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### President

**Astrid Watterson, CCLS**  
Somach Simmons & Dunn  
500 Capitol Mall, Suite 1000  
Sacramento, CA 95814  
(916) 446-7979  
[awatterson@somachlaw.com](mailto:awatterson@somachlaw.com)

### Bulletin Editor

**Liz Gideon**  
Weintraub Genshlea Chediak  
400 Capitol Mall, 11th Floor  
Sacramento, California 95814  
(916) 558-6086  
[lgideon@weintraub.com](mailto:lgideon@weintraub.com)

## Sacramento Legal Secretaries Association



## Theme of the Month:

# Bankruptcy

### Events

- **Lunch Lesson – October 18.** Topic: “Bankruptcy Procedures.” This event will be held at the law offices of Downey Brand, 621 Capitol Mall, 18th Floor. Please contact Sophia Albov, CCLS at [salbov@cookbrown.com](mailto:salbov@cookbrown.com) if you would like to register. **See page 19.**
- **Dinner Meeting – October 21.** Topic: “The Lifecycle of a Corporation.” This event will be held at the Courtyard Marriott, 4422 Y Street. You can register online through our website or contact Jennifer Shelton at [jshelton@murphyaustin.com](mailto:jshelton@murphyaustin.com). **See page 16.**
- **Fairytale Town – October 22-23.** Monster Mash - We need volunteers. If you would like to help or have any questions, please e-mail Jennifer Estabrook at [je@wexlervallace.com](mailto:je@wexlervallace.com) or Ron Bodenmann at [ron@capitol-digital.com](mailto:ron@capitol-digital.com). **See page 7.**
- **Evening Seminar – October 26.** Topic: “Basic Summation Training.” This event will be held at the law offices of Downey Brand, 621 Capitol Mall, 15th Floor. Please contact Sophia Albov, CCLS at [salbov@cookbrown.com](mailto:salbov@cookbrown.com) if you would like to register. **See page 28.**

## Mission Statement

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

NON-MEMBERS ARE WELCOME!



## President's Report

by Astrid Watterson, CCLS



Astrid Watterson, CCLS

Greetings! September has gone by about as quickly as I had thought it would. We have completed the first half of our fiscal year – amazing! The next few months will bring with it a few of our favorite events and few new ones. October is upon us. This month, our “fun event” is our annual participation in Fairytale Town’s Halloween event. Jennifer Estabrook, CCLS, and Ron Bodenmann are leading this event. The theme is “Monster Mash.” A flyer can be found in the bulletin, but we are looking for a few donations of items and time from all of you. We anticipate approxi-

ceeding.

This month is also the month to take the California Certified Legal Secretary exam. We are cheering for any of our colleagues or members taking the exam in October! The Beginning Legal Secretary nine-week course, has also ended. There were 11 brave souls who took the exam and finished the course. The instructor, Desiree Delonia, CCLS’ report is enclosed. However, before I move on to the remainder of October, I did want to take a moment and acknowledge Desiree for taking on the Be-

port. What a great team of ladies. Many thanks to Desiree and Liz for helping another group of people learn more about the legal field and try to become better at their jobs.

We may have ended another study course, but the grammar classes are still going strong. Sorry, but the classes remain sold out through February. Those of you who registered, congrats on continuing to work through the oodles of Gregg grammar rules. Stick with it though, because ultimately we all develop a love-hate relationship with Gregg. His rules come in

**In the next six months, I urge each of you to think about SLSA and ask yourself if you think you are ready to lead us into the next year.**

~Astrid Watterson, CCLS

*“Coming together  
is a beginning.  
Keeping together  
is progress.  
Working  
together is  
success.”*

~Henry Ford

mately 2,000-3,000 children stopping by King Arthur’s castle, all of whom would like candy. If you can donate a bag of candy or even stop by with your child and support us in this event it would be great. Come dressed as one of your favorite classic monsters, such as Dracula, Frankenstein, the Mummy, etc. I hope to see many of you participating with your family.

As for our educational opportunities, we are offering seminars in bankruptcy and corporations. We hope to be able to have a speaker cover the birth of a corporation. How to start one from the beginning and what is involved in doing so. We also have a speaker who will cover the basics of bankruptcy and what is required of a legal professional in a bankruptcy pro-

cessing Legal Secretary course. It is not as easy as one may think to teach a class and make sure that you convey the items needed in a method that students can understand it and have fun learning it. Desiree did a fantastic job! Personally, I started teaching this course many years ago with Cyrene Farrell, CCLS, and then I went on to teach it by myself, and then I found my partner in crime, Dawn Forgeur, CCLS. Dawn and I have been teaching the BLS course for many years now. I speak for both Dawn and I, when I say that we were relieved to have found such a competent instructor. Of course, she did not make the journey alone. Liz Gideon, our bulletin editor and friend, helped Desiree grade the assignments and provided much needed sup-

port. What a great team of ladies. Many thanks to Desiree and Liz for helping another group of people learn more about the legal field and try to become better at their jobs.

As we end a few of our projects, we begin a few others. Our Mock Trial is around the corner. John Baldwin has written yet another fun mock trial. A flyer with a cast call will be included in next month’s bulletin. Due to our hectic holiday schedules, we do not have a general meeting in December. Instead, we have our mock trial and exchange ornaments. I do hope that we are able to have many of you participate in this event as well. Rebecca Lerma and her team will be in charge of this event and I’m sure it will be another success story for SLSA.

Aside from all the fun stuff, we also have professional



## President's Report (cont.)

by Astrid Watterson, CCLS

changes which will take place in a few months. The law typically changes in January and July. This year for our Day in Court event, we want to focus on certain topics and aspects of how the courts are run and how they deal with certain situations/filings. In order to make this event a little more educational for our members, we need your input. What questions do you have and for what court? What knowledge about procedure within a specific court do you wish you had that would make your life easier? The purpose of this event is to make sure that changes in local rules, local court procedure, and overall court administration issues are addressed and that we are informed of such changes. In the past, we have asked the court executive officers to attend our event and let us know what changes their courts are experiencing or will experience, but often times, I have heard that this is not sufficient for our members. If we want to make this a better event, we need your

input and participation. When I ask for participation, it does not always mean that you have to physically be there, or that you have to open your wallet and donate money; it simply means, take a moment, think about what you want and ask us about it, offer your opinion, give positive suggestions and feedback. These are the items that allow the board and the chairmen to help address and focus the events to better fit your needs. I hope that Rebecca and her team are inundated with suggestions for both our Day in Court event in January and our Federal Day in Court in February.

