2010, in the Eastern District Bankruptcy Court.

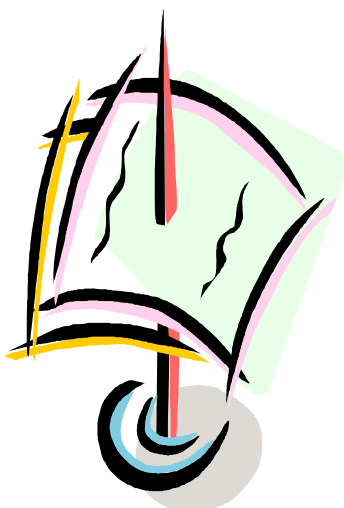
Effective October 5, 2010, debtor information in the statistical data file uploaded with an electronically filed petition will be used to open the new case instead of the manual data entry currently done by Clerk's Office staff.

For e-Filers of petitions who do not use petition preparation software to create the file, MUCH MORE statistical data, as well as all debtor names and addresses, will have to be entered manually. Because the amount of data required is significant, e-Filers not currently using petition preparation software may wish to consider using it.

e-Filers who use petition preparation software will not be required to enter this data as most software packages already create the necessary statistical data file.

## SACRAMENTO SUPERIOR COURT INFORMATION

Don't forget that filing fees for Sacramento Superior Court have changed effective November 1, 2010. Please check their website, call the court, or see the notice included in this bulletin.



# How Do I?

*Question submitted by Anne French*

Have many of you been confused regarding what should go in the signature block of a pleading filed in the Eastern District Bankruptcy court? Well, according to local Bankruptcy Rule 9004-1(c)(1) it should be as follows:

(1) Signatures on Documents Submitted Electronically.

(a) Signature of the Registered User. The user-name and password required to

access the electronic filing system shall serve as the registered user's signature on all electronic documents filed with the court. They shall also serve as a signature, with the same force and effect as a written signature, for purposes of the Federal Rules of Bankruptcy Procedure and the Local Bankruptcy Rules of this court, including FRBP 9011-1 and LBR 9004-1(c), and for any other purpose for which a signature is required

in connection with proceedings before the Court. Unless the electronically filed document has been scanned and shows the registered user's original signature or bears a software-generated electronic signature thereof, an "/s/" and the registered user's name shall be typed in the space where the signature would otherwise appear.



## QUESTIONNAIRE

For Day in Court

Email submissions to [lermar@gtlaw.com](mailto:lermar@gtlaw.com)



Sacramento Legal Secretaries Association's annual Day in Court Event is scheduled for **Thursday, January 20, 2011**. We have invited guest speakers from Amador, Butte, El Dorado, Placer, San Joaquin, Stanislaus, Sacramento, Solano, Sutter, Yuba and Yolo counties as well as the Third Appellate District Court of Appeals.

We are planning to send each court a list of 10 questions and compiling a Frequently Asked Questions handout based on the responses received. The questions should be able to be answered in 1-3 sentences and be general questions that could be asked of each court. If you have a question in mind, please email your suggestions to Rebecca Lerma at [lermar@gtlaw.com](mailto:lermar@gtlaw.com) or fax this form to Rebecca at 916-448-1709.

Question(s) for the Court: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name (not required): \_\_\_\_\_ Email (not required): \_\_\_\_\_



*"As a member of SLSA, you have a right to vote and to make motions at the business meetings."*  
~Astrid Watterson, CCLS

# Parliamentarian's Corner

by Astrid Watterson, CCLS

How Do You Make A Motion?

As a member of SLSA, you have a right to vote and to make motions at the business meetings. In our case, our business meetings are generally held on the third Thursday of the month; that is when our dinner meetings are. Before you can make a motion, you should probably know what a motion is. Robert's Rules of Order states that a motion is a formal proposal by a member, in a meeting, that the group take certain action. A main motion is one whose introduction brings business before an assembly.

Only one main motion may be before the assembly for action at a time. This means that if you have an action or a proposal you would like to bring before the association, you would do so at the general membership in the form of a motion.

How do you get to speak at a meeting in order to make your motion? First, you need to be acknowledged by the chair (usually the President). You raise your hand or stand and say, "Madame President!" You need to wait to be recognized by the chair. Once you are recognized, then you have the right to speak up. Once you have been recognized and you have the right to speak, it's considered "having the floor." This is now the appropriate time to make your motion (proposal). You do that by saying: "I move that ...." Robert's Rules emphasizes the fact that it is very important to say precisely what the words of the motion are to be. This not only helps the Secretary, but will also be necessary for the voting process.

For example, what if SLSA's logo colors were blue and yellow, but you wanted to

change it to pink and purple?

**Jane Legal:** "Madame President!"

**Chair:** "Yes, Ms. Jane."

**Jane Legal:** "I move that SLSA's logo colors be changed from blue and yellow to pink and purple."

At this time another member would "second" the motion, which according to Robert's Rules, means simply that the motion may be considered. It does not mean that they are voting for it or against it, only that the motion can be discussed. Once a motion has been introduced and is on the floor for discussion, the chair repeats the motion and opens it up for discussion to all.

Next month, we will discuss amending a motion. For now, you at least know how to properly be acknowledged and make a motion.

# Vendor Spotlight

## October Lunch Lesson: Don Benson of Edward Jones Investments

by Jaymie Moralez



*Pictured from left to right: Kristi Baughman and Don Benson of Edward Jones Investments*

Our vendor of the month for SLSA's October lunch lesson was Edward Jones Investments, and Don Benson spoke on their behalf. How should I plan for my retirement? How can I lower my tax bill? If you have questions such as: How can I plan for my children's education? Then Edward Jones Investments might be the place for you. Edward Jones Investments offers a wide range of investment options as well as other services to help you plan your future regardless of your current

age, income, or goals. Edward Jones Investments has many resources to help you find your way and they also have over 10,000 offices to service your planning needs. To learn more about Edward Jones Investments or to contact an office near you, please check out there website at [http://www.edwardjones.com/en\\_US/index.html](http://www.edwardjones.com/en_US/index.html).



# Second Annual Bay Area Legal Secretaries, Inc. LEGAL TRIVIA THROWDOWN!



Sacramento Legal Secretaries Association invites you to join us for an inter-association, fun competition. Gather your association members and form a team. We will be competing in a Jeopardy game show format. There is no limit to the number of members on your team. All contestants must be active LSI members.

Everyone is welcome for lunch and cheering!

All Jeopardy questions are from CCLS materials. You do not have to be a CCLS to participate. The winning association will be presented with a plaque and bragging rights for a year!

**WHEN: Saturday, February 5, 2011**  
**TIME: 11:30 a.m.**  
(Approximately 2 hours for lunch and competition)  
**WHERE: Scott's Seafood & Grill**  
**Jack London Square**  
2 Broadway, Oakland, CA  
Tel: (510) 444-3456  
**\$28 LSI Members/\$29 Non-Members**

Space is limited. Please RSVP by January 14, 2011.  
Late registrations must add \$3 for reservations made after January 14, 2011.

NAME: \_\_\_\_\_  
ASSOCIATION NAME: \_\_\_\_\_  
EMAIL: \_\_\_\_\_ TELEPHONE: \_\_\_\_\_  
WILL YOU BE COMPETING? \_\_\_\_\_ Yes \_\_\_\_\_ No

**Indicate Entrée Selection:**

- Chicken Piccata (Sautéed with Lemon-Butter Caper Sauce, served with Herbed Rice and Fresh Vegetables)
- Pasta Primavera (Fresh Pasta with Julienned Vegetables topped with Grana Cheese)

Complete and detach reservation form. Enclose **check payable to SLSA** and mail to:  
Diane West, CCLS  
Law Offices of Richard W. McGinnis  
2999 Douglas Blvd., Suite 185  
Roseville, CA 95661  
  
If you have any questions, please contact:  
Diane West, CCLS  
email: dwestmcginnis.law@hotmail.com  
or  
Launa Atkinson, CCLS  
email: latkinson@cddl.com

Answers to Jeopardy questions will be provided at end of competition for use in studying for CCLS exam.

# Ensure the Timely Filing of Your Civil Case Management Statements

ANNOUNCING FREE  
ELECTRONIC DELIVERY  
OF CIVIL CASE  
MANAGEMENT  
STATEMENTS

*Starting June 1, 2010 the Superior Court in  
Alameda County will accept Civil Case  
Management Statements delivered by email to:*

[EDelivery@alameda.courts.ca.gov](mailto:EDelivery@alameda.courts.ca.gov)

*For more information please visit:*  
[www.alameda.courts.ca.gov/domainweb](http://www.alameda.courts.ca.gov/domainweb)  
Direct Calendar Departments Tab



# Speaker Spotlight

## October Lunch Lesson: “Bankruptcy Procedures,” by Jamie Dreher, Esq.

by *Sophia Albov, CCLS*



The Sacramento Legal Secretaries Association spent an information-packed lunch hour with attorney Jamie Dreher, of Downey Brand. The topic of the day was bankruptcy and Mr. Dreher gave us a quick overview of the policies and procedures that must be followed. One of the highlights of the lecture was the inclusion of some of the local rules of the Eastern District Bankruptcy Court.

As we all know, every court has its own local rules – the same is true in Bankruptcy Court. Mr. Dreher helped clue us in to some of the requirements of the Eastern District Bankruptcy Court (EDBC). For example, there is a requirement that every document filed with the EDBC have a page count located in

the upper left hand corner of the page. This number must be in 18 point font and be bold. Another requirement in the EDBC’s local rules is the use of a Docket Control Number (DC No.) on every motion filed with the court. This number shall appear directly below the case number on all pleading, proofs of service, and other documents which are filed in support or opposition to a motion (Local Rule 9014-1).

Bankruptcy court also has some calendaring rules which differ from the way calendaring is handled for civil proceedings. For example, all days in motion proceedings are calendar days. There is also no required written reply on motions set on a 14 days’ notice, however, motions set

on a 28 days’ notice do require a written reply (Local Rule 9014-1). Anytime one is working with an unfamiliar court, the local rules should be checked to make sure all requirements are met.

Mr. Dreher is a partner in the firms’ Sacramento and Reno offices and he practices Bankruptcy and Commercial Law. He received his J.D. in 2000 from the California Western School of Law in San Diego, California. He has extensive experience representing both creditors and debtors in complex bankruptcy actions.

