



## Sacramento Legal Secretaries Association

# The Legal Eagle

Book 2013, Issue 11

November 2013



### In this issue

PROJECT BIRTHDAY

SPEAKER SPOTLIGHT

FAIRYTALE TOWN

RENO BUS TRIP



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### November Meeting Information

Come and join us to hear Kelley M. Taber, Esq. of Somach Simmons & Dunn speak on California Environmental Quality Act (CEQA) Law on November 21, 2013, at the Downtown Courtyard Marriott, 4422 Y Street, Sacramento, CA. 5:30 p.m. Meet and Greet, 6:15 p.m. dinner meeting.

#### President

Lynne Koroush

#### Bulletin Editor

Corene E. Rodder

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



NON-MEMBERS ARE WELCOME!

We're on the Web!  
[www.slsa.org](http://www.slsa.org)

## President's Message: "Giving Thanks"



Lynne Koroush, President

History tells us that when the Pilgrims first sailed from England to America on the Mayflower in 1620, most of the colonists remained on board the ship throughout that first brutal winter, where they suffered from exposure, scurvy and outbreaks of contagious disease. Only half of the Mayflower's original passengers and crew lived to see their first New England spring. In March of 1621, the remaining settlers moved ashore, where they received an astonishing visit from an Abenaki Indian who greeted them in English. Several days later, he returned with another Native American, Squanto. Squanto taught the Pilgrims, weakened by malnutrition and illness, how to cultivate corn, extract sap from maple trees, catch fish in the rivers, and avoid poisonous plants. In November 1621, after the Pilgrims' first corn harvest proved successful, Governor William Bradford organized a celebratory feast and invited a group of the fledgling colony's Native American allies to join them, including the Wampanoag chief Massasoit. Now remembered as America's "first Thanksgiving," although the Pilgrims themselves may not have used the term at the time, the festival lasted for three days.

The Native Americans did more than just teach the Pilgrims how to grow corn, collect sap, and catch fish. They ensured the survival and prosperity of a people who were not prepared for or properly skilled to deal with the reality of their situation. Although the circumstances are vastly different, I cannot help but make a small comparison with SLSA. Sometimes our members may not be prepared for the demands of this field, or they need assistance with adding skills

and training to help them in their professional development. We see it not only as our responsibility, but our privilege, to educate, encourage, and ensure the survival and growth of our members.

SLSA's mission statement reads as follows:

"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."

As of this writing, 392 years have passed since that first festival. Imagine if there had not been brave people like the Abenaki and the Wampanoag to teach, guide, and help the first colonists, and later join them in celebration of the fruits of their labor and harvest. We most likely would not have an annual holiday that encourages us to take time to give thanks for the blessings we enjoy and celebrate the fruits of our labor and harvest. I, for one, am thankful for their kindness and generosity of spirit. Likewise, I am grateful to the members of this association, both past and present, who have shown tremendous dedication and personal commitment to excellence for nearly 75 years. Your legacy and generosity of spirit gives me reason to reflect, give thanks, and celebrate an amazing and continuous harvest!

I sincerely wish each of you and your families a most warm, wonderful, and celebratory Thanksgiving season.



# Sacramento Legal Secretaries Association

## Dinner Meeting - November 21, 2013



### Kelley M. Taber, Esq.

Somach Simmons & Dunn

### “CEQA Law”

Vendor of the Month:  
Sacramento Legal Video Center

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

**Courtyard Marriott - Midtown Sacramento**  
4422 Y Street, Sacramento  
\$25 SLSA Members / \$30 Non-Members

**RSVP by Noon on Friday, November 15.** Make checks payable to SLSA, and mail to: Paula Lockard, CCLS, Registration/Reception Chair 2013-2014, c/o Sacramento City Attorney's Office, 915 "I" Street, 4<sup>th</sup> Floor, Sacramento, CA 95814. You may also register via e-mail at [reservations@slsa.org](mailto:reservations@slsa.org), or through our website at [www.slsa.org](http://www.slsa.org) under Upcoming Events.

Cancellations must be received 48 hours in advance for a refund. **No Shows will be billed.** Walk-ins and registrations received after the RSVP deadline are subject to a \$5 late fee.

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

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

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

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

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

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

Do you require a  MCLE or  CCLS certificate?

Are you an SLSA member?  YES  NO

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

Are you interested in volunteering with SLSA?  YES  NO

#### Entrée Selection:

**Italian Chicken** - Chicken breast with prosciutto, artichoke, mushrooms, and chardonnay garlic sauce.

**London Broil** - USDA Choice Cap-Off Top Round seasoned with black pepper, garlic, and a hint of lemon. Slow-roasted for a truly authentic, full flavor.

**Vegetarian Option:** Penne Pasta Primavera (roasted vegetables and sundried tomatoes).

*All meals will be served with salad and dessert.*



Sacramento Legal Secretaries Association's  
**Annual Holiday Mock Trial**

**Father Time (aka "Baby Face New Year")  
v. Fountain of Youth, Ltd: Three Coins in the  
Fountain Blown**

Vendor of the Month: Atkinson-Baker

Date: December 12, 2013  
Time: 6:00 PM  
Location: Courtyard Marriott, 4422 Y Street, Sacramento  
Cost: \$20 for Members; \$23 for Non-Members  
Meal: Assorted Appetizers & Desserts  
RSVP By: 12:00 Noon on Friday, December 6, 2013



**Ornament Exchange!**

Bring one gift-wrapped ornament (under \$10) to participate in the ornament exchange. *(Immediately following the Mock Trial)*



**Make checks payable to "SLSA," and mail to:**  
Paula Lockard, CCLS, Registration/Reception Chair 2013-2014  
c/o Sacramento City Attorney's Office  
915 "I" Street, 4th Floor  
Sacramento, CA 95814

You may also register via e-mail at [reservations@slsa.org](mailto:reservations@slsa.org), or through our website at [www.slsa.org](http://www.slsa.org) under Upcoming Events.

Cancellations must be received 48 hours in advance for a refund. No-Shows will be billed. Walk-ins and registrations received after the RSVP deadline are subject to a \$5 late fee.

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**Volunteer Actors Needed!!** *(Please contact Lynne Koroush at [koroushl@gtlaw.com](mailto:koroushl@gtlaw.com))*

Bailiff  
Judge  
Attorney for Plaintiff  
Attorney for Defense  
Father Time (aka "Baby Face")  
Jurors

Court Clerk  
Mother Nature (aka "Mama Nay-Nay")  
Rumplestiltskin  
Sparrow (aka "Captain Jack Sparrow")  
Alana Thompson (aka "Honey Boo-Boo")

**SLSA October 17, 2013 Dinner Meeting**



Jan Ainsworth, Sherri Lee Caplette, CCLS, and  
Debbie Frias, CCLS



Maimie Chyinski, Anne French, Deseree  
Gamayo, and Maryanna Rickner



Desiree Delonia and  
Nancy Vanderhorst, CCLS



Michelle Chavez, CCLS, Rebecca Lerma,  
Elizabeth Madden, CCLS, and Maimie Chyinski



Yelena Williams, Anne French,  
and CoSandra Pollard



Crystal Rivera and Jaymie Moralez

## Speaker Spotlight: Dennis Wade, “Managing Multiple Tasks”

Submitted by Lynne Koroush



Dennis Wade and President Lynne Koroush

Dennis Wade of People Development Systems was our guest speaker for the October 17, 2013, dinner meeting. Mr. Wade is principal of People Development Systems and has been involved in educating employees of private and public sector organizations for over 20 years. His experience managing employees at Intel Corporation and teaching students at Chapman University prepared him as an independent consultant and trainer. A graduate of UC Davis, Mr. Wade has a master's degree in Organization Development from the University of San Francisco.

Mr. Wade began his presentation on managing multiple tasks by stating, “One of the best ways to address work overload is to systematically attack it.” He explained that you do this by following four steps: collection; processing; organization; and, review. In other words, when a task or item lands on your desk or in your In-Box, it is in the “Collection” stage. You must next evaluate or “process” the task or item. Processing involves asking, what is it? If it's actionable, then what's the next action? Will it take less than two minutes? Mr. Wade subscribes to the theory that if it will take less than two minutes, it's probably worth it to just take care of it right then if you possibly can. If the task will take more than two minutes, is it something that can be delegated or deferred?

Once you have processed the task, you should then organize it. “Organizing” means calendaring, setting reminders, putting the item on your task manager, and so forth. All of the to-dos are no

longer in your head because they are either completed or they will be addressed later. Organizing frees your mind to focus on the tasks at hand without the incomplete to-dos bugging you in the background.

Finally, you should review. Mr. Wade says, “It's one thing to write down that you need milk; it's another thing to remember it.” Likewise, you need to recall all of the to-dos you have either delegated or deferred. He recommends reviewing next actions and your calendar at least once a day, and at least once per week you should review your project list as well as your “someday” or “when I can get to it” list.

Mr. Wade also discussed being realistic about timeframes. Tasks, for most of us, are familiar – you've done them before, especially in your job. Therefore, you should have a general idea of how long they will take to complete. Mr. Wade suggests estimating how long a task should take, then add 10% more time. Most of us, however, are overly optimistic about how long it will take to complete a task, particularly when managing multiples, so adding 20% more time may be a better idea.

When addressing conflicting priorities, Mr. Wade recommends asking yourself if the conflicting priorities are occasional or chronic. For occasional conflicting priorities, you can:

1. Ask for help.
2. Prioritize your schedule.
3. Work overtime.
4. Explain what's on your plate to your manager or supervisor and ask for assistance in prioritizing.

The second choice is probably the most common solution, but if nothing can wait until tomorrow and everything is important, the fourth option is the best way to go.

*(Continued on page 7)*

(Continued from page 6)

According to Mr. Wade, one of the causes of chronic task conflict is work overload. Check to see if there's a cure by asking the following questions.

1. Have I used the four-step process for managing multiple tasks?
2. Am I doing work that can be delegated?
3. Am I doing work that can be automated?
4. Am I doing tasks that I should no longer own? (i.e., change of position, etc.)
5. Am I doing work that can be outsourced?
6. Is it humanly possible to keep up with the workload?

If you've asked yourself the above questions and believe it's time to sit down with your supervisor to discuss managing your workload, you may feel reluctant to do so for fear of sounding like you're failing. "Discussing conflicting priorities and unrealistic expectations is difficult for most people, especially if it involves your boss," Mr. Wade stated. He recommends following what he calls a "Constructive Confrontation Approach." The key elements of this approach are:

**Be direct.** Address the problem with the person(s) who can solve the problem or help you solve it. Don't take the timid approach behind that person's back.

**Be factual.** Bring the facts with you instead of hearsay. If you do bring an opinion, identify it as such.

**Be constructive.** Address the problem, but don't attack the person. This helps to solve problems while preserving relationships.