Many events have been accomplished already, but that doesn't mean it is over yet. We still have a few more events and learning opportunities to bring to you. As a team, everything is possible. As we move along into the next half of the year, we also need to start thinking about the future, specifically, the future of our association. The election process

will be held in February – have you thought of running for office? Who will be our next leaders? What do you hope to gain from our association and what can you do to give back? We have been fortunate to have a great team this year, but that is not guaranteed. We are able to offer many opportunities this year, but next year we may not be able to. This association is based on volunteers. Each year is different. In the next six months, I urge each of you to think about SLSA and ask yourself if you think you are ready to lead us into the next year. For now, we move onward and forward to accomplish the goals we set for ourselves in the beginning. We will be successful in achieving them, because we are an awesome group of legal professionals! Enjoy your October edition of *The Legal Eagle!*

"The election process will be held in February - have you thought of running for office?"

~Astrid Watterson, CCLS

## Benefit Highlight

by Dawn Forgeur, CCLS

SLSA members can take advantage of Working Advantage through LSI's membership. If you would like to take advantage of these discounts, please e-mail Patti Alexander for the member code at [palexander@aklandlaw.com](mailto:palexander@aklandlaw.com).

Some of the fall specials through Working Advantage are:

FTD.com - save 20% on your order

Shoebuy.com - 10% off and free shipping

MyWinesDirect.com - 20% off your order

Receive admission to LEGOLAND® California, SEA LIFE™ Aquarium, and LEGOLAND Water Park for one low price. Adult/Child

Ticket Member Price: \$65.00 (Regular price\*: \$87.00 Adult; \$77.00 Child/Senior). Ticket comes with a 2nd day FREE to all three attractions. **Both visits must be used before 12/31/10.** Water Park is open seasonally and requires same day use as LEGOLAND visit.



## Membership Chair Report

by Anne French

*Hello everyone. We are almost halfway through our year already and the holidays are right around the corner. We have our Fairytale Town event this month and can use as many volunteers as possible. So come out and help give back to the community.*

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

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

**LISELDA ARREOLA** – Liselda is a case manager with Child & Gordon. She has been a legal professional since January 2009. Liselda celebrates her birthday on May 1. She specializes in administrative law, litigation, and personal injury. Liselda enjoys hiking, biking, snowboarding, reading, and cooking.

**IRINA BUROCHEK** – Irina is an assistant/AP for Child & Gordon. She has been a legal professional since January of 2008. Irina celebrates her birthday on April 16. She specializes in personal injury.

**ALEXANDER CAIN** – Alexander is court staff for Nationwide Legal. He has been a legal professional since June of 2005. Alexander celebrates his birthday on August 21. He specializes in legal support. Alexander enjoys the outdoors.

**JEANETTE GEORGIANNA** – Jeanette is a legal secretary with Downey Brand LLP. She has been a legal professional since 1988. Jeanette celebrates her birthday on March 21. She specializes in litigation. Jeanette enjoys music, reading, and traveling.

**GUILLERMO "MOE" TALAMANTES** – Moe is an office manager with Nationwide Legal. He has been a legal professional since February of 2001. Moe celebrates his birthday on January 23. He specializes in legal support and attorney services. Moe enjoys road trips and playing with his kids.

**MICHAEL TARABAN** – Michael is a sales manager with Nationwide Legal. He has been a legal professional since 1995. Michael celebrates his birthday on April 27. He specializes in sales. Michael enjoys playing the guitar, sports, and cycling.

**CHRISTINA VEGA** – Christina is a legal secretary with the Law Offices of Michael Loewen. She has been a legal professional for six years. Christina celebrates her birthday on February 3. She specializes in litigation and personal injury.

*Are you an SLSA member who has changed jobs? Been promoted? Recently engaged or married? New addition to the family? We want to know about you. Let us celebrate your accomplishments with you during good times and support you during tough times. Please send your news to [afrench@downeybrand.com](mailto:afrench@downeybrand.com).*

## Membership Announcement

provided by Brooke Atherton, CCLS

Members of LSI: It is with heavy heart that I share with you the passing of George H. Allen, Attorney at Law. Mr. Allen was an Honorary Member of LSI and husband to LSI Past President Suzanne M. Allen, PLS, LSI Past President 1978 - 1980. Mr. Allen was an attorney with the law firm of Allen & Kimbell, LLP, in Santa Barbara, California.

Mr. Allen passed away on Saturday, September 18, 2010, after complications from a fall. No services are planned at this time. Condolences may be sent to Suzanne M. Allen at her home: 1263 La Brea Lane, Carpinteria, CA 93013-1476.



# Of Note

**Did you know**, for Writ of Mandate actions filed in the Sacramento County Court, the judges require TWO complete copies of each document you file? If you want a filed stamped copy returned, then you need to provide an additional copy (that makes an original and three copies). If you're short on copies, your documents will be returned, unfiled.

**Did you know**, effective October 1, 2010, the United States District Court for the Northern District of California Court will change the attorney admission fees to the following: For admission of attorneys to practice, including Certificate of Admission. The new fee is \$275.

# How Do I?

*Question submitted by Rhonda Harrigan*

**QUESTION:** Is there a "rule" or general usage rule about hash marks at the end of a page on a pleading? How many (/, //, ///)? How many lines of slashes (to the end of the page or just 3-5)?

**ANSWER:** The hash marks are no longer required and there are no set rules out there if an attorney does want to use the hash marks. If used, it should be three hash marks (///), but it is up to the secretary or attorney as to how

many lines they would like to use them on.

The biggest concern is making sure that the hash marks do not shift to the next page if text is added.