**“Anytime one is working with an unfamiliar court the local rules should be checked to make sure all requirements are met.”**

*~Sophia Albov, CCLS*

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*Pictured from left to right: Kristi Baughman, Jamie Dreher, Esq., and Sophia Albov, CCLS*

# REMOVING AN ACTION TO FEDERAL COURT

Submitted by Dawn Forgeur, CCLS

*This is not intended to be legal advice. The rules of court should always be consulted.*

Directions for filing a Removal to Federal Court

## Step 1:

### File with the federal court:

1. Notice of Removal (28 U.S.C. § 1446(a).)  
(A copy of all process, pleadings, and orders served on defendant(s) in the action should be attached to the Notice of Removal as an exhibit.)
2. Civil Cover Sheet
3. Check for first appearance fee
4. Any documents required by Local Rules

## Step 2:

### File with the state court that you are removing from:

1. Notice to Adverse Party of Removal (28 U.S.C. § 1446(d).)  
(Attach the filed and endorsed copy of the Notice of Removal from federal court. If filed and endorsed copy is not available REMEMBER to insert the new case number.)
2. REMINDER: Check with the state court to see if that county requires a fee.

## Step 3:

### File with the federal court:

1. Certificate of Service of Notice to Adverse Party of Removal to federal court.

## Step 4:

1. Serve all initial federal court documents.
2. File a proof of service with the federal court showing that you served the initial court documents.

## Step 5:

1. Calendar all federal court dates. Remember that if you have not yet answered the complaint, the answer is due seven calendar days after you file the removal. (Fed. R. Civ. P. 81(c)(2)(C).)
2. Delete all state court dates from the calendar.

## NOVEMBER'S CHARITABLE PROJECT IS BIRTHDAY MAGIC!!!

Birthday MAGIC coordinates personalized birthday parties for children currently living in homeless shelters, transitional living facilities or residential treatment centers in the Sacramento area.

The goal of Birthday MAGIC is to brighten the lives of children by providing fun, meaningful and memorable birthday parties during what can be an awkward and challenging experience in their lives.

Each month, children living in these shelters will celebrate birthdays – through financial support, volunteer help and the Birthday MAGIC Program, these wonderful children will receive a birthday party thrown in their honor.



**WHO:** SLSA is sponsoring Birthday Magic

**WHERE:** Cowell Children's Center  
2820 14th Avenue  
Sacramento, CA 95820

**WHEN:** November 19, 2010 at 4:30 p.m.

SLSA has already sponsored the birthday cake, pizza, decorations, goodie bags, and entertainment. Now we need your help!

### NEEDS

- We need volunteers to help set up for the birthday party, help celebrate and run the birthday party, and clean up.
- We also ask for your help in purchasing presents for the kids

It is recommended that each child gets 5 presents; 2 presents from the "Wants" list, 2 presents from the "Needs" list and one "Surprise" present two weeks prior to the party, we will be told how many kids will be having a birthday in November and we will be given their birthday lists. We then will distribute the lists for the volunteers to view and help purchase gifts.

Please contact Gloriela Garcia at [gloriela.garcia@calegacylaw.com](mailto:gloriela.garcia@calegacylaw.com) if you are interested in joining us, donating, or have further questions.

# Employment Report/Positions Available



by Jaymie Moralez

This free benefit provides the legal community with a place to post job openings for all categories of job positions. SLSA assists in every possible manner to procure employment for members of this association, and cooperates with attorneys in filling positions in law offices, but in no event does this committee act as an employment agency.

Attorneys will need to give the following information to the Employment Chair: name, firm name, address, phone number(s), areas of law practice, software used, position available, years of experience required. The attorney/employer is requested to e-mail the Employment Chair and Webmaster with the advertisement formatted like those currently posted on the "Employment Opportunities" page. Ads are usually posted within 48 hours.

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

Please contact Employment Chair Jaymie Moralez, at (916) 446-7979, or e-mail her at [jmoralez@somachlaw.com](mailto:jmoralez@somachlaw.com). A detailed message can be left, and your call will be returned within 24 hours. If you wish your listing to be placed on our web page, please indicate your authorization to do so.

## Positions Available:

- **(11/3/10) Legal Assistant/Secretary in Mendocino County** Full time position for busy family law attorney in Fort Bragg, beginning January 2011. Minimum 5 years legal secretarial experience required, family law preferable. Medical benefits available. Salary commensurate with experience. Please mail or drop off letter of interest and resume to: Petersen Law Offices, 1102 S. Main Street, Suite 2, Fort Bragg, CA 95437; or email to: [petersen@mcn.org](mailto:petersen@mcn.org), no later than November 24, 2010.
- **(11/3/10) Part-Time Legal Secretary** Solo personal injury firm is seeking an experienced legal secretary to work 25 or more hours per week. We are looking for a self-motivated person who can answer the telephone, open new case files, prepare general correspondence, order medical records and billing statements from medical providers, and independently organize the case files. You must be motivated and able to learn quickly. Qualifications: must be detail oriented, have excellent telephone skills, able to multi-task, computer literate, transcription skills, and ability to work with other staff. Salary will depend on level of experience. To apply, please e-mail resume to [CALitParalegal@aol.com](mailto:CALitParalegal@aol.com).
- **(11/03/10) Litigation Secretary** Seeking an experienced litigation secretary for a solo attorney. Candidate should be organized, detail-oriented, self-motivated, and able to multi-task and work independently. Experience in word processing/transcription, scheduling, calendaring, and proficiency in Abacus, WordPerfect required. Please contact Tim Bonner at (916) 320-5665.
- **(10/8/10) Receptionist** Midsize labor and employment law firm is seeking a hard-working, motivated individual to serve as a receptionist for the attorneys and staff in its Sacramento office. The ideal candidate would be a self-motivated, dynamic person who can take charge of the firm's front desk. Qualifications: Reliable, superior phone etiquette, professional appearance, detail oriented, excellent customer service, able to multitask, computer literate, ability to work collaboratively other staff. Responsibilities: Answering and connecting all incoming calls, greet office visitors and direct them to proper personnel, sort and distribute mail, sign for deliveries and notify proper personnel of deliveries, general upkeep of front office area and other areas in firm, overflow secretarial duties as necessary, other duties as assigned. Salary is commensurate with experience. To apply, please email resume to [info@cookbrown.com](mailto:info@cookbrown.com).



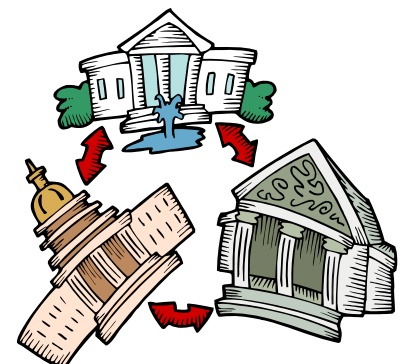
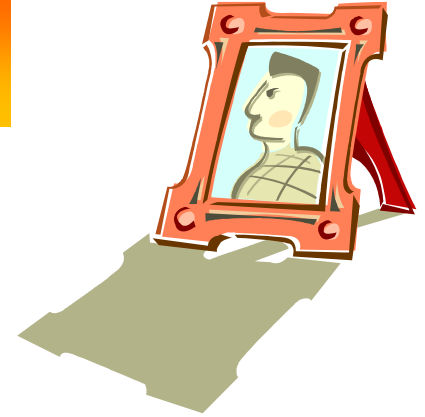
# CCLS Quiz

by Jennifer Estabrook, CCLS

## Bankruptcy

### True or False:

1. Once stapled, the pages of an original Will should not be unstapled for any purpose.
  - True
  - False
2. Once stapled, the pages of an original Will should not be unstapled for any purpose.
  - True
  - False
3. Any person interested in an estate may file a request to receive copies of all inventories, reports or other documents filed in the estate.
  - True
  - False
4. The Probate Code names classes of relatives who have priority over other classes to determine who is entitled to administer the estate when a decedent has left no Will.
  - True
  - False
5. Sixty days' notice is required prior to hearings in connection with the administration of trusts.
  - True
  - False
6. A copy of the original Will is filed with the court along with the Petition for Probate.
  - True
  - False
7. A will is "self-proving" if the witnesses' attestation clause was signed under penalty of perjury.
  - True
  - False
8. Under certain conditions the Probate Code allows certain property to be passed to beneficiaries without a formal probate proceeding.
  - True
  - False
9. Letters testamentary are issued by the court to empower someone to act as administrator of an estate when there is no Will.
  - True
  - False
10. An executor is appointed by the court when no one has been named in the will to administer the estate.
  - True
  - False



*Answers on page 31*

# Speaker Spotlight

## October General Meeting: "The Lifecycle of a Corporation," by Mark Peterson, Esq.

*by Sophia Albov, CCLS*



**Speaker Mark Peterson**

On October 21, 2010, the Sacramento Legal Secretaries Association was honored to share its monthly dinner meeting with Attorney Mark Peterson, of Diepenbrock Harrison. He shared his knowledge of corporation law. In half an hour he was able to lead us through the formation, maintenance, and dissolution of a corporation.

Many businesses do not start out as corporations. Some businesses are never turned into a corporation; they are run a sole proprietorship. As businesses grow and become more complex forming a corporation is desirable, because it protects the owners of the business. The creation of a corporation is the creation of an entity. The corporation can enter into contracts, sue, or be sued.

When a corporation is formed it is important that the parties involved form the right type of business arrangement; incorporating, creating a limited liability company, or forming partnership. The decision for the type of business arrangement is deter-

mined by the long term plans for the business. For example, if a business wants to eventually be traded publically, it is important that it be set up with that in mind from the beginning. It is very difficult and expensive to switch business arrangements midstream. Once the proper business plan is determined a name needs to be registered with the Secretary of State's office.

Mr. Peterson was able to give our group some wonderful insights in how to efficiently and effectively work with the Secretary of State's office. Some people are convinced not to file at the counter because there is an extra fee involved. However, Mr. Peterson gave us startling insight of how long it would take if you do process your documents via the mail, instead of the counter. He indicated that they are four months behind on anything being processed by mail!

We also discussed the various paperwork and requirements that a corporation must submit and meet to stay in business. One aspect of the

life of a corporation that Mr. Peterson highlighted, was the necessity not to pierce the corporate veil. In other words, officers of the corporation cannot mix the corporation's money with their own money, ever! It is also important that any documents signed on behalf of the corporation are clearly signed for the corporation – the signer's title should always be included with name.