When giving and receiving productive feedback, Mr. Wade recommends employing the following:

- A. Giving feedback. Use the P-O-I-S-E method for confidence to deliver feedback.
  1. Purpose – State your purpose (to improve a situation).
  2. Observed – State what you have seen.

3. Impact – State the potential impact.

4. Situation – Attack the situation, not the person.

5. Evaluate – Set a date to follow up and evaluate progress.

B. Receiving feedback. Use the P-A-U-S-E method before responding.

1. Protect – Don't protect yourself (being defensive).

2. Active – Actively listen.

3. Understand – Understand and acknowledge concerns.

4. Situation – Attack the situation, not the person (bears repeating for the third time)!

5. Evaluate – Suggest a date to follow up and evaluate progress.

Mr. Wade gave us plenty of opportunities to role play, explore various scenarios, and employ some of the suggestions and methods outlined above. He was a wonderful teacher and speaker, and our only regret, ironically, was there was not enough time! We would love to have Mr. Wade back to speak to us again, and we thank him for a very informative presentation.

If you would like more information about Mr. Wade or People Development Systems, please visit them online at [www.ppldev.com](http://www.ppldev.com), or call (916) 337-8255.



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

Kathy Montgomery	Nov. 1
Jaymie Morales	Nov. 1
Maribel Garza-Duran	Nov. 2
Janice Ainsworth	Nov. 6
Tamara Caves	Nov. 7
Desiree Stockton	Nov. 25





Submitted by Launa Atkinson, CCLS



## CCLS Quiz

### True or False?

1. \_\_\_\_\_ Do not use a comma before or after a quotation when it is woven into the flow of the sentence.
2. \_\_\_\_\_ Use a colon in place of a comma if the quotation is set off on separate lines as an extract.
3. \_\_\_\_\_ Do not use a colon in place of a comma if the introduction expression is an independent clause.
4. \_\_\_\_\_ If a displayed quotation starts in the middle of a sentence, use five spaced periods at the beginning of the quotation.
5. \_\_\_\_\_ Quote the words *yes* and *no* unless you wish to emphasize that these were (or will be) the exact words spoken.
6. \_\_\_\_\_ Do not use quotation marks to set off a *direct question* at the end of a sentence unless it is also a *direct quotation* (one that uses someone's exact words).
7. \_\_\_\_\_ A dash goes *inside* the closing quotation mark to indicate that the speaker's or writer's words have broken off abruptly.
8. \_\_\_\_\_ Periods and commas always go *inside* the closing quotation mark.
9. \_\_\_\_\_ Semicolons and colons always go *outside* the closing quotation mark.
10. \_\_\_\_\_ At the end of a sentence, a question mark or an exclamation point goes *inside* the closing quotation mark when it applies to the entire sentence.

## CCLS Vocabulary

1. Default – to fail to appear or to answer, act, or pay.
2. Property Declaration – in marriage dissolution proceedings, a list of all community and separate assets and obligations of the parties.
3. Respondent – the party who answers or responds to a petition
4. Temporary Restraining Order (TRO) – an order granted without hearing, demanding the preservation of the status quo until a hearing can be held to determine whether the injunctive relief requested is appropriate.
5. Bifurcate – to divide into two parts.
6. Discovery – pre-trial procedure by which one party gains information held by another party; the disclosure by a party of facts, documents, and other such things.
7. Family support – money paid pursuant to court order to or on behalf of a spouse and children.
8. Judgment – the official decision of the court in a proceeding.
9. Modification – a change in the terms and conditions of a court order.
10. Responsive Declaration – a declaration made by a responding party who elects to contest an order to show cause.

### **Congratulations to the following new SLSA member!**

#### **ACTIVE MEMBERSHIP**

*Welcome, and congratulations to the following new SLSA member, who was inducted at the October 17, 2013 meeting.*

**Doro Nesbitt** – Doro is a paralegal at the law office of Wagner Kirkman Blaine Klomprens and Youmans, LLP. She has been a legal professional since 1987, and is a former member of Capitol City LPA. Doro specializes in litigation and law office management. She enjoys movies, card games, technology and sewing. She celebrates her birthday on January 1.



### **Nominations and Elections Committee Report: Nominations for 2014-2015**

SLSA Members,

On behalf of the Nominations and Elections Committee, I would like to remind you that SLSA will soon begin taking nominations for the 2014-2015 fiscal year. In February, which will be here sooner than you think, we will elect the new board members. Now is the time to consider serving the association through volunteer leadership on the Executive Board. If you are interested in becoming involved, be sure to let us know so that we can add you to the ballot. Nominations will be accepted for the offices of

President  
Vice President  
Secretary  
Treasurer  
Governor  
Delegates (3)

Please keep in mind that a nominee for the office of President must have served at least one year as an elected officer of this association. All other positions are open to any member in good standing. In January, letters will be sent to all SLSA members requesting nominations and will include detailed job descriptions for each office. In the meantime, should you wish to add your name to the list, please let us know.

Thank you.

Jaymie Morales, Nominations & Elections Chair ([jmoralez@somachlaw.com](mailto:jmoralez@somachlaw.com))

Crystal Rivera, Nominations & Elections Committee Member ([crivera@somachlaw.com](mailto:crivera@somachlaw.com))

Astrid Watterson, CCLS, Nominations & Elections Committee Member ([awatterson@somachlaw.com](mailto:awatterson@somachlaw.com))

Sacramento Legal Secretaries Association

## LUNCH LESSON

November 13, 2013

12:00 Noon to 1:00 PM

### *“Citations Refresher: CA Style Manual & Blue Book”*

Presented by Rebecca Anderson Smith of Downey Brand LLP

Location: Downey Brand LLP, 621 Capitol Mall, 18<sup>th</sup> Floor, Sacramento, CA 95814

Cost: \$20 LSI Members, \$25 Non-LSI Members (NO REFUNDS)

**Reservations due by November 5, 2013**

*Lunch will be provided. Public parking is available in the building for a fee.*

RSVP to: Anne French  
c/o Downey Brand LLP  
621 Capitol Mall, 18<sup>th</sup> Floor  
Sacramento, CA 95814  
Tel: (916) 520-5268 / Fax: (916) 520-5668  
E-mail: [afrench@downeybrand.com](mailto:afrench@downeybrand.com)

**Make checks payable to: SLSA**



**\*\*\*Registration begins at 11:45 AM, and the Speaker will begin promptly at Noon\*\*\***

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

Firm: \_\_\_\_\_

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

Daytime Phone No.: \_\_\_\_\_ E-mail: \_\_\_\_\_

Are You A Member of SLSA?  Yes  No

Are You A Member of Another LSI Association?  Yes  No

If Yes, Which Association? \_\_\_\_\_

Check Here If You Would Like SLSA Membership Information: \_\_\_\_\_

Do You Require an  MCLE or  CCLS Certificate?

**MCLE & CCLS Credit:** SLSA, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of **0.75 hours**.

\\downeybrand.com\dfs\USERDATA\SACRAMENTO\afrench\Documents\SLSA\2013-09-24 Lunch Lesson Flyer.docx

# California Certified Legal Secretary

A Program of  
Legal Secretaries, Incorporated



## APPLICATION

Please complete and mail this form to the following address with your check to reserve your place at one of the examination venues:

**CCLS Certifying Board  
14403 Leibacher Avenue  
Norwalk, CA 90650**

<input type="checkbox"/> Northern California	<input type="checkbox"/> Saturday, October 19, 2013
<input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, March 15, 2014

Deadline: Application must be received 60 days prior to examination date. A late application *may* be accepted up to 30 days prior to the examination if submitted with a \$30 late fee, in addition to the fees listed below, *if space is available*.

EXAMINATION FEES*			
LSI MEMBERS**		Non-LSI MEMBERS	
Registration fee:	\$ 25.00	Registration fee:	\$ 75.00
Examination fee:	<u>\$ 100.00</u>	Examination fee:	<u>\$ 100.00</u>
Total	\$125.00	Total	\$175.00

Enclosed is a check in the sum of \$ \_\_\_\_\_ \*\*\*, payable to LSI.

\* Fees subject to change without notice.

\*\* LSI members: Name of local association: \_\_\_\_\_ LSA/LPA.  
**Please enclose a photocopy of your local membership card.**  
You must be a member upon application to be eligible for reduced fees.

\*\*\* Include \$30 late fee if applicable.

Name \_\_\_\_\_ Last 4 Digits of SSN \_\_\_\_\_

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

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

Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

E-mail(s): \_\_\_\_\_

Highest level of formal education completed: \_\_\_\_\_; Highest Degree: \_\_\_\_\_.

EMPLOYMENT RECORD: Please list legal secretarial employment, beginning with your most recent (or current) employment, to show a minimum of two full years of such employment. Attach a supplemental page if additional entries are necessary to show two full years of employment as a legal secretary.

Dates \_\_\_\_\_ Position \_\_\_\_\_

Employer \_\_\_\_\_

Address \_\_\_\_\_

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

Supervisor \_\_\_\_\_ Phone \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

Dates \_\_\_\_\_ Position \_\_\_\_\_

Employer \_\_\_\_\_

Address \_\_\_\_\_

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

Supervisor \_\_\_\_\_ Phone \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

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

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

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

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

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

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

SIGNATURE OF APPLICANT \_\_\_\_\_ DATE \_\_\_\_\_  
SPONSOR (IF ANY) \_\_\_\_\_ APPLICATION APPROVED \_\_\_\_\_

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

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

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

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

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

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

SLSA MEMBERSHIP APPLICATION (continued)

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

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

**YOUR SPECIALTY:**

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

**EDUCATION:**

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

**TYPE OF OFFICE:**

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

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

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

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

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

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

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

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

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

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

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

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



**Sacramento Legal Secretaries Association  
Membership Renewal Invoice**

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

Make check payable to:  
**Sacramento Legal Secretaries Association**

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

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

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

Are you a CCLS?  Yes /  No

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

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

TITLE: \_\_\_\_\_

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

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

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

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

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

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

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

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

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

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

**YOUR SPECIALTY:**

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

**MAILING/LISTING INFORMATION:**

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

**INVOLVEMENT:**

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

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

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

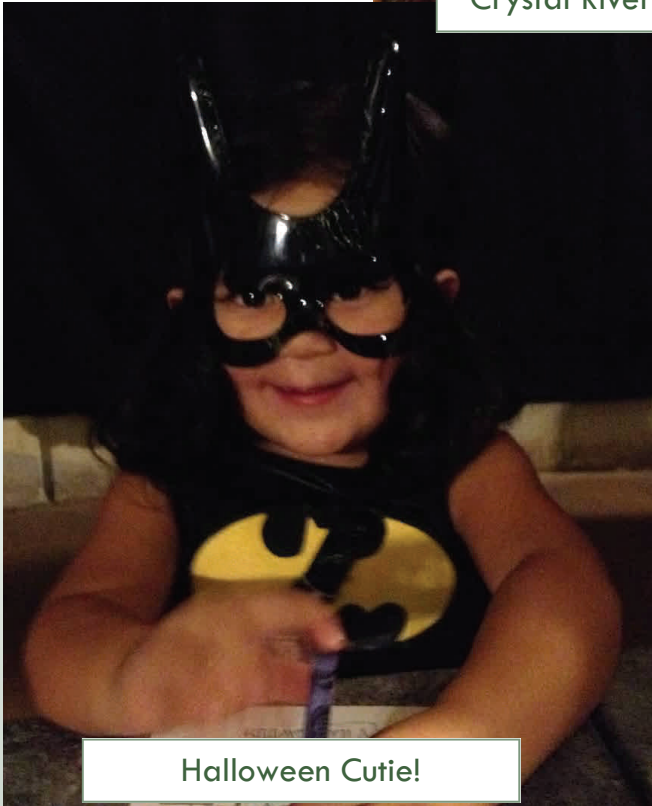
<b>SLSA USE ONLY</b>	Date Received: _____	On Roster: _____
	Check no.: _____	On LSI: _____
	On Email List: _____	To Editor: _____