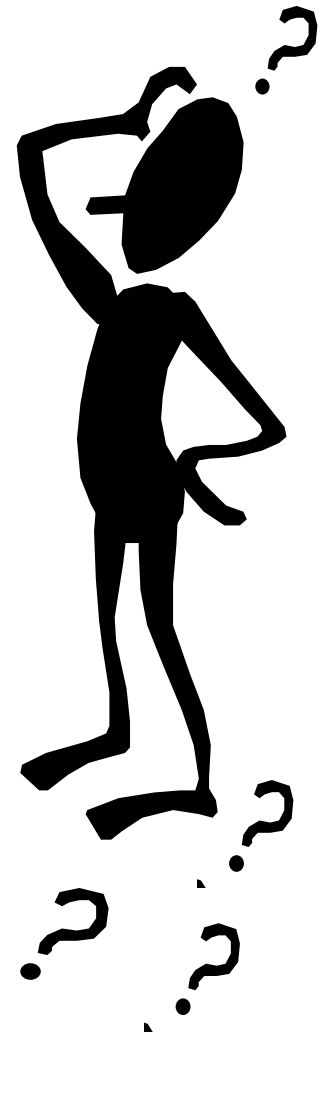
Law Office Procedures Manual, B-17

The main purpose of the hash mark is to show that there is additional text which can be found on the following page.

Do you have a question? Feel free to email your ques-

tions to me and together we can help one another along the way. It doesn't have to be about a legal procedure, it could even be about your cat! If you don't have a question, but would like to share a tidbit of information that helped you, let me know.

lgideon@weintraub.com



August 21, 2010

An open letter to SLSA

Dear Friends:

I am writing to express my gratitude to the members of SLSA for the lovely flowering plant which was sent in honor of my husband, Mel Visger's passing. To those of you who were in attendance at the rosary and/or the funeral mass, I can still see your supportive faces and feel your loving embraces. Please know that you have touched my heart and I will never forget your kindness. Thank you. Thank you. Thank you.

Very sincerely, Jan Ainsworth

# Parliamentarian's Corner

by Astrid Watterson, CCLS

**TEAM =  
Together  
Everyone  
Achieves  
More  
~Author  
Unknown**

A Member's Duty While At a Dinner Business Meeting.

The Sacramento Legal Secretaries Association's dinner meetings are not only intended to provide you with educa-

***"It has been great to see that members who attend the dinner meetings, care enough about this association and how it is run, that they stay until the end." ~Astrid Watterson, CCLS***

tion, but also to keep this association running. The dinner meetings are where we conduct the business of the association. As a member, when you first check in, you should receive: (1) a copy of the minutes; (2) a copy of the

treasurer's report; (3) a red voting card; and (4) a copy of the agenda. Your duty is to review the minutes and the treasurer's report. If you were present at the prior meeting, you are better equipped to

review the accuracy of the minutes. However, if you were not, that doesn't mean that you are excused from reviewing it. Our secretary is good, but we all make mistakes every now and then. Please review it for any type of errors or inaccuracies. When the minutes are addressed, then you can raise your hand, wait to be acknowledged by the chair, and let us know what should be fixed. The treasurer's report requires the same duty of care. It is your responsibility as a member to know what's going on and if you have questions, ask them. It is our duty as board members to provide you with copies of these reports so that you know what the status of our accounts are.

The basic order of business for SLSA is to call the meeting to order, which means

that the meeting has officially begun. It is our goal to have the speaker, the vendor, quizzes, prizes, etc. first and then, since only members can vote, we dismiss all non-members. We then read and

approve the minutes; present the treasurer's report for review; induct new members; present any other reports from the chairmen; deal with any unfinished business; handle any new business (usually items that do not fall under the task of a chairman or other category); and finally, we conclude the meeting. It shouldn't be too taxing and your presence during the members only portion (business meeting) is greatly appreciated. It has been great to see that members who attend the dinner meetings, care enough about this association and how it is run, that they stay until the end.

I hope this helps everyone understand what is expected of a member during the dinner business meetings. Let me know if you have any questions.



## CHANGE OF ADDRESS:

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



Join SLSA in "Dracula's Castle" for

# FAIRYTALE TOWN'S ANNUAL SAFE & SUPER HALLOWEEN: MONSTER MASH!

October 22-23 from 5-9 PM

*We need Volunteers for both nights to help hand out candy and participate in craft projects with the kids. Dress up as your favorite classic monster and come join the fun!*

*We need Donations:*

- Candy! Candy! Candy!
- Black construction paper
- White drawing paper
- Ink pads with washable ink
- Wiggle eyes
- Chalk
- Crayons & markers
- Disposable wipes (for cleanup)
- Glue Sticks

If you can help, please contact:

Jennifer Estabrook – [je@wexlerwallace.com](mailto:je@wexlerwallace.com)  
Ron Bodenmann – [ron@capitol-digital.com](mailto:ron@capitol-digital.com)



A

P

S

**Capturing CAPs (Chapter Achievement Points)**

Did you know that members who attend another association's monthly dinner meeting, SLSA can earn 50 points?

Also, SLSA members who attend another association's workshop or seminar can earn 25 points for SLSA!

If you have rented a car using the LSI Hertz discount (CDP Card #447698) you have also earned SLSA 200 chapter achievement points!

If you have earned SLSA chapter achievement points, please e-mail the Governor, Dawn Forgeur, at [forgeurd@gtlaw.com](mailto:forgeurd@gtlaw.com), and let her know. Each local association in LSI participates in the Chapter Achievement Contest, help SLSA win the contest this year!

**Vendor Spotlight**  
**September Lunch Lesson: Veritext, Jonathan Pearl**



*Pictured from left to right: Jonathan Pearl (Vendor), Kristi Baughman, and Natalie Sahin (Vendor Assistant)*

For September's lunch lesson, we were fortunate to have Jonathan Pearl from Veritext join us. Veritext is a deposition and litigation service company with coverage nationwide. Their corporate headquarters is located in New

service, video streaming on the internet, videography, and video conferencing, as well as your standard court reporters. We thank Mr. Pearl for taking time to be our vendor for September's lunch lesson.

**"better in every case..." ~ Veritext**

Jersey, but they have offices locally in Sacramento. If you find yourself in need of a court reporter, consider using Veritext. Their mantra is "better in every case", and they focus on providing their clients with reliable, on-time service and have access to over 10,000 court reporters and legal support specialists. Veritext is equipped to offer realtime





# Speaker Spotlight

## September Lunch Lesson: "Computer Operations in the Legal Profession,"

**Betty Barth**

*by Sophia Albov, CCLS*



On September 22, 2010, the Sacramento Legal Secretaries Association spent an interesting and educational lunch with Betty Barth, Information Services (IS) Manager of Downey Brand. She spent the lesson teaching us how to better use the tools we already have on our computers and introduced us to some additional useful tools.