There are generally only two ways a corporation can die, merger or dissolution. If one decides to dissolve their corporation they must be very careful to go about it through the proper channels and fulfill all tax requirements.

Mr. Peterson received his J.D. from the University of Michigan in 2006. He has worked with Diepenbrock Harrison as a law clerk, a new attorney, and recently returned to the firm after a sojourn at an international law firm in Dallas. He is a member of the State Bar in California and Texas.



**From left to right: Anne French, Mark Peterson, and Sophia Albov, CCLS**



**Anne French  
Vice President**



**Anne French and new members being sworn in.**



**From left to right: Anne French, Julie Diles, and Christina McKinney**

# Vendor Spotlight

## October General Meeting:

by Astrid Watterson, CCLS



Capitol Legal Investigations was our vendor for our dinner meeting in October. We were thankful to have Luke Patterson and Duncan Runge join us for the evening. Capitol Legal Investigations' mission statement is to deliver professional quality work product and timely service at competitive rates. Luke established his full service licensed private investigations firm in 1995 and has clients whom he serves throughout the Sacramento Valley and Sierra Foothills region. If you are a litigation client, Capitol Legal Investigations can help you with surveillance; video documented and still photog-

raphy evidence; background checks; various records checks; locating witnesses and obtaining witness statements; asset and income searches; process serving; and jury polls. If your area of practice is worker's compensation, Capitol Legal Investigations can help you with surveillance; activities checks; background checks; as well as various investigations for subrogation, employment history, etc. Luke is available to help anyone who needs a private investigator and we were happy to have Luke and Duncan spend some time with us in October. Many thanks to our vendor sponsors!



From left to right: Luke Patterson, Sophia Albov, CCLS, and Duncan Runge

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## PROBATE

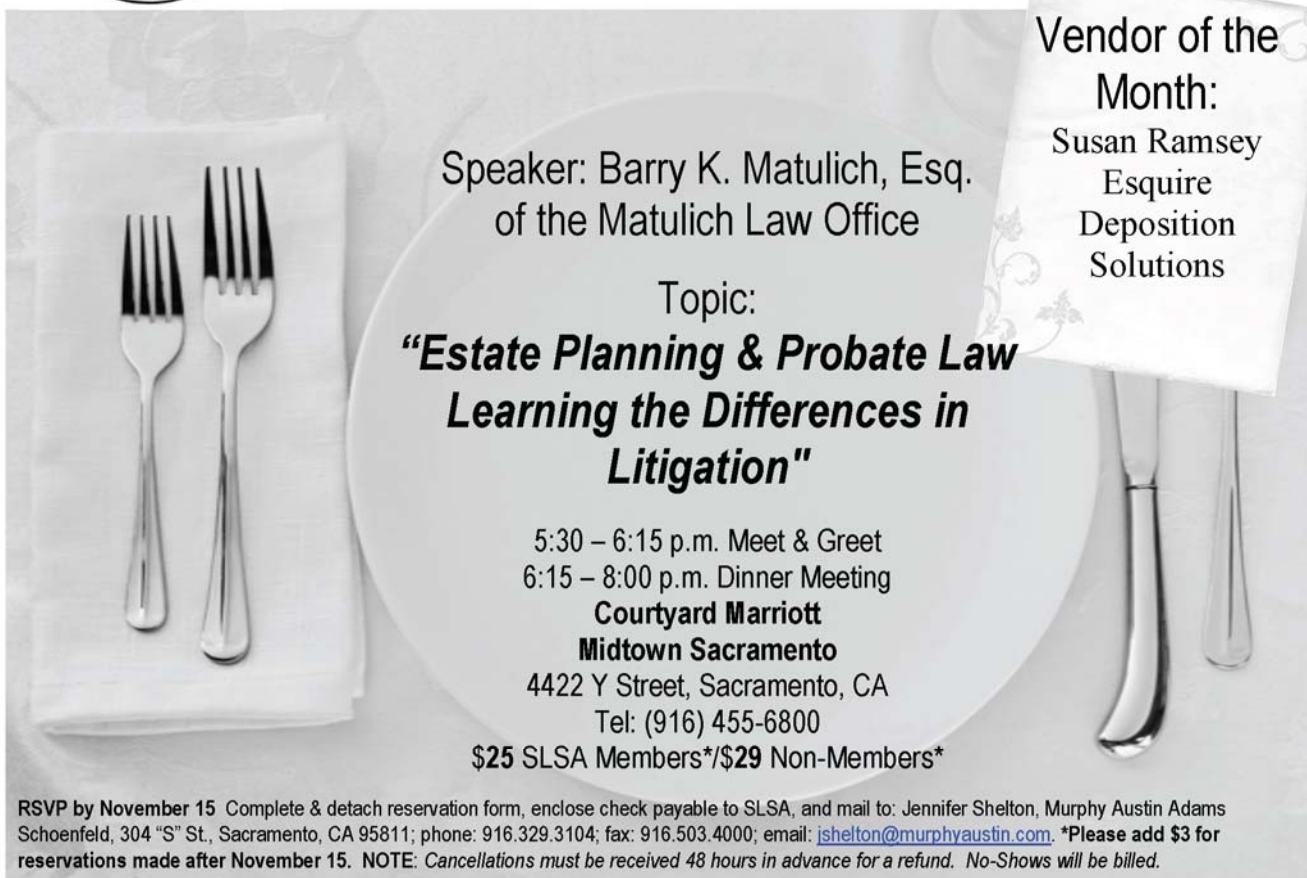
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U J H Y J P N L L X A T M L G  
C O D I C I L B U O E A F X L

ADMINISTRATOR	BEQUEST
CODICIL	DECEDENT
EXECUTOR	HOLOGRAPHIC WILL
INTESTATE	PRETERMIT
TESTATOR	WILL



# Sacramento Legal Secretaries Association

## Dinner Meeting • November 18, 2010



**Vendor of the Month:**  
 Susan Ramsey  
 Esquire  
 Deposition  
 Solutions

Speaker: Barry K. Matulich, Esq.  
 of the Matulich Law Office

Topic:  
**"Estate Planning & Probate Law  
 Learning the Differences in  
 Litigation"**

5:30 – 6:15 p.m. Meet & Greet  
 6:15 – 8:00 p.m. Dinner Meeting  
**Courtyard Marriott  
 Midtown Sacramento**  
 4422 Y Street, Sacramento, CA  
 Tel: (916) 455-6800

**\$25 SLSA Members\*/\$29 Non-Members\***

**RSVP by November 15** Complete & detach reservation form, enclose check payable to SLSA, and mail to: Jennifer Shelton, Murphy Austin Adams Schoenfeld, 304 "S" St., Sacramento, CA 95811; phone: 916.329.3104; fax: 916.503.4000; email: [jshelton@murphyaustin.com](mailto:jshelton@murphyaustin.com). \*Please add \$3 for reservations made after November 15. **NOTE:** Cancellations must be received 48 hours in advance for a refund. No-Shows will be billed.

**MCLE & CCLS Credit:** SLSA, a local association of Legal Secretaries, Inc., an approved provider, certifies that this activity has been approved for minimum Continuing Legal Education credit by the State Bar of California and California Certified Legal Secretary credit in the amount of 0.5 hours.

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

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

**CITY:** \_\_\_\_\_ **STATE:** \_\_\_\_\_ **ZIP:** \_\_\_\_\_

**EMAIL:** \_\_\_\_\_

**TEL:** \_\_\_\_\_ **FAX:** \_\_\_\_\_

**Mexican Buffet**

- Mixed Greens
- Spicy Chicken Tortilla Soup
- Chips And Salsa
- Seasoned Shredded Beef And Chicken Fajitas
- Cheese Enchiladas
- Refried Beans And Mexican Rice
- Shredded Lettuce, Diced Tomato, Cheddar Cheese, Sour Cream And Guacamole
- Gourmet Brownie Bars

Do you require an  MCLE or  CCLS certificate?

Are you an SLSA member?  YES  NO

If "No", are you interested in membership?  YES  NO

Are you interested in hearing about SLSA volunteer opportunities?  YES  NO



# November 2010

## Dates to Remember

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3 <i>Grammar Gregg's Way</i>	4	5	6
7	8 <i>Board Meeting</i>	9	10	11	12 <i>LSI Conference (N. Hollywood)</i>	13 <i>LSI Conference (N. Hollywood)</i>
14 <i>LSI Conference (N. Hollywood)</i>	15 <i>Lunch Lesson</i>	16	17	18 <i>General Meeting</i>	19 <i>Birthday Magic</i>	20
21	22 <i>Bulletin Art Due Advertising Due</i>	23	24	25 <i>Holiday</i>	26 <i>Holiday</i>	27
29	29	30				

- **November 3 - Grammar Gregg's Way**  
*(Location: Fagen Friedman & Fulfroost, LLP - Time: 5:45 p.m.)*
- **November 8 - SLSA Board Meeting**  
*(Location: Somach Simmons & Dunn - Time: 5:30 p.m.)*
- **November 12-13—LSI Conference (N. Hollywood)**  
*(Location: Beverly Hills Garland Holiday Inn)*
- **November 15- SLSA Lunch Lesson**  
*(Location: Downey Brand - Topic: What Could Go Wrong? - Estate Planning & Probate)*
- **November 18 - SLSA Dinner Meeting**  
*(Location: Courtyard Marriott Midtown - Topic: Litigation differences in Estate Planning & Probate Law - Time: 6:16-8 p.m.)*
- **November 19 - Birthday Magic**  
*(Location: Cowell Children's Center - Time: 4:30 p.m.)*
- **November 22 - Last Day to Submit Articles for the November issue of The Legal Eagle**
- **December 3 - Grammar Gregg's Way**  
*(Location: Fagen Friedman & Fulfroost, LLP - Time: 5:45 p.m.)*
- **December 6 - SLSA Board Meeting**  
*(Location: Somach Simmons & Dunn - Time: 5:30 p.m.)*
- **December 13- SLSA Lunch Lesson**  
*(Location: Downey Brand - Topic: TBD)*
- **December 16 - Mock Trial**  
*(Location: Marriott Hotel - Time: 5:30-8:00 p.m.)*
- **December 20- Last Day to Submit Articles for the November issue of The Legal Eagle**





# Vocabulary List

*by Jennifer Estabrook, CCLS*

## PROBATE

- Administrator                      the person appointed by the court to act as a probate estate’s representative when the decedent leaves no Will
- Attestation Clause                The clause at the end of a formal Will or codicil where the witnesses “witness” or “attest to” the signing of the Will or codicil by the maker or testator
- Beneficiary                         One who receives property from an estate, whether an heir or not
- Bequest                              A gift of personal property by Will
- Codicil                                A supplement to a Will, which may explain, modify, add to, subtract from, qualify, alter, restrain or revoke provisions of the original Will
- Devise                                 A gift of real property by Will
- Decedent                             Person who has died
- Executor                             The person named in a Will to carry out the directions in the Will and to act as the representative of a decedent’s estate
- Holographic Will                 A Will in which the material provisions and signature are in the handwriting of the testator
- Intestate                             One who dies without a valid Will
- Letters of Administration        A document issued by a court empowering one to act as administrator of a decedent’s estate
- Letters Testamentary             Document issued by a court empowering one designated in a decedent’s will to act as executor of the decedent’s estate
- Pretermitted                        In a Will, to let pass without mention or notice, or to omit
- Testator                                The person who makes a Will
- Will                                      Document signed by a testator by which, among other things, the testator disposes of his/her estate.