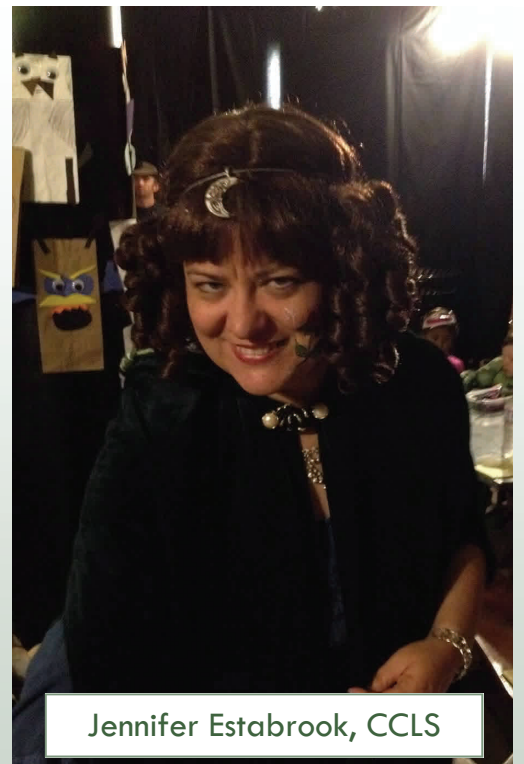
# FAIRYTALE TOWN 2013



Crystal Rivera and Deseree Gamayo



Halloween Cutie!



Jennifer Estabrook, CCLS

# FAIRYTALE TOWN 2013



Alex Cain and Jade Godey



President Lynne Koroush



Fairytale Town Cutie



Crafts for the Kids

# FAIRYTALE TOWN 2013



Happy Family enjoying the crafts!



Crystal Rivera handing out candy



Dawn Forgeur, CCLS, Crystal Rivera, and Deseree Gamayo

**Please note that the RSVP deadline for all regular monthly meetings is now Noon on the Friday before the meeting.** We have had to move our RSVP cut-off date in order to meet food ordering deadlines from the Courtyard Marriott. Please make note of it, as this is now SLSA's standard reservation deadline for regular dinner meetings.



**SUPERIOR COURT OF CALIFORNIA  
COUNTY OF SACRAMENTO**

WWW.SACCOURT.CA.GOV

**CIVIL LAW AND MOTION DEPARTMENTS  
CLOSURE IN DECEMBER/JANUARY**

Due to the December/January holidays, the Civil Law and Motion Departments, Department 53 and Department 54 will be **dark/closed** on the following days:

**Dept 53**

December 26, 2013

**Dept 54**

December 27, 2013

**CALIFORNIA CENTRAL DISTRICT:**

Please plan accordingly.

**IMPORTANT NOTICE: CM/ECF WILL NOT BE AVAILABLE OCTOBER 12-14**

**Due to a system upgrade, CM/ECF will not be available during the Columbus Day weekend from Saturday, October 12 at 8:00 a.m. Pacific Standard Time until Monday, October 14 at 6:00 p.m. Pacific Standard Time. You will NOT be able to e-file or access the CM/ECF System during this time.**

All e-filers must anticipate any necessary filing deadlines. This is **not** considered a "technical failure" as outlined in L.R. 5-4.6.2.

**Answers to the CCLS Quiz**

1. T
2. T
3. F
4. F
5. F
6. F
7. T
8. T
9. T
10. F

## CHANGES?? UPDATES??

Are you an SLSA member who has moved? Changed jobs? Been promoted? Recently engaged or married? New addition to the family? We want to know about you!! Let us celebrate your accomplishments with you during the good times, and support you during the tough times. Please send your news to [treasurer@slsa.org](mailto:treasurer@slsa.org)



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

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

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

NAME: \_\_\_\_\_  
FORMER NAME: \_\_\_\_\_  
NEW EMPLOYER: \_\_\_\_\_  
BUSINESS ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_  
STATE & ZIP: \_\_\_\_\_  
BUSINESS PHONE: \_\_\_\_\_  
FAX: \_\_\_\_\_  
BUSINESS E-MAIL: \_\_\_\_\_  
NEW HOME ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_  
STATE & ZIP: \_\_\_\_\_  
HOME E-MAIL: \_\_\_\_\_

#### CHANGE IN SPECIALTY:

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

#### CHANGES TO MAILING/LISTING INFORMATION:

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

Where do you want e-mail delivered?

Which address should be listed in the membership roster?

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

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

Please submit to:

**Attn: Maryanna Rickner**  
**SLSA Treasurer 2013-2014**  
**c/o Sacramento County Office of Education**  
**PO Box 269003**  
**Sacramento, CA 95826-9003**  
**E-mail: [treasurer@slsa.org](mailto:treasurer@slsa.org)**

At over 200 MPH, the Peregrine Falcon is the fastest animal on the planet.

Rumor has it they trained here at Atkinson-Baker.



  
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Editor-Corene E. Rodder

## Editor's Note

The Legal Eagle always welcomes letters and article suggestions from readers. Please send them to: Corene E. Rodder, c/o Greenberg Traurig, LLP, 1201 K Street, Suite 1100, Sacramento, CA 95814 or [rodderc@gtlaw.com](mailto:rodderc@gtlaw.com).

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

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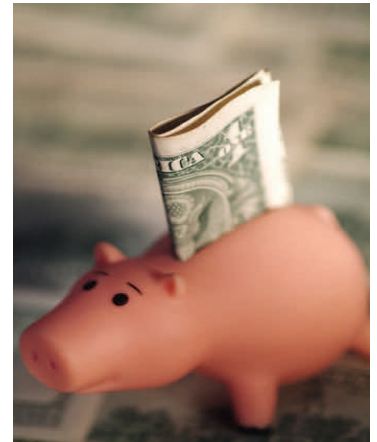
Submitted by Kimberly Ann Smith

## Benefits

**This month, we are putting the spotlight on two of the benefits you enjoy as an LSI member.**

**Provident Credit Union** -- Currently the 71st largest credit union in the U.S. (17th largest in California),

Provident Credit Union was established in 1950 to serve the California Teachers Association. Headquartered in the San Francisco Bay Area, Provident Credit Union now serves more than 100,000 members from over 1200 employer groups and maintains branches throughout California, and nationwide. [www.providentcu.org](http://www.providentcu.org)



**Legacy Wealth Management** -- Helps individuals and families during life transitions such as retirement, death of a loved one, or divorce. We provide a customized system enabling each client to make important financial decisions while helping them focus on the development of a future personal legacy. Legacy's focus areas include growth of assets, retirement planning, tax control, estate planning, educational planning, increasing liquidity/income, risk management, and liability management.

[www.legacywealthmanagement.biz](http://www.legacywealthmanagement.biz)

# RENO BUS TRIP - OCTOBER 12, 2013

Submitted by Michelle Chavez, CCLS, and Elizabeth Madden, CCLS of SLSA, and Christie Ensley of PCLPA



The SLSA/PCLPA Reno Bus Trip was held on Saturday, October 12, 2013. The trip was extremely successful. Most who attended expressed how much fun they had on the trip. THIS WAS A SOLD OUT EVENT!!! DeMichelle-Huseby included the Reno Bus Trip on their blog. It can be accessed at the following: <http://www.huseby.com/blog/>.

Based on feedback from the 2011 Reno bus trip, participants wanted a trip to downtown Reno. Sherrie at All West arranged for a bus that holds 56 to go to the Silver Legacy for six hours. Upon arrival, everyone received two \$5 casino play coupons, and a \$5 food coupon.

Legalese also gave each attendee a Koozy filled with goodies for the ride to Reno. For those who drank beer or soda, those Koozies came in handy!

The trip was also very profitable thanks to SLSA's quick-thinking president, Lynne Koroush. A letter was sent out to our various vendors and law firms requesting sponsorship for the trip. Sponsorship was offered at various levels: A special thanks to our sponsors this year:

Gold Nugget Sponsors - US Legal and Greenberg Traurig

Silver Strike Sponsor - Murphy Austin

Bronze Blazer Sponsors - Legalese, DeMichelle-Huseby, Whittal-Scherfee Law Office, Pacific Records Management, Capitol Legal Investigations, and Matt Patterson.

We played two games on the way to Reno: Guess the bus driver's birthday and Find-A-Word. Crystal Rivera of SLSA donated the game prizes.

Opportunity Drawing tickets were sold on the way to Reno and on the return trip home. We had 50 opportunity drawing items from members, law firms, and vendors. A list of sponsors and donors is attached to this report. A big thank you to Dawn Willis who was our ticket seller on the bus.

The Italian Festival was taking place in Reno the same weekend as our bus trip. Those who did not want to gamble much or at all were able to attend the festival. Luckily the festival was on the street right outside of the Silver Legacy, so one did not need to walk far to enjoy the Italian food and festivities.

On the return trip each attendee received a goodie box filled with a bottle of water, pretzels, corn nuts, gum, an apple, and candy. The goodie boxes were donated by DeMichelle-Huseby, along with an additional little bag in the box. In each little bag was a scratcher. If you had a number on your scratcher, you would receive that amount in California scratchers. Thank you, DeMichelle-Huseby! The remaining contents were donated by PCLPA, members of PCLPA, members of SLSA, and Capitol Digital Document Solutions.



# THANK YOU!

*Sacramento Legal Secretaries Association  
and  
Placer County Legal Professionals Association*

Wish to thank the following for your generous donations to this year's Reno Bus Trip. We couldn't have done this without you!