The discussion started with a brief look at how far the legal industry has come over the last two decades in its preferred technology. From typewriters to advanced word processors, there is a lot to learn in the technology realm. It is also important to learn how to use a program efficiently and to work with the technology, not against it! She indicated that to operate at the optimum efficiency each firm should establish training programs and a set of best practices for the use of its technology. We also discussed the establishment of core competencies for all members of the firm. If the expectations are laid out for what one

should know and should be aware of, it is easier to establish and measure training programs.

We rounded the lesson out with a discussion of some lesser know, but highly useful programs. For example Message Viewer Plus allows the organization and Bates numbering electronically of e-mail discovery. With this program you can open and view Outlook messages without it adding your metadata to the e-mail (i.e. it will keep the e-mail in its original form so there is no need to go back and redact your information.) We also discussed the underutilization of PowerPoint. Betty showed us how this program is useful for creating timelines and calls outs. You can create highly professional presentations using PowerPoint. The best part is there is lots of free training through the Microsoft Office website!

Betty has worked as the IS Manager for Downey Brand for the last five years. Prior to working in IS she logged 21 years as a litigation legal secretary. She has been working in law since she had a typewriter with carbon sheets and onion skin. This has given her the opportunity to grow and develop with the trends in technology. In her position she manages both the IS Department staff and is the project manager for large software and hardware rollouts. The

number one piece of advice she has for computer users is to never be afraid of trying new things with your computer. She indicated that you will probably not break anything and if you do there is always someone able to fix it. Her parting advice is: "Be brave, click on the Help menu and ask any question you want."



**"Never be afraid  
of trying new  
things with your  
computer."**

**"Be brave, click  
on the Help menu  
and ask any  
question you  
want."**

**~Betty Barth**



**Pictured from left to Right: Betty Barth (Guest speaker) and Kristi Baughman**



# Clothing Drive

On Thursday, September 23, 2010, the Sacramento Legal Secretaries Association teamed up with the Sacramento Valley Paralegals Association to host a clothing drive for Women’s Empowerment, from 6:00 p.m. to 8:00 p.m. at House Restaurant on Capitol Mall which was the site of this epic clothing drive.

Women’s Empowerment is a local non-profit dedicated to ending the cycle of homelessness in women. The organization grew out of Loaves and Fishes and became an independent non-profit organization in 2004. Their mission is: “educating and empowering women who are homeless with the skills and confidence necessary to get a job, maintain a healthy lifestyle, and regain a home for themselves and their children.” To date they have served 621 women and their 658 children.

If you would like to get involved with the program they are always looking for volunteers and donations. They use volunteers to teach classes for the women to help them acquire skills necessary to get and keep gainful employment. You can be a one on one mentor to one of their students, or you can help with resume development. They also accept monetary and clothing donations. Women’s Empowerment was named the 2009 Non-Profit of the Year by the Non-Profit Resource Center.



*From left to right: Sophia Albon, CCLS, Rebecca Lerma, Dawn Forgeur, CCLS, and Crystal Rivera*

**Women's Empowerment**

1400 North C Street  
 Sacramento, CA. 95811  
 916.669.2307

[support@womens-empowerment.org](mailto:support@womens-empowerment.org)

[www.womens-empowerment.org](http://www.womens-empowerment.org)



# Vendor Spotlight

## September Evening Program: 4th Street Grille

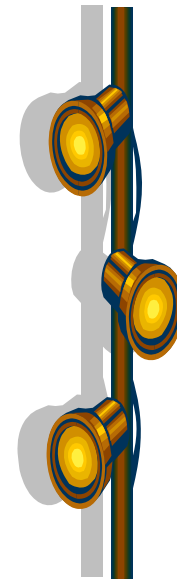
September's evening seminar was hosted by our vendor 4th Street Grille. Many thanks to them for sponsoring another SLSA event. They provided the students of the legal computations and accounting seminar with delicious samples. 4th

Street Grille is located in downtown Sacramento since 1992. The restaurant provides its customers with pastas, salads, fresh seafood, a variety of mesquite grilled meats, vegetarian dishes, and awesome desserts! They are located at the corner of 4th Street

and L Street and you can check them out on their website at:

[www.4thstreetgrille.com](http://www.4thstreetgrille.com).

Again, many thanks to our vendors for supporting our association.



**Success is the ability to go from failure to failure without losing your enthusiasm.**  
 ~Sir Winston Churchill

### Bankruptcy

P S A M O E C C T T H J H R V  
 E E N H I X L R N B G U E Q N  
 T L Q E L A U L E F Q L O W P  
 I U W B I S L G Z D I S G C T  
 T D C D T L R C H E I W A B X  
 I E A E P A L M F I T T U K E  
 O H E W H W A F W O C K O A E  
 N C P C Y T R O H S F A X R S  
 G S S I R O T B E D P O D S V  
 O I A X M E X E M P T I O N B  
 D W O S F O H R A B J A G R N  
 P P T F Y U D R U W C D H V P  
 Y A N O X I Y D A T S U L R U  
 Y M W I H Q M K K S O N G X B  
 Y A T S C I T A M O T U A D L

AUTOMATIC STAY  
 CREDITOR  
 DEBTOR  
 DISCHARGE  
 EXEMPTION  
 LIEN  
 PETITION  
 PROOF OF CLAIM  
 RELIEF FROM STAY  
 SCHEDULES  
 TRUSTEE

▶ LITIGATION COPYING  
 ▶ ELECTRONIC BATES™ NUMBERING  
 ▶ FULL TEXT SEARCHABLE PDF  
 ▶ OCR (OPTICAL CHARACTER RECOGNITION)  
 ▶ LOAD FILES (SUMMATION, CONCORDANCE™, DELIMITED TEXT, ETC)  
 ▶ DIGITAL PRINTS (BLOW-BACKS)

▶ ON-SITE SCANNING  
 ▶ OVERSIZED PRINTS /COURT EXHIBITS  
 ▶ MOUNTING/BINDING  
 ▶ COURT FILINGS /PROCESS SERVING  
 ▶ X-RAY SCANNING /DUPLICATON