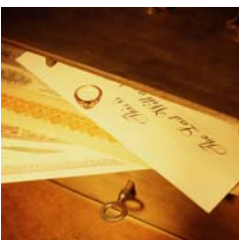
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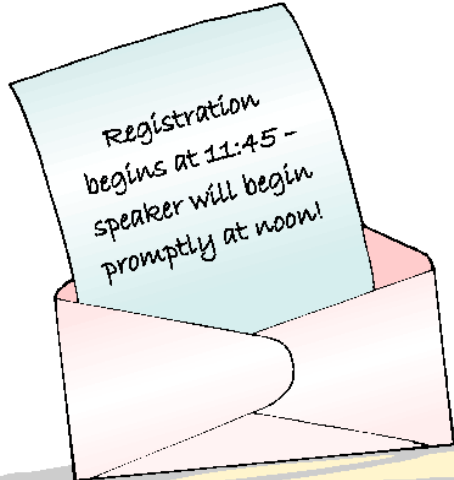
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# Sacramento Legal Secretaries Association

## LUNCH LESSON



**Date:** November 15, 2010  
**Time:** 12-1 p.m.  
**Location:** Downey Brand  
 621 Capitol Mall, 18th Floor  
 Sacramento, CA 95814  
*Lunch will be provided. Public parking is available in the building for a fee.*  
**Cost:** \$15 LSI Members, \$17 Non-LSI Members

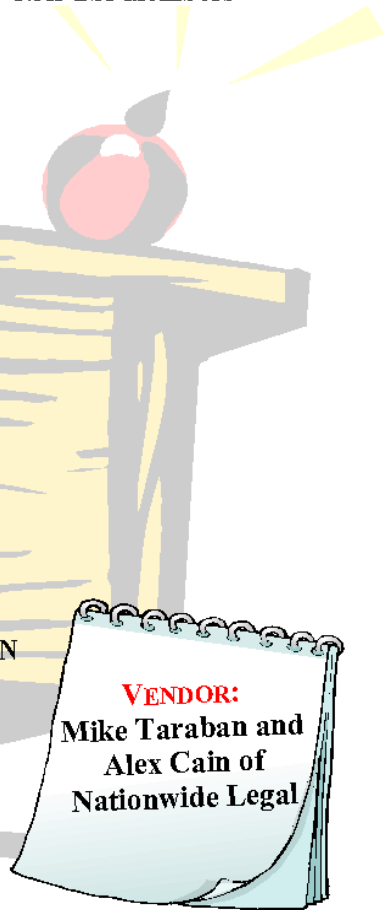
### TOPIC:

**WHAT COULD GO WRONG?  
 ESTATE PLANNING/PROBATE**

### SPEAKERS:

**DOUGLAS ALLISTON, ESQ. AND  
 NERISHA SOODEEHUL, ESQ.  
 OF  
 MURPHY CAMPBELL GUTHRIE & ALLISTON**

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Name: \_\_\_\_\_  
 Firm: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_  
 Daytime Phone: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 SLSA Member?  YES  NO  
 CCLS Certificate?  YES  NO  
 Are you a member of another LSI Association? \_\_\_\_\_

**Make Checks Payable to: SLSA**  
**Reservations due by 11/11/10**

To: Sophia Albov, CCLS  
 Cook Brown LLP  
 555 Capitol Mall, Suite 425  
 Sacramento, CA 95814  
 Tel: 916-626-1349  
 email: salbov@cookbrown.com

*If you cannot attend this event but are interested in membership, please call 916-446-4254.  
 Visit our website: <http://www.slsa.org>*



# Governor's Report

by Dawn Forgeur, CCLS



## What does a Governor do?

Well SLSA members, we are about halfway through the year and I thought that I would describe for you what a Governor does for its local association. First and foremost, I act as a representative of SLSA at the state level, attending all meetings of LSI conferences. Before these meetings, LSI sends any pertinent information to the local associations and it's my job to let the Board and the membership know about this information and if there are any items that will be voted on at the next LSI conference. This can include, but is not limited to, bylaw amendments, conference bids, nominations and elections. During these quarterly meetings, an agenda is circulated and it's my job to check with our President to see if she has any questions about the agenda that I need to ask for her. Of course, if I have any questions or need clarification, I can ask those also.

After attending conference, I write a report to let the mem-

bers know what happened during these business meetings. I also make an oral report at the following dinner meeting, which is usually a condensed version of my written report.

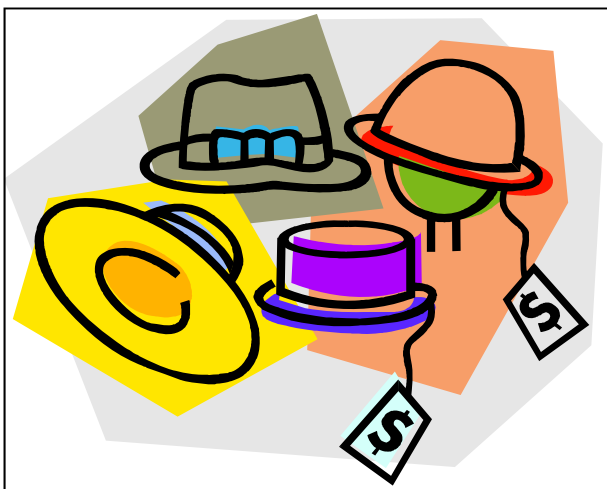
Another aspect of being the Governor is being the liaison between the local chairmen and the state level chairmen. Part of that is making sure that the directives get distributed to the SLSA chairmen and following up with those chairmen to make sure responses get back to LSI. This is important because 1) SLSA gets Chapter Achievement Points for responding by the deadline, and 2) the LSI chairmen need these responses to create their reports. The resulting reports are then my job to distribute them back to our chairmen for use. These reports can help our local chairmen do their jobs easier, or give them ideas to better achieve their goals.

I also keep track of SLSA's Chapter Achievement Points. Every time a member attends a seminar, a dinner meeting, or

rents a car using LSI's discount code, if you let me know about it, then I keep a record of it. This is because SLSA competes with the other local associations to win the Chapter Achievement Point contest! (Hint – there's a list every month in this Bulletin that lists some of the activities that earn points!)

Finally, I help our President and the rest of the Board where needed with events, members, articles, and meetings. I am halfway through my first year as Governor and it has been great. I am getting the chance to learn what is involved in keeping SLSA going, how important the volunteers are in putting together great educational programs, and giving back to the community with projects like Birthday Magic. It has been awesome to see others in the legal field who are involved in the association, working to increase their knowledge, and helping others in our field increase their knowledge.

"Coming together is a beginning. Keeping together is progress. Working together is success."  
~Henry Ford



## Capturing CAPs (Chapter Achievement Points)

Did you know that SLSA members can earn the association 25 points each time you attend a lunch lesson or evening seminar? Yes, that's 25 points per member, per event. Help us capture our points. Have you attended a lunch lesson or evening seminar lately? If so, let Dawn Forgeur, CCLS know, so she can add your points to the list. Have you attended a seminar or workshop sponsored by a Forum such as the Bay Area Legal Secretaries Forum? If you have, that's another 25 points! If you have attended a seminar or workshop sponsored by another local association, that's another 25 points too! Let Dawn know if you have done any of these items so that we can capture our CAPs.

E-mail Dawn at [forgeurd@gtlaw.com](mailto:forgeurd@gtlaw.com)

CHAPTER ACHIEVEMENT REPORTING FORM

Each Association in LSI participates every year in the Chapter Achievement Contest. Associations are grouped in categories depending upon the Association's membership (Group A: 5-30; B: 31-50; C: 51-75; D: 76-95; and E: over 95). Five awards of \$250 each are presented by Stuart F. Cooper Co. to the highest scoring Association in each of the above categories at the Annual Conference of LSI. Chapter Achievement points are tracked during the year by the Association's Governor. The Chapter Achievement Report covers activities from April 1, 2010 through March 31, 2011. This form's purpose is to track each member's activity during the course of the fiscal year. Please complete the form each time you attend a function and mail it to the person named below. 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. If you are an SLSA officer or committee chair, PLEASE take particular note to the last item below. Thank you.