## **MAJOR SPONSORS:**

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Legalese  
Capitol Legal Investigations  
A-1 Process Serving  
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Pacific Records Management  
Nationwide Legal  
Carroll, Burdick & McDonough, LLP  
Somach Simmons & Dunn  
Whittall-Scherfee Law Office

## **DONORS:**

Don Benson, Edward Jones  
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Gloria Lamm, Christie Ensley  
Michelle Rodgers, CCLS  
Vicki Young  
Jeri White-Turtle  
Tamara Watson, CCLS  
Dawn Forgeur, CCLS  
Crystal Rivera  
Corene Rodder  
Maryanna Rickner  
Teresa Stinson, Sac County Office of  
Education  
Lynne Koroush  
Milton and Elizabeth Madden, CCLS  
Debbie Frias, CCLS  
Johnny Bateman  
All West Coach Lines Inc.



# RENO BUS TRIP - OCTOBER 12, 2013



Michelle Chavez, CCLS, Elizabeth Madden, CCLS,  
and Crystal Rivera



Luke Patterson and Matt Patterson



A Full Bus!



Chastity and Jeff from Legalese



Johnny Bateman and Friend



Jennifer Estabrook, CCLS, and Steve Estabrook

# RENO BUS TRIP - OCTOBER 12, 2013



Debbie Frias, CCLS, and Dawn Forgeur, CCLS



Kathleen DeFevre and Jeff DeFevre, PCLPA



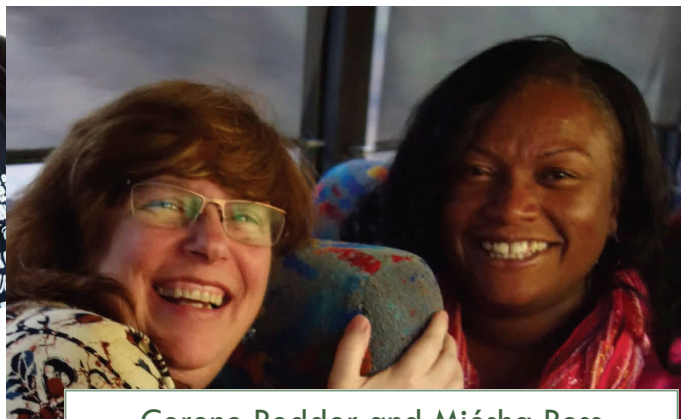
Lynne Koroush and Sabrina Pedeupe



Lacy Monseratt and Dawn Willis



Adam Strautman and Bobby Rodriguez



Corene Rodder and Miésa Ross

# RENO BUS TRIP - OCTOBER 12, 2013



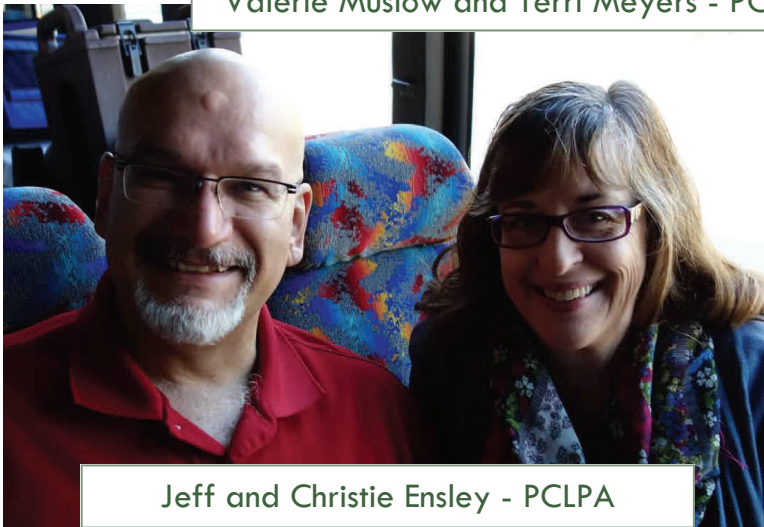
Sean Bryans and  
Jessica Shepard



Debbie Frias, CCLS, Jennifer Estabrook,  
CCLS, and Paula Lockard, CCLS



Valerie Muslow and Terri Meyers - PCLPA



Jeff and Christie Ensley - PCLPA



Miésa Ross and Lynne Koroush



Muriel Roth and daughter - PCLPA



Shanna DeMichelle-Zanone and  
CeCe DeMichelle



**LEGAL SPECIALIZATION SECTION SEMINARS**  
**LSI 2nd Quarterly Conference – November 15-17, 2013 – Hotel Maya**  
**Hosting Association: Long Beach LPA**



**REGISTRATION FORM - DEADLINE IS Tuesday, November 5, 2013**  
 Registration **MUST** be **RECEIVED** by the LSS Coordinator **on or before the deadline.**

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

LSI SECTION MEMBER: Free with Advanced Reservations: \$5.00 at the Door/After Deadline Handout Only: \$5.00	LSI NON-SECTION MEMBER: \$10.00 with Advanced Reservation \$15.00 at the Door/After Deadline Handout Only: \$10.00	NON-LSI MEMBER: \$15.00 with Advanced Reservation \$20.00 at the Door/After Deadline Handout Only: \$15.00
<b>Friday, November 15, 2013 – 7:30 p.m. to 9:00 p.m.</b>		
<b><u>CRIMINAL LAW:</u></b> Topic: "Criminal Law & Procedure" Speaker: Richard L. Poland, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<b><u>LAW OFFICE ADMINISTRATION:</u></b> Topic: "Data Security - Client Files in the Cloud" Speaker: Adrian Francoz, Senior Solutions Consultant, WAMS <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
<b>Saturday, November 16, 2013 – 10:30 a.m. to 12:00 p.m.</b>		
<b><u>FAMILY LAW:</u></b> Topic: "Termination of Parental Rights" Speaker: Lauren K. Johnson, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<b><u>TRANSACTIONAL LAW:</u></b> Topic: "Intellectual Property Through Tax Filters" Speaker: Curt Harrington, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
<b>Saturday, November 16, 2013 – 4:00 p.m. to 5:30 p.m.</b>		
<b><u>CIVIL LITIGATION:</u></b> Topic: "Employment Law Updates" Speaker: Pamela A. Swindells, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<b><u>PROBATE/ESTATE PLANNING:</u></b> Topic: "Trust Funding – Trust Wrap-up" Speaker: Marie A. Cloth, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	

Name: \_\_\_\_\_ PLS/CCLS/CLA/Paralegal E-mail: \_\_\_\_\_  
 Address/City/State: \_\_\_\_\_  
 Phone: (Work) \_\_\_\_\_ (Home) \_\_\_\_\_ Local Assn.: \_\_\_\_\_ LSA/LPA  
 Method of Payment:  Check  Credit Card Number \_\_\_\_\_ Expiration Date: \_\_\_\_\_  
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**Mail, Fax, or Email completed form to:**

Cheryl L. Kent, PLS, CCLS, LSS Coordinator  
 P.O. Box 12082, Pleasanton, CA 94588  
 925-523-3086 (fax) ~ [clkccls@comcast.net](mailto:clkccls@comcast.net)

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

**PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"**

*Speakers and Topics are Subject to Change*

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.

*The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1.25 hours each, by the State Bar of California.*

**2013-2014 Legal Specialization Section Leaders:**

<b>Civil Litigation:</b> Dawn R. Forgeur, CCLS: <a href="mailto:dforgeur@stoel.com">dforgeur@stoel.com</a>	<b>Law Office Administration:</b> Tamm y L. Hunt, CCLS <a href="mailto:loaleader@thunt.org">loaleader@thunt.org</a>
<b>Criminal Law:</b> Jill Gardella <a href="mailto:jgardella@nablaw.com">jgardella@nablaw.com</a>	<b>Probate/Estate Planning:</b> Kristi L. Edwards, CCLS <a href="mailto:kledwards@justice.com">kledwards@justice.com</a>
<b>Family Law:</b> Mary Lou Floyd, CCLS, M.S. <a href="mailto:Loufou7@yahoo.com">Loufou7@yahoo.com</a>	<b>Transactional Law:</b> Lisa De La O <a href="mailto:ldeiao@fitcheven.com">ldeiao@fitcheven.com</a>

# LEGAL SPECIALIZATION SECTIONS

## *Of LEGAL SECRETARIES, INCORPORATED*

### 2013-2014 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: **Cheryl L. Kent, PLS, CCLS, Legal Specialization Sections Coordinator**  
**P. O. Box 12082, Pleasanton, CA 94588**

Enclosed is payment of my dues for the fiscal year **8/1/13** through **7/31/14** 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** \_\_\_\_\_

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<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

- Civil Litigation
- Criminal Law
- Family Law
- Law Office Administration
- Probate/Estate Planning
- Transactional Law



(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: \_\_\_\_\_

**PLEASE NOTE PREFERRED EMAIL ADDRESS. NEWSLETTERS, ROSTERS, AND OTHER COMMUNICATIONS, WILL BE SENT VIA EMAIL UNLESS REGULAR MAIL IS SPECIFICALLY REQUESTED.**

**I prefer communication via USPS**  (indicate preferred address: home  work )

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

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

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

## BENEFITS

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

<p style="text-align: center;"><b>DISCOUNT THROUGH CEB</b></p> <p>Members of Legal Secretaries, Incorporated are offered a reduced cost for certain educational benefits (seminars, publications) through Continuing Education of the Bar. For more information, visit <a href="http://ceb.com/LSI/">http://ceb.com/LSI/</a></p>	<p style="text-align: center;"><b>WORKING ADVANTAGE</b></p> <p>Toll Free: (800) 565-3712  <a href="http://www.workingadvantage.com">www.workingadvantage.com</a>          Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more.          Member ID: Contact LSI Corporate Office, <a href="mailto:lsiorg@suddenlink.com">lsiorg@suddenlink.com</a>, or LSI Vice President</p>
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<p><b>INSURANCE AND FINANCIAL PROVIDERS</b></p>	
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QUESTIONS AND CONCERNS CONTACT:  
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 LSI Marketing Committee Coordinator  
 939 Hough Avenue, #22, Lafayette, CA 94549  
 Cell - (415) 717-5675  
[marybeau@comcast.net](mailto:marybeau@comcast.net)



### Submitted 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.

Employers/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, and years of experience required. The attorney/employer is requested to e-mail the Employment Chair with the advertisement formatted like

those currently posted on the "Employment Opportunities" page. 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. 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.

**(11/4/13) Law Clerk/Legal Assistant.** Seeking a Law Clerk/Legal Assistant for a three attorney midtown firm. The candidate should have a working knowledge of litigation procedures. Experience in case management, calendaring, court rules, court filings, and communication with court personnel is preferred. Proficiency in WordPerfect, case management software and preparation of Judicial Counsel forms is beneficial. Candidate should be organized, detail-oriented, self-motivated, and able to multi-task and work independently. Job responsibilities include: administrative/clerical functions, drafting legal documents (e.g., motions, stipulations, letters, etc.), and court filings (including e-filing), among other tasks. Please send resume, salary expectations, and cover letter via e-mail to Denise Carruth at [Lawgroup344@yahoo.com](mailto:Lawgroup344@yahoo.com).