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# Employment Report/Positions Available



by Jaymie Moralez

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

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

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

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

## Positions Available:

- **(9/22/10) Records Clerk** RJ Crowell is currently seeking a full time Records Clerk with a minimum of 1-2 years experience in this capacity. 3-5 years of law firm experience is preferred in total. Position is a 37.5-hour work week and will involve some supervisory duties as well. Intangible qualities will include-self motivated, team player, and highly organized. This is a direct hire position with full benefits. E-mail inquiries to [rod@rjcrowell.com](mailto:rod@rjcrowell.com) for immediate consideration. Looking to start position by mid-October!
- **(9/12/2010) Legal Secretary** The City Attorney for the City of Stockton is accepting applications for the position of Legal Secretary. This position will be responsible for providing a variety of confidential, complex and specialized clerical, secretarial, and paraprofessional legal work. Requirements include possession of a high school diploma or GED and three (3) years of secretarial experience in a law office within the last five (5) years performing increasingly responsible and complex clerical work, including: preparations of various pleadings, motions, discoveries, and calendaring. College or business school course work in law office administration is desirable. Final Filing Date: Friday, Oct. 1, 2010, by 5 pm. For detailed info, additional requirements, and to apply on-line, click "Jobs" at [www.stocktongov.com](http://www.stocktongov.com)
- **(8/23/10) Legal Assistant/Secretary** Seeking an experienced civil litigation secretary for a 3 attorney firm. Candidate should have experience in calendaring, court rules, court filings, and communication with court personnel. Proficiency in Abacus, WordPerfect, and forms programs, required. Candidate should be organized, detail-oriented, self-motivated, and able to multi-task and work independently. Please email resumes to Sid Rosenberg [sid@rosenberglink.com](mailto:sid@rosenberglink.com).
- **(5/25/10) Litigation Secretary** Seeking an experienced litigation secretary for a solo attorney. Candidate should be organized, detail-oriented, self-motivated, and able to multi-task and work independently. Experience in word processing/transcription, scheduling, calendaring, and proficiency in Abacus, WordPerfect required. Please contact Tim Bonner at (916) 320-5665.



# CCLS Quiz

by Jennifer Estabrook, CCLS



## Bankruptcy

### True or False:

1. Only a person who resides or has a domicile, a place of business, or property in the United States, or a municipality, may be a debtor under Title 11.

True

False

2. Chapter 9 is only for family farmers or family fishermen.

True

False

3. A debtor in California can choose between either a “federal” or a “state” set of exemptions that prevent certain assets of the estate from being sold by the trustee.

True

False

4. Once granted, a debtor’s chapter 7 discharge cannot be revoked.

True

False

5. The appt of a trustee is mandatory in Chapter 11 cases.

True

False

6. The debtor is required to attend the initial meeting of creditors.

True

False

7. The first meeting of creditors is held before the court.

True

False

8. A Chapter 7 debtor can request their case be converted to a Chapter 11 at any time.

True

False

9. Personal loans, student loans and credit card bills are examples of secured debt.

True

False

10. Chapter 13 is not available to business entities.

True

False



*Answers on page 31*



From left to right: Kristi Baughman and Wendy Lannoye with Atkinson-Baker

The manager accepts the status quo; the leader challenges it.

~Warren Bennis

# Speaker Spotlight

## September General Meeting: "The Role of the Legal Administrator" - Lynn Cole



by Dawn Forgeur, CCLS and Kristi Baughman

The September 16, 2010, dinner meeting featured an overview of the role of the legal administrator in the law firm with Ms. Lynn Cole, President of the Sacramento Valley Association of Legal Administrators. Ms. Cole worked as a legal secretary for eight years before going to graduate school and earning an MBA in marketing and general management. She spent some time in the hotel industry before returning to the legal field as a legal administrator.

She started out her explanation by stating the best description of the role of the legal administrator is "it depends." She further went on to state that this means that "it depends" on the size of the firm, the structure of the firm, and the expectations of the owners of the firm.

The biggest factor in the legal administrator's role is the size of the firm. If the firm is a small to mid-size firm, the legal administrator

might be the only administrator in the firm and, if so, that administrator must be a generalist in the following categories: people, financials, facility management, and "stuff."

**People:** In a small to mid-size firm, the legal administrator must get to know their staff and understand what their motivation is. When hiring a new staff person, knowing your current staff's personalities will help you decide if the potential new hire will fit in with the current culture of the firm. In this category, the legal administrator is the trainer, coach, benefits administrator, and the complaint department.

**Financials:** In a large firm, there may be a chief financial officer, but in a small to mid-size firm, the legal administrator is the one in charge of the monthly reports, day-to-day cash management, including payroll and partner draws, and billing management. She indicated that it is vitally important for attorneys to bill

every single moment of their time and to get those time sheets input in a timely manner. In a firm, 70-80% of the expenses go to rent, salary, and benefits.

**Facilities:** This area entails generally knowing about lease negotiations, suite management, insurance, and storage. If your firm decides to move locations or do a build-out, the legal administrator must be able to manage everything. Ms. Cole indicated that the SVALA has multiple checklists and guides to assist a legal administrator in accomplishing a move or build-out.

**Stuff:** Ms. Cole went on to say that the "stuff" category included knowledge of ergonomics, furniture and fixtures, computers, supplies and ordering, file clerk, calendar clerk, and marketing.

Ms. Cole's presentation was upbeat and informative. We appreciate her taking the time to speak to our association.