- Month/Year Function
I submitted a potential advertiser to the Editor of The Legal Secretary magazine. (25 points per advertiser)
I submitted an article to The Legal Secretary magazine. (50 points per article)
I attended an LSI Quarterly Conference and/or Annual Conference. (50 points)
I attended an Officer/Chairman Workshop at the LSI Annual Conference. How many? \_\_\_ (25 points)
I attended the President's Roundtable at the LSI Annual Conference. (25 points)
I belong to an LSI-sponsored credit union. (100 points)
I am insured through an LSI plan. (100 points)
I rented a car through Hertz and received the LSI discount. (200 points per rental)
I enrolled in an LSI-approved retirement planning program. (100 points)
I sponsored a CCLS study group. (200 points)
I participated in a CCLS study group. (25 points)
I conducted a CCLS Mock exam. (150 points)
I took the CCLS exam. (Test date: \_\_\_\_\_) (100 points)
I passed the CCLS exam. (Test date: \_\_\_\_\_) (200 points)
I submitted questions to the Continuing Education Council for use on the CCLS Mock exam. How many? \_\_\_ (25 points)
I recertified as a CCLS during the 2010-2011 fiscal year. (50 points)
I gave a presentation on legal secretarial careers at a local educational institution. (50 points per presentation)
I attended another Association's monthly meeting, installation, or other function. (50 points per event)
I taught an educational workshop or seminar. (75 points per event)
I attended an educational workshop or seminar sponsored by SLSA or another local association. (25 points per event)
I attended an educational workshop or seminar sponsored by a Forum, CEB or The Rutter Group. (25 points per event)
I conducted a short session on legal procedures at an SLSA dinner meeting. (25 points per meeting)
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, 2011. (100 points)
I attended a Legal Specialization Section Seminar at Quarterly or Annual Conference. How many? \_\_\_ (50 points per meeting)
I attended a Legal Specialization Section Regional Seminar. (75 points)
I submitted an article for use in a Legal Specialization Section newsletter. (50 points)
I submitted an article to LSI Director of Public Relations for publication in the Daily Journal. (50 points per article)
I gave a formal presentation on benefits of membership to a law office. (50 points per presentation)
I gave a formal presentation on benefits of membership to the local bar association. (100 points per presentation)
I purchased the LSI Legal Professional's Handbook between April 1, 2010 and March 31, 2011. (200 points)
I purchased updates to the LSI Legal Professional's Handbook between April 1, 2010 and March 31, 2011. (100 points)
I purchased the Law Office Procedures Manual between April 1, 2010 and March 31, 2011. (200 points)
I purchased updates to the Law Office Procedures Manual between April 1, 2010 and March 31, 2011. (100 points)
I am an SLSA officer or committee chair. I timely responded to my LSI counterpart's quarterly directive(s). Attached is (are) a copy (copies) of my response(s). (20 points per directive)

Name: \_\_\_\_\_ Phone: \_\_\_\_\_
Street Address: \_\_\_\_\_
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Please attach additional pages if necessary. Thank you for your assistance. If you have any questions, you can reach Dawn Forgeur, CCLS at (916) 442-1111; or e-mail at forgeurd@gtlaw.com. Otherwise mail to:

Dawn Forgeur, CCLS
SLSA Governor 2010-2011
Greenberg Traurig
1201 K Street
Sacramento, CA 95814

# Speaker Spotlight

## September Evening Program: Basic Summation Training, with Ron Bodenmann

by Sophia Albov, CCLS



From left to right: Crystal Rivera and Ron Bodenmann

On Tuesday, October 26, the Sacramento Legal Secretaries Association (SLSA) had the pleasure of hosting one of its own for an exciting education seminar. Ron Bodenmann of Capitol Digital joined us to discuss the ins and outs of Summation litigation software.

aging the often complex and voluminous patchwork of information and eDiscovery straightforward and more accessible.”

Mr. Bodenmann gave us a dynamic and interactive look at how to use this computer software to our advantage.

detailed all the keystroke shortcuts in CT Summation iBlaze; it was also broken down by category (i.e. transcript view, database view). There was also take-home information which detailed the best ways to search in the program and a glossary of terms which are used. Last,

**“Summation is comprised of a suite of programs which aide legal professionals in data management and organization.”**

Summation is comprised of a suite of programs which aide legal professionals in data management and organization. As the company Access Data describes on its website:

“With so much disparate and fragmented information revolving around so many cases, key evidence can slip through the cracks leaving you and your clients vulnerable. Our solutions make man-

Using real life examples from the actual computer program he took us through the basic functions and showed us how all the programs can work together to aid in the process of case development and tracking.

The participants were also lucky enough to receive some very helpful handouts. Not only did Mr. Bodenmann enlighten us with a sheet that

but not least, we were given an “at a glance” breakdown of the different features each edition of iBlaze includes.

Ron Bodenmann, in addition to being an active member of SLSA, is the Director of Sales and Technology at Capitol Digital Document Solutions. He is also a certified Summation trainer.



# Legal Procedures

by Laura Welch, CCLS, Nancy Vanderhorst, CCLS, and Molly Mahoney

## Probate - Duties of a Legal Secretary

Working in the area of probate and estate planning can be challenging and fun. According to the *Law Office Procedures Manual (LOPM)*, written by Legal Secretaries, Inc., and published by The Rutter Group, accuracy in typing and transcription of estate planning documents is essential. There are numerous timelines and procedures to follow in a probate proceeding. The attached flowchart from the *Law Office Procedures Manual* is a helpful reference for procedures on probate.



**PROBATE PROCEEDING**

<u>Title of Document</u>	<u>Deadline</u>	<u>Probate Code Section</u>
File Original Will (and any codicils)	Within 30 days of having knowledge of death of testator	§ 8200
File Petition for Probate of Will and for Letters Testamentary/ Administration; Notice of Petition to Administer Estate; Duties and Liabilities	Original Will/Codicil must be submitted with Petition; clerk will set for hearing within 30 days as court calendar allows	§ 8000; 8100; 8404
Mail Notice of Petition to Administer Estate	15 days' notice	§ 8110
Publish Notice of Petition to Administer Estate (publish 3 times)	First publication at least 15 days before hearing (with 5 days between first and last publication)	§ 8121
File Proof of Publication	Sufficient time before hearing date as required by local preferences	§ 8124
File Proof of Subscribing Witness or Proof of Holographic Will (not required if Will/Codicil are self proving)	Sufficient time before hearing date as required by local preferences	§ 8220
	*****	
Prepare Order for Probate and Letters Testamentary/ Administration	Submit to court sufficient time before hearing date as required by local preferences	§ 8400-8405
Bond (if required)	Have ready for hearing date	§ 8480-8488
Secure certified copies of Letters	Letters will not be issued until bond is filed (if required)	§ 8480
	*****	
Prepare and mail Notice of Administration to each known creditor of decedent	As determined by attorney	§ 9050-9054

<u>Title of Document</u>	<u>Deadline</u>	<u>Probate Code Section</u>
File Notice of Allowance or Rejection of Creditor's Claim for each Creditor's Claim received	Court approval not required if representative has authority under Independent Administration of Estates Act unless claim is submitted by personal representative	§ 9250 et seq.
Notice to California Director of Health Services/Notice to Director of Victim Compensation and Government Claims Board	Not later than 90 days after issuance of Letters	§ 9202
Prepare and file Inventory and Appraisal	Within 4 months after issuance of Letters	§ 8800 et seq.
Prepare and file Change in Ownership Statement-Death of Real Property Owner	File with county recorder or assessor in each county where decedent owned real property	§ 8800
Prepare and file Property Tax Certification (included on Inventory and Appraisal form)	File with Inventory and Appraisal when all Death of Real Property Owner – Change in Ownership Statements have been filed	§ 8800
Prepare and file Tax Returns as necessary		
A. Estate tax (federal and state)	Within 9 months of date of death (an extension can be applied for – only up to 6 months)	
B. Individual income tax returns	By April 15 of year following date of death (an extension can be applied for – only up to 6 months). Last day to file a qualified disclaimer	Int. Rev. Code, § 2518
C. Fiduciary tax return (federal and state)	Reporting period cannot extend more than 12 months from date of death	



<u>Title of Document</u>	<u>Deadline</u>	<u>Probate Code Section</u>
File Account and Report and Petition for Distribution of Estate and Notice of Hearing	At any time following 4 month creditor claim period or 1 year after issuance of Letters if no federal estate tax return required, and within 18 months if federal estate tax return required	§ 12200
Waiver of Account	If applicable	§ 10954
Mail Notice of Hearing of Petition for Distribution	15 days' notice <b>NOTE:</b> If the matter involves the administration of a trust, 30 days' notice of a hearing is required.	§ 11604.d § 17200, et seq.
Prepare Order or Judgment	Submit to court in sufficient time before hearing as required by local preferences	
Record Order in all counties where real property of decedent was located		§11751
Transfer assets as set forth in Order		
Prepare and file Receipts for distributees	Distributees should sign upon receipt of assets	§ 11751; 11753
Prepare and file Declaration for Final Discharge and Order and send copy to bonding agency (if necessary)		§ 12250



# Law Office Products/ Management

by *Andrea Savig, CCLS*

## QuickBooks Assisted

Payroll is one of our office's least favorite jobs. The hardest part is dealing with the payroll taxes that are due each quarter. The IRS is constantly changing their tax tables and it is our responsibility to keep them straight. Therefore, our office decided about a year and a half ago to switch from QuickBooks to a large payroll company that would pay the taxes automatically. In the beginning, it seemed like a smart move simply for the peace of mind. In the end, the large payroll company was expensive and the amount of time spent reviewing the reports and entering them became a full-time job.

QuickBooks has been the program that our office has used for years. It has really worked well for us. The only area that didn't work for my boss was making sure the amounts for quarterly taxes were accurate. As we all know, if it is not correct, the IRS will fine you. We also realized quickly that the amount of money spent to outsource was not justified. For example, QuickBooks automatically updates all reports and summaries each time a check is written. With the payroll company we had to manually enter each report and make sure the correct amount was entered. Not only were we paying the company to prepare the reports, we were also paying an employee to enter them. Another reason we switched was to save time. Unfortunately, the company we hired did not save us any time. There were

times when the report didn't match or a wrong amount was pulled from our account and we did not know why. It just seemed like when something went wrong it took hours to fix. We all know that if an issue does arise, it happens at 5:00 p.m. on a Friday evening and of course, they are closed.

**"QuickBooks Assisted, gives us piece of mind that our quarterly taxes will be done correct and on time, avoiding those unnecessary penalties." ~ Andrea Savig, CCLS**

So the "convenience" of having them at your fingertips wasn't there.

After doing research, we found that Intuit QuickBooks offered different services. One of the services they offered was Intuit QuickBooks Payroll Assisted. This service performs the same tasks our payroll company did but at a fraction of the price. The price is roughly \$69.00 a month, plus \$1.00 per employee per payroll, and \$2.25 per employee for direct deposit per payroll. The price may seem expensive to some, but for us, it was much more cost effective. The great thing about this service is that everything is done online and is linked to our QuickBooks program. They also guarantee that the tax deposits and filings will be done accurately and on-time or they will pay the penalties. For convenience the taxes are directly withdrawn from our bank account and we no longer have to take unnecessary trips to the

bank to ensure that the taxes are paid on time.

In the pursuit of efficiency, our office took two steps backwards. The payroll company we hired really didn't make sense for our office. They were expensive and didn't give us much more than we already

had with QuickBooks. We felt they over promised and under performed. With that in mind, QuickBooks Assisted was a better fit for our company. It gives us the piece of mind that our quarterly taxes will be done correct and on time, avoiding those unnecessary penalties.