**(10/2/13) Civil Litigation Secretary/Paralegal.** Civil Litigation/Paralegal Needed. Evers Law Group seeks an experienced litigation secretary/paralegal to work in a team environment on heavy business litigation matters. Applicant must have at least five years litigation experience and be proficient in WordPerfect, TimeSlips, Abacus, calendaring, etc. A working knowledge of the Code of Civil Procedure, California Court Rules and The Discovery Act is a must. Evers Law Group offers flexible hours, paid holidays, and paid vacation after successful completion of probationary period. Wage is based on experience. Please email your resume and hourly wage requirements in pdf format to [k.evers@everslaw.com](mailto:k.evers@everslaw.com).

**(9/11/13) Bilingual (English/Spanish) Litigation Secretary.** BEESON, TAYER & BODINE, a 20-attorney Union-side labor law firm with California offices in Oakland and Sacramento, has an opening for a bilingual (English/Spanish) litigation secretary in our Sacramento Office starting January 1, 2014. This position supports our traditional labor law board practice. Our support

*(Continued on page 33)*



*(Continued from page 32)*

staff works as a team with our attorneys in support of the labor movement as well as the rights of individual employees. The Sacramento Office is comprised of highly motivated, committed, collaborative and professional individuals - we are looking to find another such person to join our team. For information about our firm, please see our website at [www.beesontayer.com](http://www.beesontayer.com). The starting hourly rate for this position is \$35.50 (\$64,610.00) annually for a thirty-five hour workweek). The rate of pay will increase after twelve months to \$37.00/\$67,340.00. In addition, we offer an excellent benefit package which includes a traditional pension plan, parking allowance, and 100% employer-paid family coverage (medical, dental and vision). Retiree coverage is also available after meeting certain requirements.

**Requirements:** The position requires a minimum five years recent legal secretarial experience, including two years of relevant litigation experience in state and federal courts. This position also requires written and spoken fluency in both Spanish and English. Significant experience with computerized, rule set based calendaring programs is also required. We will not consider applications that do not meet these minimum requirements. The ability to work independently and pro-actively is necessary. The successful candidate is also able to work cooperatively, is extremely comfortable with technology and change, has a professional demeanor, good judgment, and exceptional attention to detail. Prior experience with labor and employment/NLRB/PERB matters is desired, experience with ProLaw and e-filing is a plus.

**Interview Process:** This position will be open on January 1, 2014, although an earlier start date is possible. The first interview will be with the office administrator and the current secretarial staff. Three candidates will proceed to second interviews with the firm's partners. Beeson, Tayer & Bodine is an Equal Opportunity Employer and invites candidates from all backgrounds to apply. Please submit cover letter and resume as well as salary history and requirements to [employment@beesontayer.com](mailto:employment@beesontayer.com). No telephone calls or in-person applications. All inquiries will be held in confidence.





### Submitted by Debbie Frias, CCLS

I went into the LSI Legal Procedures Blog this morning and am continually amazed at how much information my state counterpart, Jeff Weddle, is putting into it! I am going to once more nag members to look at the blog, if you have not done so already. Log onto LSI's website, [www.lsi.org/members](http://www.lsi.org/members) only/Legal Procedures. Please get the password from President Lynne

if you have not accessed this area before. Here are a few updates from Jeff's blog:

Stanislaus Superior Court - Effective September 30, 2013, hours are extended to 4 p.m. Monday through Thursday. Fridays, they close at noon; however phone hours, and self-help office hours are from 8 a.m. to 3 pm.; and there are established court runner hours for civil and family law divisions.

A comparison chart for the differences between federal and state discovery rules was apparently prepared by one of Jeff Weddle's colleagues. I am sending this to Corene to print with this bulletin, but Jeff cautions us not to rely on just this chart; there are cites to respective code sections to verify accuracy.

Los Angeles Superior Court - New local rules re personal injury cases:

1. They are NOT conducting Mandatory Settlement Conferences;
2. Non-discovery motions are heard at 1:30 p.m. (vs. 8:30 a.m.);
3. Parties must participate in an informal Discovery Conference ("IDC") with a personal injury court judge before the court will hear a motion to compel further discovery. The IDC is an informal in-person, 30-minute meeting among the parties and judge.

The federal courts have more updates as well; here are a few:

Effective October 1, 2013, the USDC for the Eastern District of California is a Microsoft Word only court. All documents required to be submitted to the court in word processing format pursuant to Local Rules 137, 163 and 281 (proposed orders, jury instructions, and pretrial statements) must be submitted in Word format. More information may be found on the Word Format page:

<http://www.caed.uscourts.gov/caednew/index.cfm/attorney-info/word-format/>.

Astrid Watterson, CCLS, provided an email recently regarding USDC Eastern District rules which took effect October 1 (thank you, Astrid!):

Local Rule 101 (Fed. R. Civ. P.1) - Definitions;

Local Rule 137 (Fed. R. Civ. P.5) - Reduction of Orders to Writing - Service of Orders;

Local Rule 159 (Fed. R. Civ. P.16) - Notice of Filing Bankruptcy;

Local Rule 163 (Fed. R. Civ. P.51) - Jury Instructions and Verdicts (Civil and Criminal Actions);

Local Rule 202 (Fed. R. Civ. P.17) - Minors and Incompetents;

Local Rule 205 (Fed. R. Civ. P.23) - Special Rule for Class Actions;

Local Rule 281 (Fed. R. Civ. P.16) - Pretrial Statements;

Local Rule 403 (Fed. R. Civ. P.5) - Court Interpreter Services in Criminal Actions; and

Local Rule 460 Fed. R. Civ. P.32, 18 U.S.C. §3152(c) Disclosure of Pre-Sentence Reports, Pretrial Services Reports and Related Records.

Finally, the USDC, Central District of California posted a notice entitled, "Attorney Case-Opening Pilot Project." Basically the Court has established a pilot project which allows for the electronic filing of new civil cases. Beginning October 7, 2013, attorneys may open new civil cases in the CM/ECF System and file both new and amended complaints electronically in the following kinds of cases only:

Student loan cases (filed pursuant to 20 U.S.C. §1080, et seq.);

Patent, trademark, and copyright cases; and

Employee Retirement Income Security Act ("ERISA") cases (filed pursuant to 29 U.S.C. § 1001, et seq.)

For more detailed information regarding Attorney Case-Opening Pilot Project, refer to the Court's Amended General Order No. 13-01. For instructions on filing new civil cases electronically, refer to the Attorney Case-Opening Pilot Project User Manual. Both documents are available on the court's website at [www.caed.uscourts.gov/e-filing/civil-case-opening](http://www.caed.uscourts.gov/e-filing/civil-case-opening), as are step-by-step training videos demonstrating the electronic case-opening process.

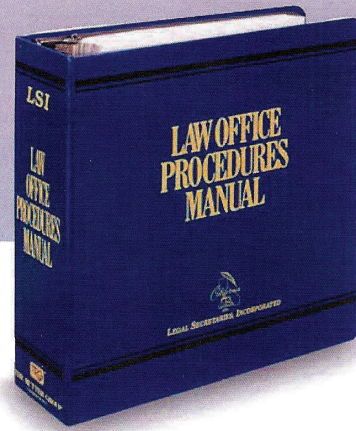
**Check out LSI's New Legal Procedures Blog!**

**[www.lsi.org](http://www.lsi.org)**

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## Charitable Projects: Project Birthday

Submitted by Connie Kelley



The Project Birthday event was held on October 22, 2013, at the Next Move Sacramento family shelter.

Project Birthday is a 100% volunteer organization

providing birthday parties to children currently living in shelters and transitional housing throughout the Sacramento area. In 2012, 100+ birthdays were celebrated and over 500 children attended parties at several local shelters.

This event was originally planned as a birthday party for the children at the shelter whose birthdays are in October (Calvin and Mattlyn). Calvin and Mattlyn's families had moved out before the party, so we decided to turn the party into a Halloween Party for all the children at the shelter to enjoy. We provided dress-up costumes, face-painting, temporary tattoos, games, pizza, juice, cupcakes and goodie bags. The children ranged in ages from toddler to teenagers. Each one was smiling and having a good time. Even the teenagers participated in the costume dress-up (after some coaxing), temporary tattoos, and the "Pin the Tail on the Cat" game.

As it turned out, Mattlyn's family was able to return to the shelter for the party! It was truly heartwarming to see the smile on her face as we sang Happy Birthday and watched her opening gifts. She received clothing, hair accessories, jewelry, make-up and a pair of new tennis shoes.

When we learned that Calvin's family could not return to the shelter for the party, and because gifts were already purchased for him, we contacted St. John's Women's Shelter to see if we could donate items to children there. We received great news that there were two children in the shelter with October birthdays – a 3-year-old boy named Taj, and an 8-year-old girl named Priscilla. We were able to donate all the gifts purchased for Calvin, and received donated clothes and toys for Priscilla, which were delivered to St. Johns Women's Shelter the next day!

I received the following note from the contact person at Next Move regarding the party:

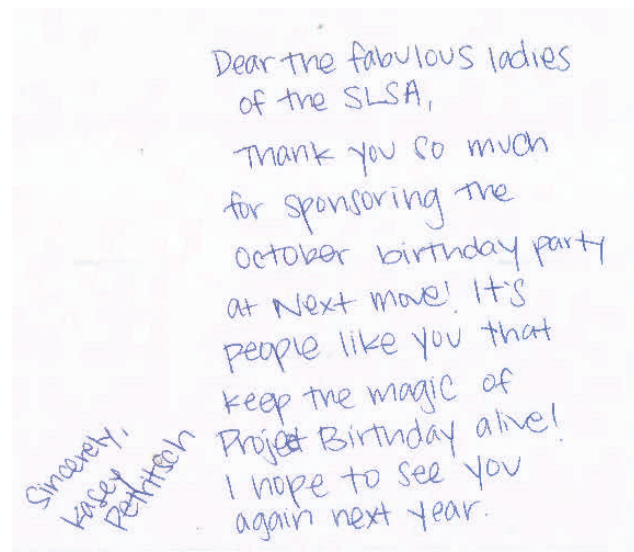
"I just wanted to say thank you for the party. It went off really well I thought, and I know the kids had a lot of fun. Mattlyn seemed very happy with her gifts, so all in all I think it was terrific. Thanks again, Jeff H."

There are several photos of this event on the Project Birthday Facebook page at <https://www.facebook.com/ProjectBirthday#!/ProjectBirthday>.

A big thanks goes to the following SLSA members and friends who donated gifts and volunteered at the party:

Michele Clark	Rebecca Lerma
Dawn Forgeur, CCLS	Crystal Rivera
Roxanne Forestiere	Paul Simmons
Lisa Haddix	Somach Simmons & Dunn
Connie Kelley	Alexis Stevens
Louinda Lacey	Kelley Taber
	Elizabeth Wenneker

This was truly a wonderful experience for all SLSA volunteers and we appreciate all of your support!