From left to right: Anne French, Alex Cain, and Moe Tallamentes

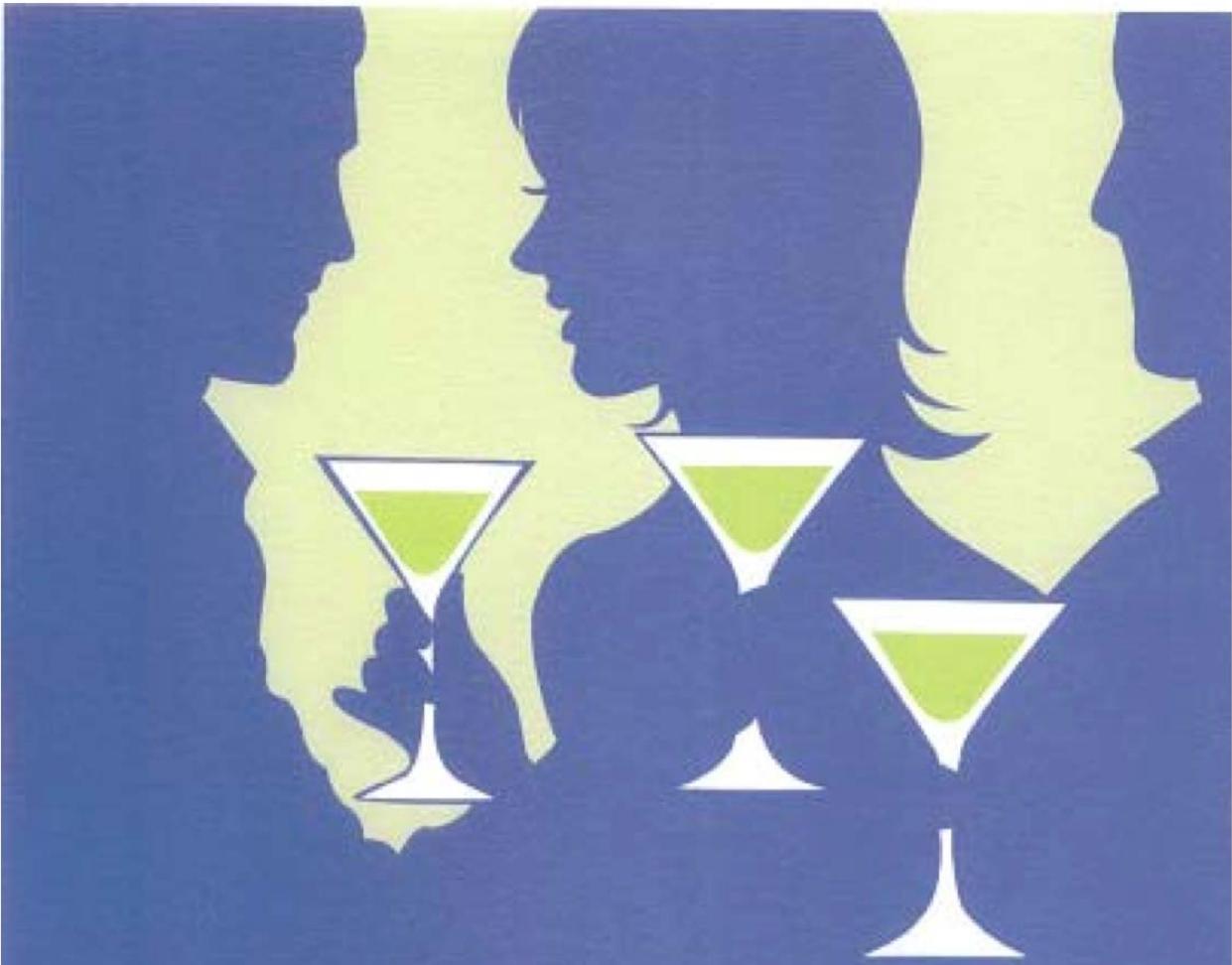


From left to right: Lynn Cole and Kristi Baughman



New members, from left to right: Alex Cain, and Moe Tallamentes





*Butte County LPSA*  
INVITES YOU TO JOIN THEM FOR A  
*Welcome Luncheon*  
FOR LSI PRESIDENT, BROOKE ATHERTON, CCLS

SATURDAY, OCTOBER 16, 2010

NOON - 2:00 P.M.

THE ITALIAN COTTAGE  
2234 THE ESPLANADE  
CHICO, CALIFORNIA



# Sacramento Legal Secretaries Association

## Dinner Meeting - October 21, 2010

Vendor of the Month:  
Luke Patterson  
Capitol Legal Investigations

Speaker:

**Mark Peterson, Esq.**

**Diepenbrock Harrison**

Topic:

***"The Lifecycle of a Corporation"***

5:30 – 6:15 p.m. Meet & Greet

6:15 – 8:00 p.m. Dinner Meeting

**Courtyard Marriott**

**Midtown Sacramento**

4422 Y Street, Sacramento, CA

Tel: (916) 455-6800

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

**RSVP by October 18.** Complete & detach reservation form, enclose check payable to SLSA, and mail to: Jennifer Shelton, Murphy Austin Adams Schoenfeld, 304 "S" St., Sacramento, CA 95811; phone: 916.329.3104; fax: 916.503.4000; email: [jshelton@murphyaustin.com](mailto:jshelton@murphyaustin.com). **\*Please add \$3 for reservations made after October 18.** **NOTE:** Cancellations must be received 48 hours in advance for a refund. No-Shows will be billed.

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

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

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

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

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

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

### Italian Buffet Selections

- Antipasto platter
- Pesto Penne pasta Salad
- White Bean and Artichoke Salad
- Classic Caesar Salad,
- Chicken Saltimbocca
- Mushroom Ravioli
- Garlic Bread
- Focaccia rolls
- Tiramisu
- Biscotti



Do you require an  MCLE or  CCLS certificate?

Are you an SLSA member?  YES  NO

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

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



# October 2010

## Dates to Remember

- **October 6 - Grammar Gregg's Way** (Location: Fagen Friedman & Fulfroft, LLP - Time: 5:45 p.m.)
- **October 12 - SLSA Board Meeting** (Location: Somach Simmons & Dunn - Time: 5:30 p.m.)
- **October 18 - SLSA Lunch Lesson** (Location: Downey Brand - Topic: Bankruptcy Procedures.)
- **October 21 - SLSA Dinner Meeting** (Location: Courtyard Marriott Midtown - Topic: The Lifecycle of a Corporation.)
- **October 22-23 - Monster Mash, Annual Safe & Super Halloween** (Location: Fairytale Town, Sacramento; Time: 5-9pm both Saturday and Sunday.)
- **October 25 - Last Day to Submit Articles for the November issue of The Legal Eagle**
- **October 26 - SLSA Evening Seminar** (Location: Downey Brand - Topic: Summation Training.)
- **November 3 - Grammar Gregg's Way** (Location: Fagen Friedman & Fulfroft, LLP - Time: 5:45 p.m.)
- **November 8 - SLSA Board Meeting** (Location: Somach Simmons & Dunn - Time: 5:30 p.m.)
- **November 12-13—LSI Conference (N. Hollywood)** (Location: Beverly Hills Garland Holiday Inn)
- **November 15- SLSA Lunch Lesson** (Location: Downey Brand - Topic: TBD)
- **November 18 - SLSA Dinner Meeting** (Location: Courtyard Marriott Midtown - Topic: TBD - Time: 6:16-8 p.m.)
- **November 22 - Last Day to Submit Articles for the November issue of The Legal Eagle**
- **November 30 - SLSA Evening Seminar** (Location: Downey Brandt - Topic: TBD)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6 <i>Grammar Gregg's Way</i>	7	8	9
10	11	12 <i>Board Meeting</i>	13	14	15	16
17	18 <i>Lunch Lesson</i>	19	20	21 <i>General Meeting</i>	22 <i>Fairytale Town</i>	23 <i>Fairytale Town</i>
24 <i>31</i>	25 <i>Bulletin/Articles Deadline</i>	26 <i>Evening Seminar</i>	27	28	29	30