However, we are a smaller office. Let it be known, that this type of service may be valuable and cost effective for a larger office.



*"If it is not correct, the IRS will fine you."*

*~ Andrea Savig, CCLS*





*Mark Your Calendars and Join Us for the  
Sacramento Legal Secretaries Association's Annual*

# **MOCK TRIAL EVENT!**



*December 16, 2010*

*5:30 - 8:00 PM*

*The Marriott Hotel*

*4422 Y Street, Sacramento*

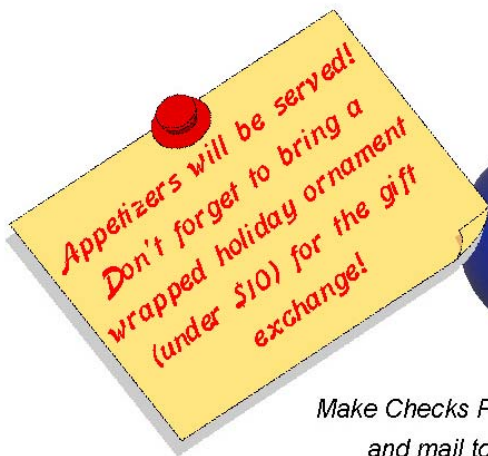
*All This Fun for Just \$15!!*

*RSVP by December 10, 2010 to Rosa Deniz  
(916) 501-4907 or rdeniz@pacific.edu*

## **"The Great Pumpkin v. The Major Television Networks and Their Affiliates"**

**A Question of Equal Time or Equal Opportunity**

*written by John Baldwin*



Volunteer Roles to be Filled:

- |                     |             |
|---------------------|-------------|
| Bailiff             | Judge       |
| Plaintiff's Counsel | Court Clerk |
| Defense Counsel     | Bernard     |
| The Great Pumpkin   | Murdoch     |
| The Easter Bunny    | Jurors (6)  |

Please contact Rebecca Lerma  
if you are interested in participating in this  
fun-filled event!

[lemar@gtlaw.com](mailto:lemar@gtlaw.com)

*Make Checks Payable to: SLSA  
and mail to Rosa Deniz  
c/o IAJ, McGeorge School of Law  
3455 Fifth Avenue, Sacramento, CA 95817*





Thank You



Sacramento Legal Secretaries Association participated in Fairytale Town's annual Safe & Super Halloween event. This year's theme was "Monster Mash" and SLSA was in charge of King Arthur's castle as "Dracula's Lair." Our association has participated in this event for a few years now and it's a great opportunity to give a little back to the community. We are responsible for providing candy for all of the kids who attend as well as entertaining the little ones with arts and crafts. SLSA members who volunteer for this event usually arrive in costume according to our theme. This year, Jennifer Estabrook, CCLS and Ron Bodenmann put the event together. They did a fantastic job! Many of SLSA's successes are attributed to a great team and this event was no exception.

Thank you to members who donated items for this event. They were:

Paula Lee  
Klinedinst

Maimie Chyinski  
Fagen Friedman & Fulfrost

Crystal Rivera  
Astrid Watterson, CCLS  
Somach Simmons & Dunn

Wendy Lannoye  
Atkinson Baker, Inc.

Ron Bodenmann  
Capitol Digital



Thank you to members and their families who donated their time to hand out candy and help the kids with the various arts and crafts. They were:

Ron & Bridget Bodenmann and their children Jillian and Ethan

Jennifer & Steve Estabrook

Corrin Farrell

Dawn & Randy Forgeur

Anne French and her son Jake

Crystal Rivera

Jennifer & Jon Rotz and their daughter Katelyn

Astrid Watterson, her daughters Alexis & Emily, and family friend Holly

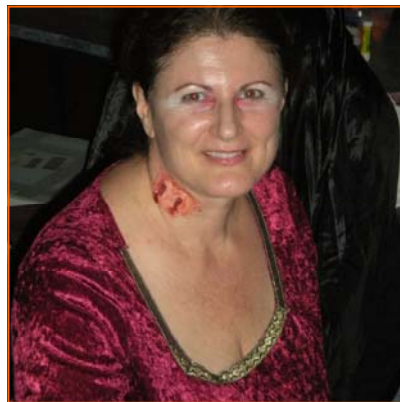
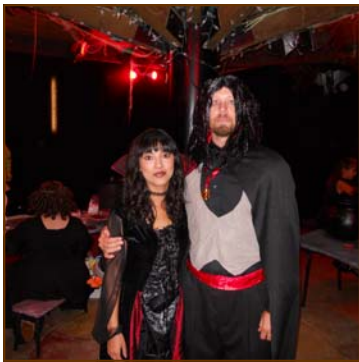
Dawn Willis and her son Jake



M  
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R



Mash



*Fairytale Town  
October 2010*



**SUPERIOR COURT OF CALIFORNIA  
COUNTY OF SACRAMENTO**

**NOTICE OF FEE CHANGES  
Effective November 1, 2010**

As a result of the enactment of Senate Bill 857, various civil filing fees and criminal fees have been established or increased. The Sacramento Superior Court will be establishing/increasing the below noted fees on November 1, 2010. All new and increased fees sunset on July 1, 2013, except as noted below. The additional revenue from these fee changes will be used to offset reductions to trial court funding.

New fee

- \$500 renewal fee for application to appear as counsel pro hac vice for each year a case continues.

Increased Fees

- \$40 increase to first paper filing fees for unlimited and limited civil cases where the amount in controversy is more than \$10,000.
- \$20 increase to first paper filing fees for limited civil cases where the amount in controversy is \$10,000 or less.
- \$40 increase to first paper filing fees for family law cases.
- \$40 increase to filing fees for probate first papers, petitions, objections, oppositions, subsequent papers, and conservator appointments.
- \$20 increase to first paper filing fees for petitions for guardianship of a person only.
- \$20 increase to first paper filing fees for petitions to establish fact of birth, death or marriage.
- \$300 increase to the summary judgment motion fee.
- \$250 increase to the pro hac vice fee.
- \$40 increase to appeal filing fees for limited civil cases.
- \$40 increase to writ petition filing fees for limited civil cases.
- \$40 increase to appeal filing fees for labor commissioner decisions.
- \$20 increase to amend complaint or cross complaint for limited civil case to change the amount at issue.
- \$40 increase to amend complaint or cross complaint for limited civil filed by assignee to change the amount at issue.
- \$10 increase to the security fee (sunset on July 1, 2011).

A revised statewide civil fee schedule will be posted to the California Courts Web site at [www.courtinfo.ca.gov/reference/feeschedule.htm](http://www.courtinfo.ca.gov/reference/feeschedule.htm) and will also be available the clerk's office. A schedule of the criminal and traffic fees, assessments and penalties can also be obtained at the clerk's office.

# CCLS Quiz Answers

by Jennifer Estabrook, CCLS

**ANSWERS:**

1. True; LOPM J(I)
2. False; LOPM J(II)(D)(1)
3. True; LOPM J(II)(D)(4)
4. True; LOPM J(II)(F)
5. False; LOPM J(I)(J)
6. False; LOPM J(II)(c)
7. True; LOPM J(II)(B)(3)
8. True; LOPM J(II)(I)
9. False; LOPM glossary
10. False; LOPM glossary



## Legal Specialization Sections

Have you considered becoming a member of the Legal Specialization Sections? Legal Secretaries, Inc. offers specialization sections to legal professionals in the areas of: criminal law, family law, law office administration, litigation, probate/estate planning, and transactional law. While SLISA's monthly bulletin and LSP's quarterly magazine can offer you information on legal procedure, a specialization section can offer you more in depth information about a specific practice.

The specialization sections each have an LSI leader that is in charge of providing members with their own newsletter as well as an informational speaker at each conference. Membership in a legal specialization section costs \$20 for each section or a total fee of \$75 for all six sections for the entire year. If you are a member of a section and you wish to attend that section's seminar at conference, your admission is free. That's a great deal for continuing education credits!



Did you know that if you become a member of a legal specialization section, you can also earn chapter achievement points for your association? Not only are you learning something new, staying on top of legal news for your particular field, but you are also helping your association earn those coveted chapter achievement points! Think about it, attorneys are also members of certain specialization sections, why not legal professionals like ourselves?

For an annual price of \$20 for one particular section you can increase your knowledge and help your association. A copy of the registration application can be found in the bulletin or on LSP's website at [www.lsi.org](http://www.lsi.org).

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# Out to Lunch: Great Lunch Spots & Happening Happy Hour Places

by *Sophia Albov, CCLS*

### Mr. Pickle's Sandwich Shop

1050 20th Street, Suite 120  
Sacramento, CA 96811  
(916) 442-0900  
www.mrpicklesmidtown.com

### Hours of Operation

Current Hours (Disclaimer – these are “summer hours” please check back often as they will be switching to winter hours)  
Mon – Wed: 10AM - 7PM  
Thurs - Sat: 10AM - 9PM

True story, a sandwich shop with Happy Hour! If you want a decadent and amazing sandwich this is the place to go. Their sandwiches are so big that you could have one half for lunch and one half for dinner, but I always stuff myself silly on the first go a round! (I mean a sandwich with dressing doesn't ever taste as good after it has been in the fridge.)

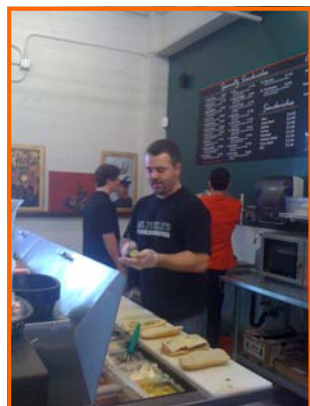
Mr. Pickle's was once a destination when visiting the suburbs of Sacramento. I remember in college venturing to the wilderness know as Carmichael to indulge in some Mr. Pickle's madness. However, in the last few years Mr. Pickle's has been springing up around Midtown and East Sacramento. We are so lucky that this sandwich institution has joined the dining options on the grid.

The staff at Mr. Pickle's is always friendly! They are sometimes very slow, but always friendly. I would not go expecting to get in and out in five minutes. The construction of a great sandwich is apparently something that cannot be rushed. Maybe it does take half my lunch hour to get the food, but I will not take the other half to eat it! I personally feel that it is worth the wait.