# PROJECT BIRTHDAY



Birthday Girl, Mattlyn



All dressed up!



Fun with costumes



Too cute in their Halloween Finery!



Crystal Rivera, Rebecca Lerma, Connie Kelley, Elizabeth Wenneker, and Lisa Haddix

## SLSA'S DECEMBER CHARITABLE PROJECT

SLSA is again participating in the Sacramento Loaves & Fishes Christmas Stocking Giveaway.

Let's try to fill at least 30 stockings this year!



We are looking for the following items:

- New or gently used Christmas Stockings
- McDonald's \$5 Gift Certificate(s)
- New socks, one size fits all
- Stretch/knit hat, gloves and scarves
- Travel-size toiletry items (lotions, Vaseline, conditioners, shampoos, soap, hand sanitizer)
- Disposable razors (adult stockings only)
- Deodorant
- Chapstick
- Toothbrush and toothpaste
- Decks of cards
- Gum
- Shoelaces
- Hand Warmers
- Feminine products

***We are also looking for items specific to children.***

Donations of filled Christmas stockings OR items to put in the stockings can be brought to SLSA's December 12 Mock Trial. If you're unable to attend the December Mock Trial but have items to donate for the stockings, please contact any of the Charitable Projects Committee Chairs to make other arrangements.

**Deadline for SLSA to drop off donated stockings is December 20.**

**A BIG THANKS for your support of SLSA's charitable projects!**

Rebecca Lerma, Chair [mlerma@stoel.com](mailto:mlerma@stoel.com); (916) 319-4790  
Crystal Rivera, Co-Chair [crivera@somachlaw.com](mailto:crivera@somachlaw.com); (916) 469-3813  
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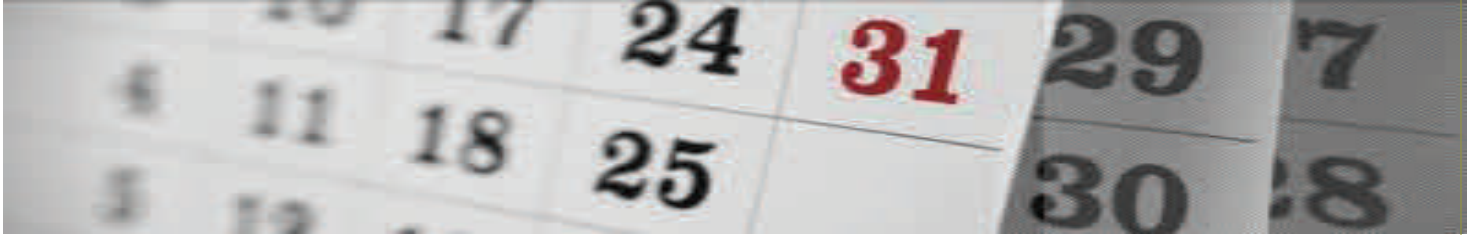
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## Calendar/Dates to Remember



### **November**

**Nov. 5** – Lunch Lesson (rescheduled). “Collections 101: From Complaint to Writ of Execution.” Downey Brand, 11:45 AM – 1:00 PM, 621 Capitol Mall, Sacramento.

**Nov. 11** – Veteran’s Day. All state and federal courts closed. No mail service.

**Nov. 11** – SLSA Executive Board Meeting, 5:30 pm, Greenberg Traurig, 1201 K Street, Suite 1100, Sacramento, CA. All members welcome.

**Nov. 13** – Lunch Lesson. “Citations Refresher – Blue Book & CA Style Manual.” Downey Brand, 11:45 AM – 1:00 PM, 621 Capitol Mall, Sacramento.

**Nov. 15-17** – LSI 2<sup>nd</sup> Quarterly Conference in Long Beach, CA.

**Nov. 21** - SLSA Membership Meeting. 5:30 pm. Courtyard Marriott, 4422 Y Street, Sacramento, CA.

**Nov. 25** - Deadline to submit bulletin articles to the Editor for the December issue of *The Legal Eagle*.

**Nov. 28** – Thanksgiving Day. All state and federal courts closed. No mail service.

**Nov. 29** – State courts closed; federal courts open; mail service operational.

### **December\***

Dec. 9 – SLSA Executive Board Meeting, 5:30 pm, Greenberg Traurig, 1201 K Street, Suite 1100, Sacramento, CA. All members welcome.

Dec. 12 – SLSA Mock Trial and Ornament Exchange. 5:30 pm. Courtyard Marriott, 4422 Y Street, Sacramento, CA.

Dec. 16 - Deadline to submit bulletin articles to the Editor for the January issue of *The Legal Eagle*.

Dec. 25 – Christmas Day. All state and federal courts closed. No mail service.

*\*Be sure to check local court websites for special court closure periods or early closure days during the holiday season.*

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Submitted by Astrid Watterson, CCLS

Have you ever wondered why the Chair doesn't usually vote, make motions, etc.? Below are some questions and answers about the Chair's role in these instances, according to Robert's Rules of Order.

Q: Can the Chair vote?

A: The Chair has the right to vote, and does so in small boards of not more than about a dozen members present. In larger assemblies, the Chair (who has a duty to maintain an appearance of impartiality) may vote when his vote would affect the outcome: to make or break a tie or to make or prevent a two-thirds vote, or when the vote is by ballot (at the same time as everybody else).

Q: In the event of a tie vote what are the Chair's duties or options?

A: On a tie vote, a motion requiring a majority vote for adoption is lost, since a tie is not a majority.

If the presiding officer is a member of the assembly, he can vote as any other member when the vote is by ballot. In all other cases the presiding officer can (but is not obliged to) vote whenever his vote will affect the result -- that is, he can vote either to break or to cause a tie; or, in a case where a two-thirds vote is required, he can vote either to cause or to block the attainment of the necessary two thirds.

The Chair cannot vote twice, once as a member, then again in his capacity as presiding officer. In an appeal from the decision of the Chair, a tie vote sustains the Chair's decision, even though his vote created the tie, on the principle that the decision of the Chair can be reversed only by a majority.

Q: Can the Chair make motions?

A: Yes, the Chair has the same RIGHT to make a motion as any other member. In small boards of not more than about a dozen members present, the Chair usually participates the same as other members. However, in larger assemblies, the Chair has a duty to remain impartial, so would usually not make a motion directly. The Chair could say, for example, "The Chair will entertain a motion to..." and then wait for a member to make it, or "Is there a motion to suspend the rules that interfere with hearing the speaker at this time?"

The Chair may also assume a motion, as in: "If there are no [further] corrections, the minutes stand approved as read [or corrected]," or "If there is no further business to come before the meeting, this meeting will now adjourn. [Pause] Hearing none, this meeting is adjourned."

So you see, without actually directly making a motion, the Chair can accomplish pretty much the same thing without blatantly compromising his or her impartiality. Another option is to ask someone before the meeting to make a motion that the Chair wishes to be considered. After all, the Chair is a member, too, and has just as much right to have things go their way as any other member. Accepting the job of Chair does not remove any rights as a member.

Q: Can the Chair enter into debate?

A. In small boards of not more than about a dozen members present, yes. In larger assemblies, if the Chair wishes to debate, he/she should relinquish the Chair to the Vice President or another member until the matter is disposed of before resuming the Chair.

## LSI CODE OF ETHICS

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

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





### Submitted by Dawn Forgeur, CCLS

We are halfway through the fiscal year and nominations for the SLSA Executive Board are quickly approaching. My report this month will describe what I do as Governor for SLSA.

SLSA's Bylaws describe the duties of Governor as:

It shall be the duty of the governor to attend all meetings of LSI conferences to act as a representative of this Association and to make a written report to the Association at the next regular meeting and to perform such other duties as ordinarily pertain to this office.

The Governor attends every LSI conference—there are four each fiscal year—and attends the various functions and meetings at these conferences. A typical schedule for a quarterly conference is:

#### Friday

6:30pm – 8:00pm Reception

#### Saturday

9:00am – 10:30am Board of Governors Meeting – 1st Session

12:15pm – 1:30pm Governors' Luncheon

2:00pm – 4:00pm Board of Governors Meeting – 2nd Session

6:30pm – 7:30pm Reception

7:30pm – 10:00pm Banquet

#### Sunday

9:00am – 11:00am Brunch and Board of Governors Meeting – 3rd Session

This schedule omits the various educational classes that are offered on Friday and Saturday. The President typically asks that the Governor attend one or two of these classes if possible.

As Governor, you are part of the SLSA's Executive Board and you attend all of the Board meeting and dinner meetings. The Board meetings is when most of the business of the Association is completed. You are the contact between LSI and SLSA; as such, you get notice of any upcoming motions that will be voted on at conference that may affect SLSA.

The Governor also keeps track of the Association's Chapter Achievement Points, works with the Executive Board on the donations for the boodle "goodie" bags for each conference, and of course write a report each month for the bulletin.

Please feel free to email me any questions if you are interested in running for Governor – being a part of SLSA is one of the best things that I've ever done and I have met so many colleagues, both within our community and statewide, with the same goals and desire to be the best in our chosen field!





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**COURT UPDATES 2014**

Many New Changes You Will Not Want To Miss!  
 (Forms, Handouts, Information & Networking)

**EXHIBITORS!!!**

**DOOR PRIZES!!!**

**THURSDAY, JANUARY 16, 2014**

No-Host Bar: 4:45 p.m. to 6:45 p.m.

Dinner: 6:15 p.m.

**Cost: SLSA Members: \$40 before January 6, 2014 (add \$5 after**

**January 6, 2014**

**Non-Members: \$45 before January 6, 2014 (add \$5 after**

**January 6, 2014**

**SLSA has gone green!**  
 Each attendee will receive  
 a CD containing the  
 speakers' handouts.

**Cancellations must be made 72 hours in advance for a refund. No-shows will be billed!!**

Location: HILTON — SACRAMENTO ARDEN WEST LOCATION  
 2200 Harvard Street (located at Business 80 and Arden Way West) Sacramento  
*Parking will be validated for all attendees*

**Speakers: Court Clerks/Executive Officers from numerous counties.**

Day In Court Chairs: Deseree Gamayo ([dgamayo@stonegraves.com](mailto:dgamayo@stonegraves.com)) Phone: 916-231-0321  
 Crystal Rivera ([crivera@somachlaw.com](mailto:crivera@somachlaw.com)) Phone: 916-469-3813  
 Kim Smith ([smithkim@gtlaw.com](mailto:smithkim@gtlaw.com)) Phone: 916-868-0646

Please mail or email your registration form with your check, or you may register online at [www.slsa.org/events](http://www.slsa.org/events).