# Vocabulary List

*by Jennifer Estabrook, CCLS*

## BANKRUPTCY

<p><b>V</b></p> <p><b>O</b></p> <p><b>C</b></p> <p><b>A</b></p> <p><b>B</b></p>	<p><b>Adversary Proceeding</b>      A lawsuit filed in the bankruptcy court which is related to a debtor’s bankruptcy case.</p> <p><b>Automatic Stay</b>              The injunction issued automatically upon the filing of a bankruptcy case which prohibits collection activities against the debtor, the debtor’s property, or the property of the estate.</p> <p><b>Bankruptcy Estate</b>            All of the legal and equitable interests of the debtor as of the commencement of a bankruptcy.</p> <p><b>Creditor</b>                        Person or organization to whom a debtor owes money or has some other form of legal obligation.</p> <p><b>Debtor</b>                            Person, partnership or corporation who is liable for debts and who is the subject of a bankruptcy case.</p> <p><b>Debtor in Possession</b>        A debtor in a bankruptcy who has been permitted to remain in possession of its assets and business operations, with most of the powers and duties of a trustee.</p> <p><b>Discharge</b>                        The legal elimination of a debt through a bankruptcy case.</p> <p><b>Exemption</b>                      Property that may be kept by a debtor free from liens and is not used for distribution to the creditors.</p> <p><b>Lien</b>                                An interest in real or personal property which secures a debt.</p> <p><b>Office of the U.S. Trustee</b>      An arm of the U.S. Department of Justice charged with administering the bankruptcy trustee program and monitoring financial reporting in Chapter 11 cases.</p> <p><b>Petition</b>                         The document that initiates a bankruptcy. The filing of the petition constitutes an order for relief and institutes the automatic stay.</p> <p><b>Proof of Claim</b>                A form filed with the court by a creditor establishing the creditor’s claim against the debtor.</p> <p><b>Relief from Stay</b>                When the automatic stay is lifted by the court at a creditor’s request to permit some action against the debtor or property of the estate.</p> <p><b>Schedules</b>                      Lists of the debtor’s assets and liabilities required to be filed with the petition to commence a bankruptcy case.</p> <p><b>Trustee</b>                          One who is appointed by the court to review the debtor’s schedules and represent the interests of the creditors.</p>
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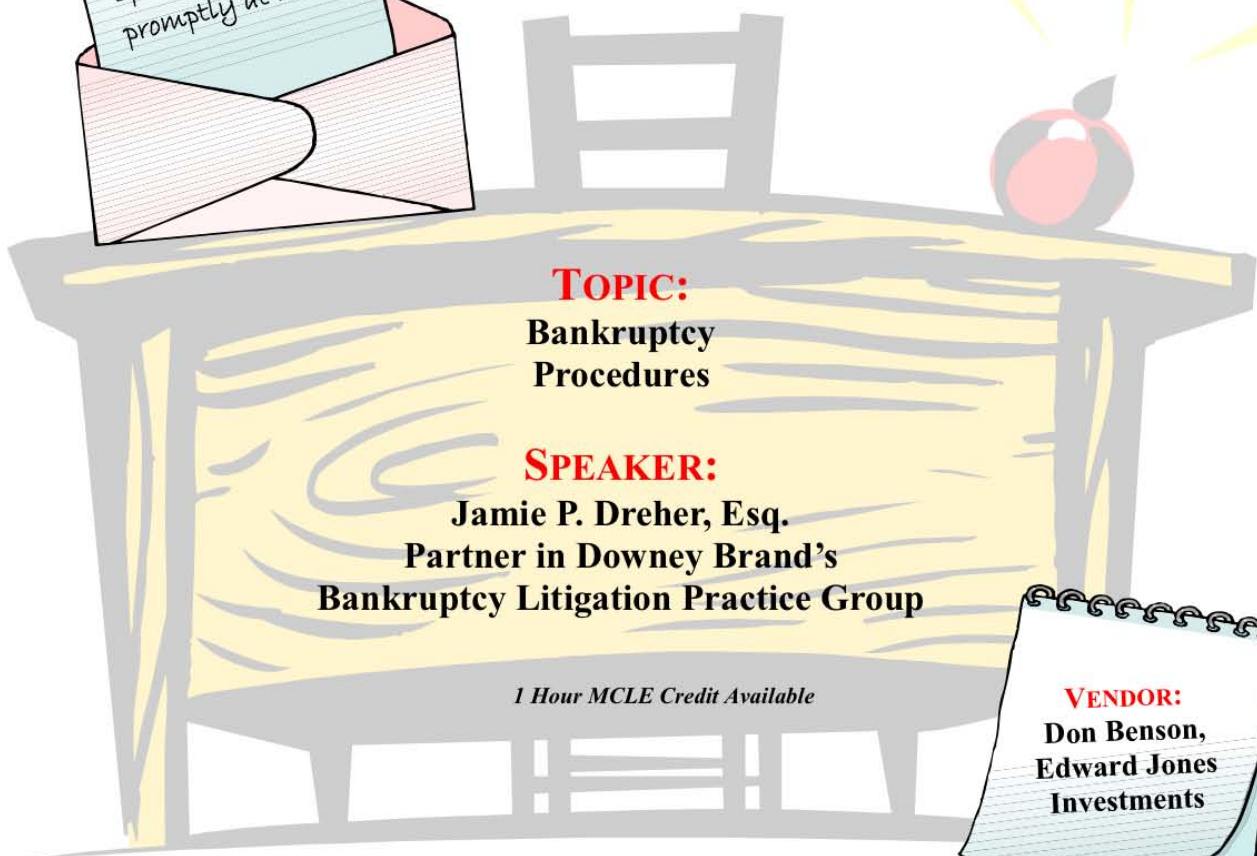