I am a creature of habit and I always get the Veri Vegi (not Gregg approved spelling, but very cute!) sans cucumber. I also like to modify “everything” which is the pre-determined assortment of sauces and veggies that they put on every sandwich. Unless you specify otherwise, every sandwich comes with mayonnaise, mustard, garlic sauce, lettuce, tomato, pickles, pepperoncinis, and onions. My

personal favorite is to skip the mayo, mustard, and garlic sauce and substitute for ranch dressing...yum! If your dining needs call for a sandwich of greater substance, Mr. Pickle's offers a wide selection of high quality deli meats and cheeses, vegetables, condiments and sliced and San Francisco-style rolls.

Parking in the area can be a challenge as they are located in between J and K on 20th Street. However, if a little walk does not bother you then there is ample parking on the other side of J. I would also suggest coming for either an early or a late lunch, do not attempt to come here at high noon!



## Happy Hour Specials:

Happy Hour - EVERY Weekday!!  
Monday to Friday from 4 to 7 PM

- All Sandwiches \$5.00 (Really? Yep!)
- o Pitchers \$10.00
- o All Drafts \$3.00
- o Pabst all 24oz only \$2.25 pitchers





# Happy “November” Birthdays!!



<i>Kathy Montgomery</i>	<i>November 1</i>
<i>Jaymie Morales</i>	<i>November 1</i>
<i>Christina McKinney</i>	<i>November 3</i>
<i>Janice Ainsworth</i>	<i>November 6</i>
<i>Deborah K. Brazell</i>	<i>November 7</i>
<i>Angela Knight</i>	<i>November 14</i>
<i>Susan Lee</i>	<i>November 15</i>
<i>Grace Barner</i>	<i>November 17</i>
<i>Charlotte Spink, CCLS</i>	<i>November 22</i>
<i>Joani (Nicholson) Burris</i>	<i>November 24</i>
<i>Andy Gilbert</i>	<i>November 26</i>
<i>Patricia Bernard</i>	<i>November 27</i>
<i>Emily Roldan</i>	<i>November 27</i>
<i>Andrea L. Savig, CCLS</i>	<i>November 29</i>



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

COMPLETE AND DELIVER THE ORIGINAL APPLICATION, WITH CHECK PAYABLE TO SLSA, FOR \$40 (\$25 FOR STUDENTS) WHICH INCLUDES LOCAL DUES, ANY INITIATION FEE, AND LEGAL SECRETARIES, INCORPORATED (LSI)\* PER CAPITA TAX, TO:

**Anne French  
Downey Brand  
621 Capitol Mall, 18<sup>th</sup> Floor  
Sacramento, CA 95814**

NAME OF APPLICANT \_\_\_\_\_  
EMPLOYER \_\_\_\_\_ POSITION \_\_\_\_\_  
MAILING ADDRESS \_\_\_\_\_ CITY/ZIP \_\_\_\_\_  
BUSINESS TELEPHONE (\_\_\_\_) \_\_\_\_\_ RESIDENCE TELEPHONE (\_\_\_\_) \_\_\_\_\_  
BUSINESS E-MAIL \_\_\_\_\_ 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 \_\_\_\_\_ APPLICATION APPROVED \_\_\_\_\_

**~ ~ LSI LEGAL SPECIALIZATION SECTIONS MEMBERSHIP ~ ~**

LSI MEMBERS MAY ALSO JOIN ONE OR MORE OF THE FOLLOWING LSI LEGAL SPECIALIZATION SECTIONS:

- ~ CIVIL LITIGATION
- ~ CRIMINAL LAW
- ~ FAMILY LAW
- ~ LAW OFFICE ADMINISTRATION
- ~ PROBATE/ESTATE PLANNING
- ~ TRANSACTIONAL LAW

SPECIALIZATION SECTION MEMBERSHIP INCLUDES: (1) QUARTERLY SECTION NEWSLETTERS; (2) FREE QUARTERLY CONFERENCE WORKSHOPS; (3) REDUCED REGISTRATION FEES FOR REGIONAL SPECIALIZATION SECTIONS SEMINARS; AND, (4) ROSTER LISTING EACH SECTION MEMBER'S NAME, CONTACT INFORMATION, EXPERTISE AND GEOGRAPHICAL AREA WITH WHICH FAMILIAR. SECTION DUES ARE NOMINAL AND A DISCOUNT IS OFFERED FOR MEMBERSHIP IN ALL SIX SECTIONS.

**FOR LSI LEGAL SPECIALIZATION SECTIONS MEMBERSHIP AND DUES INFORMATION, VISIT LSI'S WEBSITE AT [www.lsi.org](http://www.lsi.org); or, TRANSMIT A COPY OF THIS ENTIRE PAGE OF YOUR APPLICATION TO:**

LEGAL SPECIALIZATION SECTIONS COORDINATOR  
LSI CORPORATE OFFICE  
P.O. BOX 660  
FORTUNA, CA 95540-0660  
FACSIMILE: 707.725.1344 E-MAIL: [lsiorg@suddenlinkmail.com](mailto:lsiorg@suddenlinkmail.com)

(Form adopted 5/01; revised 5/08)

\* ACCOMPANYING MEMBERSHIP IN LEGAL SECRETARIES, INCORPORATED, A CALIFORNIA NON-PROFIT MUTUAL BENEFIT ASSOCIATION, INCLUDES SUBSCRIPTION TO THE LEGAL SECRETARY MAGAZINE, REDUCED ANNUAL DUES FOR MEMBERSHIP IN LEGAL SPECIALIZATION SECTIONS AND DISCOUNTED PRICES ON PURCHASE OF LSI LEGAL PROFESSIONAL'S HANDBOOK AND LAW OFFICE PROCEDURES MANUAL.

SLSA and LSI MEMBERSHIP APPLICATION (continued)

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

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

WHERE WOULD YOU LIKE YOUR E-MAIL DELIVERED? [ ] 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** in the amount of \$40 (\$25 for students). Mail payment with this form to:

**Anne French**  
**Downey Brand**  
**621 Capitol Mall, 18<sup>th</sup> Floor**  
**Sacramento, CA 95814**

# *Legal Secretaries, Incorporated*

## LEGAL SPECIALIZATION SECTIONS

CIVIL LITIGATION

CRIMINAL LAW

FAMILY LAW

LAW OFFICE ADMINISTRATION

PROBATE/ESTATE PLANNING

TRANSACTIONAL LAW



### *ARE YOU A MEMBER OF THE LEGAL SPECIALIZATION SECTIONS?*

#### **IF NOT, HERE ARE TEN GREAT REASONS WHY YOU SHOULD BECOME A SECTION MEMBER:**

- Reasonable annual dues. (\$20.00 per section; \$75.00 for all six!)
- Continuing Education in all areas of the law.
- Quarterly educational programs -- Free to Section Members.
- Spring Regional Seminar (So. California) and Fall Regional (Northern California) offering a discount on registration fees to section members.
- Quarterly newsletters containing up-to-date information, including changes in the law, new forms, and legal articles.
- Statewide roster of all members in all sections, for easy access to local procedural information in other counties.
- California Certified Legal Secretary®/MCLE/Paralegal CEU credits.
- Networking provides a forum for the exchange of information.
- Respect from employer when you pass on valuable information obtained at workshops and seminars.
- Professional and personal excellence.

*For more information, contact Margaret Tovar, Legal Specialization Sections Coordinator.  
12412 Camilla Street, Whittier, CA 90601; Email: [mtovar@kbblaw.com](mailto:mtovar@kbblaw.com)*

## LEGAL SPECIALIZATION SECTIONS *Of LEGAL SECRETARIES, INCORPORATED*

### 2009-2010 MEMBERSHIP APPLICATION / ANNUAL RENEWAL FORM

Complete and mail with your check made payable to LSI, for \$20 for each section, or a total fee of \$75 per year to join all SIX sections simultaneously if an LSI Member, or \$40 for each section or a total fee of \$150 per year to join all sections simultaneously if joining as a non-LSI member.

Mail to: **MARGARET TOVAR, CCLS, Legal Specialization Coordinator,**  
12412 Camilla Street, Whittier, CA 90601

Enclosed is payment of my dues for the fiscal year **8/1/09** through **7/31/10** for the following Section(s). Please check appropriate boxes below for the sections you are joining.

**Method of Payment:** Check, payable to "LSI," enclosed  VISA  MASTERCARD   
**Credit Card Information:** Number \_\_\_\_\_ Expiration Date: Month \_\_\_\_\_ Year \_\_\_\_\_  
**Name on Credit Card:** \_\_\_\_\_ **Card Verification Number** \_\_\_\_\_

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

NEW	RENEWAL	
		<b>Criminal Law</b>
		<b>Family Law</b>
		<b>Law Office Administration</b>
		<b>Litigation</b>
		<b>Probate/Estate Planning</b>
		<b>Transactional Law</b>



**(PLEASE PRINT OR TYPE)**

NAME: MR./MRS./MS \_\_\_\_\_ PLS/CCLS/CLA/PARALEGAL

ADDRESS/CITY/STATE/ZIP \_\_\_\_\_

LOCAL ASSOCIATION: \_\_\_\_\_ LSA/LPA

RESIDENCE PHONE ( ) \_\_\_\_\_ BUSINESS PHONE: ( ) \_\_\_\_\_

E-MAIL ADDRESS(ES): \_\_\_\_\_

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

EMPLOYER'S ADDRESS: \_\_\_\_\_

**PREFERRED MAILING ADDRESS:  HOME  OFFICE  EMAIL**

YEARS OF LEGAL EXPERIENCE: \_\_\_\_\_

SPECIALTY: \_\_\_\_\_

FAMILIAR WITH PRACTICE IN COUNTIES OF (Please indicate each County, not area):