Name: \_\_\_\_\_ CCLS? Yes \_\_\_ No \_\_\_  
 Address: \_\_\_\_\_ MCLE? Yes \_\_\_ No \_\_\_  
 Phone Number: \_\_\_\_\_  
 E-Mail: \_\_\_\_\_

Are you interested in SLSA membership?  Yes or  No  
 If you are a member of a local LSI association, please state the name: \_\_\_\_\_ LSA/LPA  
 Are you an LSI Officer or Chair? \_\_\_\_\_ If so, in which capacity? \_\_\_\_\_

**Three-course meal including salad , entrée, dessert, coffee/tea. Please indicate your meal preference:**

- \_\_\_\_\_ Spice Crusted Tri-Tip with Smokey Whiskey Reduction, Herb Roasted Red Potatoes, Fresh Vegetables
- \_\_\_\_\_ Chicken Rosemary – Seared Chicken Breast with Natural Garlic Au Jus and Lemon slices, Herb Roasted Red Potatoes, Fresh Vegetable Du Jour
- \_\_\_\_\_ Stuffed Manicotti with Creamed Spinach and Two Cheeses, Ribboned with Pesto Cream Sauce & Marinara

Food allergies: \_\_\_\_\_

**Mail Registration and Check (made payable to SLSA) to:**

Paula Lockard, CCLS,  
 Registration/Reception Chair 2013-2014  
 c/o Sacramento City Attorney's Office  
 915 "P" Street, 4th Floor  
 Sacramento, CA 95814  
 E-mail: [reservations@slsa.org](mailto:reservations@slsa.org)

If you cannot attend this event, but are interested in membership, please contact President Lynne Koroush, [koroushl@gtlaw.com](mailto:koroushl@gtlaw.com).

SLSA, a local association of Legal Secretaries, Incorporated, 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 at least 1.0 hours.



# The Survivors - A Mayan Adventure



LSI November Quarterly Conference 2013

November 15-17, 2013



## Conference Registration Form

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

Mailing address: \_\_\_\_\_

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

Home telephone: \_\_\_\_\_ Work telephone: \_\_\_\_\_

E-Mail address: \_\_\_\_\_

**SCRIP** (includes registration, reception, banquet and brunch)

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

State Officer \_\_\_\_\_

State Chairman \_\_\_\_\_

**Please check if you are:**

Governor  CCLS  PLS

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

POSTMARKED ON OR BEFORE 10/16/13 \_\_\_\_\_ @ \$ 110.00 \$ \_\_\_\_\_

POSTMARKED ON OR AFTER 10/17/13 \_\_\_\_\_ @ \$ 120.00 \$ \_\_\_\_\_

**INDIVIDUAL TICKETS**

Registration by 10/16/13 \_\_\_\_\_ @ \$ 15 \$ \_\_\_\_\_

Registration after 10/16/13 \_\_\_\_\_ @ \$ 25 \$ \_\_\_\_\_

Welcome Reception (Friday) \_\_\_\_\_ @ \$ 20 \$ \_\_\_\_\_

Presidents' Lunch (Saturday) \_\_\_\_\_ @ \$ 30 \$ \_\_\_\_\_

Governors' Lunch (Saturday) \_\_\_\_\_ @ \$ 30 \$ \_\_\_\_\_

Membership Lunch (Saturday) \_\_\_\_\_ @ \$ 30 \$ \_\_\_\_\_

Banquet (Saturday) \_\_\_\_\_ @ \$ 43 \$ \_\_\_\_\_

Brunch (Sunday) \_\_\_\_\_ @ \$ 38 \$ \_\_\_\_\_

TOTAL AMOUNT: \$ \_\_\_\_\_

Dinner Choice:  *Pollo a la Plancha*  *Fillet of Salmon*  *Vegetarian (Pasta Primavera)*

*Chicken: Pan-Seared Chili Rubbed Chicken Breast, Sofrito & Black Bean Chorizo Risotto*

*Salmon: Ginger, Mango & Granola Crusted Atlantic Salmon, Shallot, Tarragon, Citrus Coulis, Garlic Spinach, Yukon Mashed Potatoes*

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

Make checks payable to "LBLPA 2013 CONFERENCE FUND"

Registration Chair: Alice M. Widmark, CCLS, 1016 W. Santa Cruz, San Pedro, CA 90731

310-547-0965 or e-mail: amwcccls@sbcglobal.net

**NO REFUNDS AFTER NOVEMBER 1, 2013**



# THE SURVIVORS - A MAYAN ADVENTURE



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LSI Quarterly Conference - November 15 - 17, 2013**

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- 🌿 37" HDTV flat-screen TVs, digital TV programming with on-demand, complimentary HBO
- 🌿 AM/FM CD clock stereos with MP3/iPod adapters
- 🌿 In-room electronic safes sized to fit laptops
- 🌿 Coffeemaker with complimentary coffee and tea, in room upscale snack and beverage selection
- 🌿 \$5.00 day parking/\$10 overnight parking
- 🌿 Pet friendly

**CHAPTER ACHIEVEMENT REPORTING FORM 2013-2014**

Each association in LSI participates every year in the Chapter Achievement Points (CAPs) contest, and these points are tracked by SLSA's Governor. This covers activities from April 1, 2013, through March 31, 2014.

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

**Date of Event**

**Event**

- \_\_\_\_\_ I submitted an article to *The Legal Secretary* magazine. (50 points)
- \_\_\_\_\_ I attended an LSI Quarterly or Annual Conference. (50 points)
- \_\_\_\_\_ I attended an Officer/Chairman Workshop at the Annual Conference.  
How many? \_\_\_\_\_ (25 points)
- \_\_\_\_\_ I rented a car through Hertz with the LSI discount. (200 points)
- \_\_\_\_\_ I took the CCLS exam – Test Date: \_\_\_\_\_. (100 points)
- \_\_\_\_\_ I passed the CCLS exam – Test Date: \_\_\_\_\_. (200 points)
- \_\_\_\_\_ I recertified as a CCLS during the 2013-2014 fiscal year. (50 points)
- \_\_\_\_\_ I attended another association's monthly meeting, installation, or other function. (50 points)
- \_\_\_\_\_ I attended an educational workshop or seminar sponsored by SLSA or another local  
association. (25 points)
- \_\_\_\_\_ I attended an educational workshop or seminar sponsored by a Forum, CEB, or  
The Rutter Group. (25 points)
- \_\_\_\_\_ I am a member of at least one Legal Specialization Section. (50 points)
- \_\_\_\_\_ I am a member of all six Legal Specialization Sections as of March 31, 2014. (100 points)
- \_\_\_\_\_ I attended a Legal Specialization Section Seminar at Quarterly or Annual  
Conference. How many? \_\_\_\_\_. (50 points per seminar)
- \_\_\_\_\_ I submitted an article for use in a Legal Specialization Section newsletter. (50 points)
- \_\_\_\_\_ I purchased the *Legal Professional's Handbook* (LPH). (200 points)
- \_\_\_\_\_ I purchased the *Law Office Procedures Manual* (LOPM). (200 points)
- \_\_\_\_\_ I purchased updates to the LPH. (100 points)
- \_\_\_\_\_ I purchased updates to the LOPM. (100 points)

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

Sacramento LSA  
Attn: Dawn R. Forgeur, CCLS, Governor  
Stoel Rives LLP  
500 Capitol Mall, Ste. 1600  
Sacramento, CA 95814

## Law Office Products and Management: A Costly Reminder Regarding Service by Facsimile

Submitted by Dawn R. Forgeur, CCLS

An attorney in one of our member's office was reviewing tentative rulings and happened upon a tentative from Judicial Officer Tari Cody in Ventura County Superior Court. The tentative ruling was regarding a Motion to Specially Set Case for Trial. The motion was denied, stating that service of the motion was ineffective. (See *Ventura County's tentative ruling, at right.*) The motion was fax served – which is only permitted where the parties have a written agreement. Additionally, the proof of service must include:

- Time
- Date
- Sending fax number

California Rules of Court, rule 2.306(h)(1).

- A statement that the transmission was reported as complete and without error.

California Rules of Court, rule 2.306(h)(3).

- A copy of the transmission report and state that the report was properly issued by the sending fax machine.

California Rules of Court, rule 2.306(h)(4).

As legal staff, it is our job to either know these rules or look them up to make sure that we are serving documents properly to avoid situations such as having to completely re-notice a motion hearing date. In the above instance, it took a painfully embarrassing and costly ruling from the court to serve as a reminder!



EVENT DATE: 09/06/2013

JUDICIAL OFFICER: Tari Cody

SUPERIOR COURT OF CALIFORNIA,  
COUNTY OF VENTURA, VENTURA DIVISION

TENTATIVE RULINGS

EVENT TIME: 08:20:00 AM, DEPT.: 21

CASE NUM: 56-2012-00427951-CU-PO-VTA

CASE TITLE: ELLEN MUSE VS CRISTOBAL ROSARIO

CASE CATEGORY: Civil - Unlimited

CASE TYPE: PI/PD/WD - Other

EVENT TYPE: Motion - Other (CLM) - to Specially Set Case for Trial

CAUSAL DOCUMENT/DATE FILED: Motion - Other, 08/12/2013

Motion is denied. Service of the motion was ineffective.

Service by fax is only permitted where the parties have a written agreement for service by fax.

(CCP § 1013(e); CRC 2.306(a).) No such agreement has been shown.

Even if the parties do have an agreement, the proof of service must include the time, date and sending fax number (CRC Rule 2.306(h)(1).) The proof of service also must include a statement that the transmission was reported as complete and without error. (Rule 2.306(h)(3).) The proof of service must include a copy of the transmission report and state that the report was properly issued by the sending fax machine. (Rule 2.306(h)(4).) Absent compliance with these requirements, service was ineffective. (Rule 2.306(h)(5).)

## Vendor Spotlight: HG Deposition and Litigation Services

Submitted by Lynne Koroush



Audrey Murray, Lisa Goucher,  
and Lynne Koroush

What a pleasure it was to have Audrey Murray and Lisa Goucher from HG Deposition & Litigation Services with us as October's Vendor of the Month! HG Litigation Services, LP ('HG') is a court reporting firm that specializes in a personalized approach from deposition to trial. They are known for their attention to detail, customized and responsive help, state-of-the-art deposition, trial preparation services, and competitive pricing.

Since 1979, HG Litigation Services has expanded into 10 locations and employed more than 5,000 Certified Court Reporters worldwide, most of whom are legal professionals with an average tenure of 15 years. HG has carved a unique niche in the industry and created a family atmosphere that transcends into their personalized client service. Their dedicated team of litigation support specialists and certified court reporters are ready to assist in all aspects of deposition services, video/multimedia services, copying and scanning services, and trial support.

Thank you again to Audrey and Lisa, and all the folks at HG Deposition & Litigation Services! You can schedule your deposition or court reporter needs online at [www.hglitigation.com](http://www.hglitigation.com), or call toll-free, 1-888-656-DEPO.