\_\_\_\_\_

**LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM**

ITEM	UNIT PRICE	QUANTITY	TOTAL
<b>BRASS TACKS*</b> A guide instructing local officers and chairmen on how to perform their respective duties. Contains check lists, calendars and forms. (Rev. 5/06)	\$ 5.00		\$
<b>CAREER PROMOTION/SCHOLARSHIP <i>NOT JUST A SECRETARY</i> BOOKLET</b> A 26-page booklet designed to assist local associations in promoting the career of legal secretary. Includes handout materials and an outline for use at career and scholarship promotion events. (Rev. 2/98)	5.00		
<b>CCLS BROCHURE</b> Tri-fold brochure promoting the benefits of taking the CCLS Exam. Includes tear-off to request application form and information kit. (Rev. 2/08)	N/C		
<b>CCLS MOCK EXAM 2006</b> Sample questions and answers to assist in preparing for all sections of the CCLS Exam.	20.00		
<b>CCLS PIN</b> A 1/2" high, 10-karat gold pin with CCLS logo. For the CCLS.	35.00		
<b>CCLS STUDY KIT</b> Contains Mock Exam (see above), Gregg Reference Manual with Basic and Comprehensive Worksheets and Instructor's Resource Manual.	120.00		
<b>GUIDELINES FOR HOSTING LSI CONFERENCES*</b> An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI Conference. (Rev. 2/08)	N/C		
<b>GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM</b> A 34-page guide, with sample forms, to assist with the planning and execution of a successful legal educational program. (Rev. 8/03)	5.00		
<b>HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND GUIDELINES*</b> A booklet with step-by-step directions, including rules and examples, for preparing a History Book for entry in the LSI History Book Competition. Created for local association historians and/or presidents. (Rev. 11/05)	5.00		
<b>HISTORY OF LEGAL SECRETARIES, INCORPORATED</b> A 50-page memory of people, places and events since 1929. (Rev. 2/06)	5.00		
<b>LAW OFFICE PROCEDURES MANUAL FLYER</b> An 8 1/2" x 11" advertisement of the LOPM. Includes listing of contents and Order Form. (Rev. 1/02)	N/C		
<b>LAW OFFICE PROCEDURES MANUAL INSTRUCTOR'S GUIDES</b> To assist instructors in conducting training classes. Teacher Training Chapter offers tips for teaching. Other Guides supplement Chapters of the LOPM and contain projects, instructions to student, completed and blank legal forms, exams and answer keys.			
TEACHER TRAINING CHAPTER (Rev. 9/07)	4.00		
ADOPTIONS CHAPTER (Rev. 9/07)	7.00		
CIVIL PROCEDURE CHAPTER (Rev. 9/07)	7.00		
CONSERVATORSHIP CHAPTER (Rev. 9/07)	7.00		
CORPORATIONS CHAPTER (Rev. 9/07)	7.00		
COURT STRUCTURE CHAPTER (Rev. 9/07)	7.00		
CRIMINAL LAW CHAPTER (Rev. 9/07)	7.00		
DISCOVERY CHAPTER (Rev. 9/07)	7.00		
FAMILY LAW CHAPTER (Rev. 9/07)	7.00		
PROBATE CHAPTER (Rev. 9/07)	7.00		
REAL ESTATE CHAPTER (Rev. 9/07)	7.00		
UNLAWFUL DETAINER CHAPTER (Rev. 9/07)	7.00		
WORKERS' COMPENSATION CHAPTER (Rev. 9/07)	7.00		
MISCELLANEOUS CHAPTER (Rev. 9/07)	7.00		
<b>LEGAL SECRETARY'S REFERENCE GUIDE</b> A legal procedure guide designed to assist local associations in conducting a training class. Also useful for training office personnel and as a general reference for experienced staff. (Rev. 4/07)	30.00		
<b>TOTAL THIS PAGE</b>			<b>\$</b>

\*Item available to LSI members only

(Prices effective 0508)

**LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM**

ITEM	UNIT PRICE	QUANTITY	TOTAL
<b>LSI BYLAWS AND STANDING RULES*</b> As currently adopted by the LSI Governors.	\$ 5.00		\$
<b>LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER</b> An 8 1/2" x 11" advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/02)	N/C		
<b>LSI LEGAL SPECIALIZATION SECTIONS BROCHURE</b> Lists Sections offered and reasons for joining. Includes Section Membership Application. (Rev. 2/08)	N/C		
<b>LSI MEMBERSHIP BROCHURE</b> Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application (Rev. 2/08)	N/C		
<b>LSI MEMBERSHIP PIN*</b> A 3/4" high oval gold-tone pin with blue and white enamel overlay. LSI logo in center and "Legal Secretaries, Incorporated" inscribed on circumference. For all LSI members.	3.00		
<b>LSI ROSTER*</b> Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.	N/C		
<b>MEMBERSHIP APPLICATION FORM*</b> An 8 1/2" x 11" form adopted 5/01 by LSI for use by all local associations. Includes request for Legal Specialization Sections information. Local associations may add second-page for supplemental information (Rev. 5/08) Can be transmitted as an e-mail attachment (Word format), if so requested.	N/C	<input type="checkbox"/> E-mail -or- <input type="checkbox"/> Printed	
<b>NEW MEMBER PACKET*</b> A 2-pocket folder containing letter from LSI President, LSI membership information, Specialization Sections Membership Application, list of benefits and providers, CCLS information, Legal Professional's and Law Office Procedures Manual flyer and Code of Ethics. Local associations may insert additional material. For new local association members only.	N/C		
<b>PRESIDENT'S PENDANT*</b> A 1" high oval gold-tone pendant with blue and white enamel overlay. LSI logo in center and "Legal Secretaries Association" inscribed on circumference. Eye for necklace chain on back. For local association presidents.	7.00		
<b>PRESIDENT'S PIN*</b> Same as pendant (see above), but with pin on back.	7.00		
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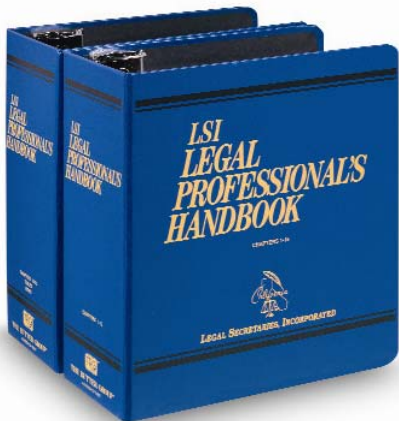
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# LEGAL SECRETARIES, INCORPORATED

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

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

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

### CONTENTS

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- Attachment/Other Provisional Remedies
- Commencement of Civil Actions
- Discovery in Civil Actions
- Pretrial and Judgment in Civil Actions
- Postjudgment Proceedings
- Civil Appeals and Writs
- ADR
- Foreclosures: Mortgages and Trust Deeds; Mechanic's Lien
- Unlawful Detainer
- Federal Civil Procedure and Appeals
- Bankruptcy
- Family Law
- Adoptions
- Criminal Law and Procedure
- Probate Proceedings: Decedents' Estates; Guardianships/Conservatorships; Trust Law
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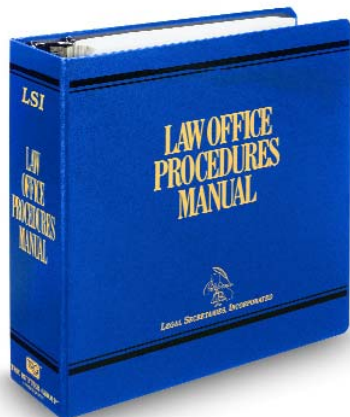
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**UP-TO-DATE:** The Manual is updated twice a year to include revised Judicial Council forms and other changes in applicable rules and procedures.

## CONTENTS

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- Unlawful Detainer
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- Criminal
- Family Law
- Adoptions
- Probate
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- Miscellaneous: Practice Tips; Service and Proof of Service; Fax Filings; Verifications; Substitution/Association of Counsel; Notarial Acknowledgments; Recording Laws; Forms of Address; U.S. Postal Service Addressing Standards and State Code Abbreviations; Transcription and Proofreading; Alphabetic Filing Rules; Calendars; Legal Abbreviations and Jargon; Office Procedures; Reference Materials
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MEMBERSHIP LIST AS OF 7/31/10**

Total Members (Fiscal Year-end 4/30/10)	Association		New Members	Transfer Members	Continuing Members	Total Members
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49	Beverly Hill/Century City	LSA	12		36	48
22	Butte County	LPA	2		16	18
29	Capitol City	LPA	7		21	28
8	Conejo Valley	LPA	0		5	5
22	Desert Palm	LPA	2		10	12
24	El Dorado County	LPA	1		15	16
43	Fresno County	LPA	8		35	43
46	Humboldt County	LPA	6		21	27
30	Imperial County	LPA	4		24	28
35	Livermore-Amador Valley	LPA	3		23	26
55	Long Beach	LSA	4		52	56
34	Los Angeles	LSA	15		24	39
16	Marin County	LPA	1		13	14
35	Merced County	LPA	4		26	30
20	Monterey County	LSA			8	8
66	Mt. Diablo	LPA	10		51	61
16	Napa County	LSA			15	15
80	Orange County	LSA	6		35	41
22	Palo Alto	LSA	5		18	23
26	Placer County	LPA	3		20	23
13	Redding	LPA				0
23	Rio Hondo District	LPA	5		12	17
27	Riverside	LPA	4		16	20
158	Sacramento	LSA	30		117	147
205	San Diego	LSA	58		133	191
60	San Fernando Valley	LSA	6		28	34
46	San Francisco	LPA	5		28	33
30	San Gabriel Valley	LSA	5		16	21
80	San Mateo County	LSA	7		63	70
28	Santa Barbara	LSA	3		19	22
52	Santa Clara County	LSA	7		43	50
20	Santa Cruz County	LPA			7	7
23	Santa Maria	LPA	2		12	14
38	Sonoma County	LSA	10		24	34
8	Southern Butte	LSA			9	9
37	Stanislaus County	LPA	3		33	36
46	Stockton-San Joaquin	LPA			29	29
4	Trinity County	LSA			4	4
25	Ventura County	LPA	1		16	17
28	Members at Large					20
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Membership list as of 7/31/10

# LEGAL SECRETARIES, INCORPORATED

ORGANIZED 1934



*Presents:*

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

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**CHANGE IN SPECIALTY:**

- |   |  |  |
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| <input type="checkbox"/> Administrative Law     | <input type="checkbox"/> Appellate Law | <input type="checkbox"/> Arbitration             |
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## 2010-2011

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by *Liz Gideon*

The Legal Eagle welcomes letters and article suggestions from readers. Please send them to: Liz Gideon, c/o Weintraub Genshlea Chediak, 400 Capitol Mall, 11th Floor Sacramento, CA 95814 or lgideon@weintraub.com.

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~ Harold R. McAlindon*

### *Code of Ethics*

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It shall be the duty of each Member of the Legal Secretaries, Incorporated to observe all laws, rules, and regulations now and 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.

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