**PLEASE REMEMBER TO SUPPORT OUR VENDORS, BECAUSE THEY SUPPORT US!!**

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From wide-ranging deposition services, to seamless records retrieval, to state-of-the-art videography and multimedia services, to our extended offerings through Trial Resource® HG is the source for all of your legal needs.

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- Records Retrieval
- Multimedia Services
- Trial Resource®

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San Francisco, California 94104

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Deposition and  
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LEGAL SECRETARIES, INCORPORATED

## BEGINNING LEGAL SECRETARIAL TRAINING CLASS

January 6 – February 17, 2014

LSI will be offering its Beginning Legal Secretarial Training Class online. The first session will be a six-week, work-at-your-own-pace online session commencing January 6 and ending on February 17, 2014. During the classes, the following topics will be covered:

Introduction to the Law Office	Transcription and Proofreading Techniques
Duties of the Legal Secretary	Court Structure
Effective Telephone Skills	Citations
Effective Oral Communication Skills	Service of Legal Documents
Effective Written Communication Skills	Preparation of Documents Filed with the Court
Calendaring and Timetables	Basics of Civil Litigation
Basic Grammar Skills	

### CLASSES BEGIN MONDAY, JANUARY 6, 2014

Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the class.

The cost of the training class, which includes the Legal Secretary's Reference Guide, is \$150 for LSI members and \$200 for non-LSI members. This introductory price is for this session only. Each individual must register separately. Upon completion of the class, students will receive a certificate from LSI.

---

### BEGINNING LEGAL SECRETARIAL TRAINING CLASS REGISTRATION

(Please type or print clearly)

Name: \_\_\_\_\_ Association: \_\_\_\_\_ LSA/LPA

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

Daytime Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

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

Payment: Check # \_\_\_\_\_  
Credit Card # \_\_\_\_\_  
Exp. Date: \_\_\_\_\_ 3-digit CVV No.: \_\_\_\_\_ Zip Code: \_\_\_\_\_

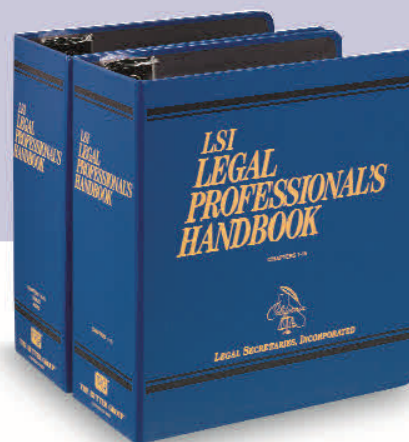
Email registration form NO LATER THAN December 30, 2013, to Shaylene Cortez, CCLS, LSI Legal Secretarial Training/Seminar Chair, [training@lsi.org](mailto:training@lsi.org) or mail to: LSI, P. O. Box 660, Fortuna, CA 95540-0660. Checks should be made payable to LSI. For further information or inquiries, email [training@lsi.org](mailto:training@lsi.org). We will be offering additional sessions commencing in March 2014. No refunds after January 6, 2014.

*LSI – Educating California's Legal Professionals*

**LEGAL SECRETARIES, INCORPORATED**

# LEGAL PROFESSIONAL'S HANDBOOK FOR CALIFORNIA LAW PRACTICE

compiled by Legal Secretaries, Incorporated  
published by The Rutter Group



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- Pretrial and Judgment in Civil Actions
- Postjudgment Proceedings
- Civil Appeals and Writs
- ADR
- Foreclosures: Mortgages and Trust Deeds; Mechanic's Lien
- Unlawful Detainer
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- Bankruptcy
- Family Law
- Adoptions
- Criminal Law and Procedure
- Probate Proceedings: Decedents' Estates; Guardianships/Conservatorships; Trust Law
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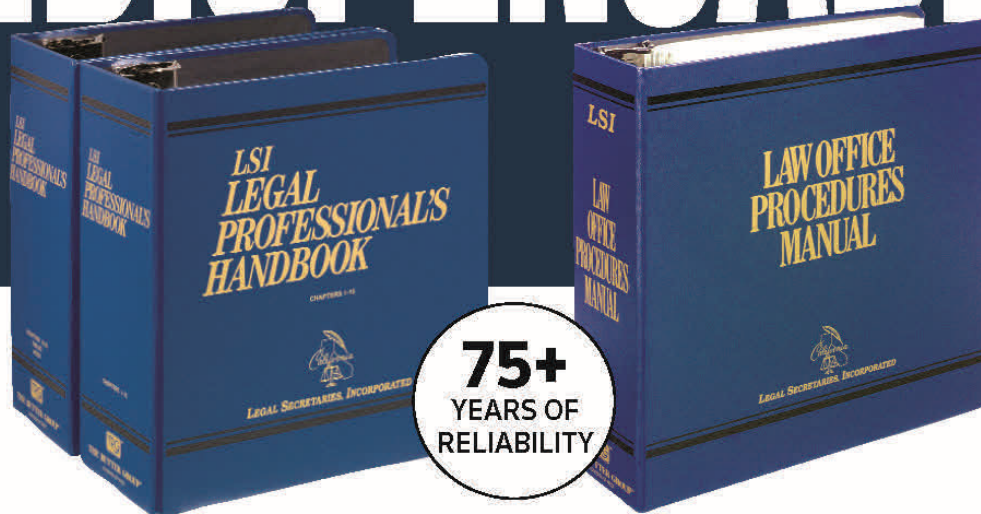
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**LEGAL SECRETARIES, INCORPORATED  
MEMBERSHIP LIST AS OF 07/31/13**

Total Members (Fiscal Year-end 4/30/13)	Association		New Members	Transfer Members	Continuing Members	Total Members
41	Alameda County	LSA	5		35	40
0	Antelope Valley	LSA	0		0	0
47	Beverly Hills/Century City	LSA	0		35	35
12	Butte County	LPA	0		11	11
0	Capitol City	LPA	0		0	0
15	Conejo Valley	LPA	3		14	17
25	Desert Palm	LPA	2		11	13
13	El Dorado County	LPA	4		8	12
61	Fresno County	LPA	16		43	59
36	Humboldt County	LPA	3		28	31
32	Imperial County	LPA	15		10	25
38	Livermore-Amador Valley	LPA	1		32	33
66	Long Beach	LPA	6		44	50
56	Los Angeles	LSA	9		44	53
24	Marin County	LPA	4		16	20
46	Merced County	LPA	2		32	34
0	Monterey County	LSA	0		0	0
64	Mt. Diablo	LPA	7		46	53
12	Napa County	LSA	1		12	13
87	Orange County	LSA	7		50	57
0	Palo Alto	LSA	0		0	0
23	Placer County	LPA	5		17	22
4	Redding	LPA	0		0	0
16	Rio Hondo District	LPA	5		13	18
26	Riverside	LPA	2		16	18
162	Sacramento	LSA	18		106	124
234	San Diego	LSA	23		144	167
52	San Fernando Valley	LSA	6		34	40
61	San Francisco	LPA	8		40	48
45	San Gabriel Valley	LSA	4		25	29
78	San Mateo County	LSA	5		55	60
24	Santa Barbara	LPA	3		18	21
108	Santa Clara County	LSA	13		55	68
8	Santa Cruz County	LPA	0		6	6
16	Santa Maria	LPA	5		10	15
40	Sonoma County	LSA	4		26	30
11	Southern Butte	LSA	0		7	7
39	Stanislaus County	LPA	0		35	35
38	Stockton-San Joaquin	LPA	0		24	24
4	Trinity County	LSA	0		4	4
22	Ventura County	LPA	0		16	16
47	Members at Large					30
1733	<b>YTD TOTALS</b>					<b>1338</b>

FIRST QUARTER MEMBERSHIP LIST Final 07-31-13.xls



# FOR SALE!

Sacramento Legal Secretaries Association is selling 2 GB flashdrives as part of its Ways and Means project this year. Help support SLSA and purchase your flashdrive today. They will be sold at the general meetings or you may contact SLSA Governor Dawn Forgeur, CCLS, at [drforgeur@stoel.com](mailto:drforgeur@stoel.com).

**\$10 EACH**



## 2013-2014 Committee Chairmen

### SLSA Officer & Chair Positions 2013-2014

Position	Name	Contact Info
President	Lynne Koroush	koroushl@gtlaw.com
Vice President		
Secretary	Jennifer Estabrook, CCLS	jestabrook@meyersnave.com
Treasurer	Maryanna Rickner	mrickner@scoe.net
Governor	Dawn Forgeur, CCLS	drforgeur@stoel.com
Parliamentarian	Astrid Watterson, CCLS	awatterson@somachlaw.com
Executive Advisor	Dawn Forgeur, CCLS	drforgeur@stoel.com
Advertising	Elizabeth Madden, CCLS	elizcccls@gmail.com
Audit (Financial Review)		
Benefits	Kim Smith	kimncali40@sbcglobal.net
Budget Committee	Alex Cain	acain@nationwideasap.com
Bulletin Editor	Corene Rodder	<a href="mailto:rodderc@gtlaw.com">rodderc@gtlaw.com</a>
CCLS	Launa Atkinson, CCLS	latkinson@donahuedavies.com
Charitable Projects	Rebecca Lerma	rmlerma@stoel.com
Day In Court	Deseree Gamayo (Chair) Crystal Rivera (Co-Chair)	dgamayo@stonegraves.com <a href="mailto:crivera@somachlaw.com">crivera@somachlaw.com</a>
Employment	Jaymie Moralez	jmoralez@somachlaw.com
Historian	Jennifer Chastain	chastainj@gtlaw.com
Interclub	AVAILABLE	
Law Office Products & Management	AVAILABLE	
Legal Procedures	Debbie Frias, CCLS	<a href="mailto:dfrias@crowlawoffices.com">dfrias@crowlawoffices.com</a>
Legal Professional of the Year/Boss of the Year	AVAILABLE	
Legal Secretarial Training	Dawn Forgeur, CCLS Astrid Watterson, CCLS	<a href="mailto:drforgeur@stoel.com">drforgeur@stoel.com</a> <a href="mailto:awatterson@somachlaw.com">awatterson@somachlaw.com</a>
Marketing		
Membership		
Nominations & Elections	Jaymie Moralez	jmoralez@somachlaw.com
Professional Liaison	Lynne Koroush	koroushl@gtlaw.com
Programs	AVAILABLE	
Programs – Lunch Lessons	Anne French Dawn Forgeur, CCLS	<a href="mailto:afrench@downeybrand.com">afrench@downeybrand.com</a> <a href="mailto:drforgeur@stoel.com">drforgeur@stoel.com</a>
Publicity	Mary Taylor	otoe1@hotmail.com
Reservations/Reception	Paula Lockard, CCLS	plockard@cityofsacramento.org
Scholarship	Anne French	afrench@downeybrand.com
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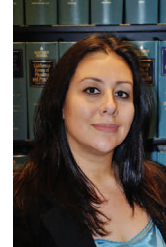
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