# Sacramento Legal Secretaries Association

## LUNCH LESSON



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



**TOPIC:**  
 Bankruptcy  
 Procedures

**SPEAKER:**  
 Jamie P. Dreher, Esq.  
 Partner in Downey Brand's  
 Bankruptcy Litigation Practice Group

*1 Hour MCLE Credit Available*



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

**Make Checks Payable to: SLSA**  
**Reservations due by 10/14/10**

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

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

## Governor's Report

by Dawn Forgeur, CCLS



## Conference



## Time

It's that time for conference again. Next month our sister association, San Fernando Valley LPA will host the Second Quarterly Legal Secretaries, Inc. conference in North Hollywood. The conference will take place Friday, November 12 through Sunday, November 14. A copy of the registration can be found in the bulletin. The LSI conferences are held quarterly and offer many educational opportunities. Next month, the legal specialization sections are offering the following workshops:

**Transactional:**

Entertainment Contracts

**Probate:**

Are Your Elders Protected?

**Family:**

Custody Litigation and Evaluations

**Law Office Administration:**

Developments in Employment Law for 2011

**Civil:**

Subpoena Laws of California

**Criminal:**

Crime and Immigration

Please keep in mind that if you are a section member there is no cost with advanced registration. Also, our association can earn Chapter Achievement Points if you belong to one or all of the legal specialization sections. Send me an e-mail if you are so that I can count your points!

## Out of Business Sale

As you many know, McDonough Holland & Allen PC is dissolving. We have numerous supplies and equipment for sale at very low prices, for example: Hole Punches, Staplers, Tape, Tape Dispensers, Foot Rests, Copy Holders, Post It Notes, Easels, Pens, Tablets, etc.

If you are interested, I can send you a price list of available items. All items have been gently used by our former legal secretaries at MHA.

Please contact me with any questions.

Thank you.

Shelley Heitzman | Purchasing & Supply  
 McDonough Holland & Allen PC  
 500 Capitol Mall 18th Floor | Sacramento, CA 95814-4692  
 [D] 916.403.2571 [C] 916.496.0533  
[sheitzman@mhalaw.com](mailto:sheitzman@mhalaw.com) | [www.mhalaw.com](http://www.mhalaw.com)



CHAPTER ACHIEVEMENT REPORTING FORM

Each Association in LSI participates every year in the Chapter Achievement Contest. Associations are grouped in categories depending upon the Association's membership (Group A: 5-30; B: 31-50; C: 51-75; D: 76-95; and E: over 95). Five awards of \$250 each are presented by Stuart F. Cooper Co. to the highest scoring Association in each of the above categories at the Annual Conference of LSI. Chapter Achievement points are tracked during the year by the Association's Governor. The Chapter Achievement Report covers activities from April 1, 2010 through March 31, 2011. This form's purpose is to track each member's activity during the course of the fiscal year. Please complete the form each time you attend a function and mail it to the person named below. If you attend a function and are not sure if it applies, include it below on the blank line provided and it will be determined if it applies. If you are an SLSA officer or committee chair, PLEASE take particular note to the last item below. Thank you.

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

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

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

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

# Legal Procedures

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

*“Beginning*

*October 5, 2010, submission of new case data will be required to electronically file a new bankruptcy case.”*

*~Laura Welch, CCLS, Nancy Vanderhorst, CCLS, and Molly Mahoney*

## United States Bankruptcy Court, Eastern District—Update

### Submission of New Case Statistical Data Will Be Required to Electronically File a New Bankruptcy Case Beginning October 5, 2010

In 2009, the electronic filing system was modified to collect data elements necessary to meet the BAPCPA related reporting and business needs of the Executive Office of U.S. Trustees (EOUST). The data elements are provided by electronic case filers as part of electronically-filing a new case. E-filers currently have the option to manually enter the data on a statistical data collection screen or to include the data in a pipe-delimited text file for upload with their documents. The EOUST receives the data from the court through a daily data download from CM.

New cases are currently accepted for filing by the electronic filing system regardless of whether the new case data is submitted by the e-filer with the documents. However, due to recent electronic filing system enhancements, the new case data can be used to open new cases in CM without deputy clerk intervention. Due to the significant Clerk’s Office labor savings resulting from this enhancement, **beginning October 5, 2010, submission of new case data will be required to electronically file a new bankruptcy case.**

Regardless of the type of upload, single file or batch upload, electronic-filers will still have the option on and after October 5, 2010, to manually enter data or to include the data in a pipe-delimited text file for upload with their documents. The data

file definition is the same as the CM/ECF version 3.3 case upload file definition. Consequently, bankruptcy petition preparation software that includes the CM/ECF automatic case upload option can be used to automatically create the required data file from information entered to complete the debtor’s petition, schedules, means test, and other documents. Thousands of data files created automatically by Best Case, Collier TopForm, EZ-Filing, New Hope Software, Inc.-Bankruptcy 2010, and Thompson Reuters, Chap7.13 software submitted to the court during the past year were tested and found to be reliable, although any petition preparation software upgraded to work with CM/ECF version 3.3 that includes the CM/ECF automatic case upload option may be used to create the required data file. Electronic filers using any other petition preparation software than that listed above should contact their software vendor to learn what their software’s automatic case upload options are. The [CM/ECF Bankruptcy Release 3.3 Case Upload File Definition](#) is available through this link at the Pacer Service Center.

If a data file is not uploaded with the new case documents, electronic filers will be required on and after October 5, 2010, to manually enter debtor and joint debtor information, as well as information from the petition, schedules and other documents, on a series of data entry screens. Because the amount of data required is significant, electronic filers not currently using petition preparation software may wish to consider using it. It

should be noted that the new case data submitted on and after October 5, 2010, will be used as is to open new cases in CM. In other words, it will not be reviewed or corrected by Clerk’s Office staff prior to its entry in CM. As a result, the accuracy of the court record for a new case will depend entirely upon the quality of the data submitted by the electronic filer. It is imperative, therefore, that e-filers take the necessary steps and precautions to ensure that the new case data submitted by them is accurate and complete.

If you have questions concerning new case data or the electronic filing of new cases, please contact the e-filing Help Desk.

Taken from the United States Bankruptcy Court, Eastern District of California Website: [http://www.caeb.uscourts.gov/documents/PublicNotices/eFiling\\_10042010.pdf](http://www.caeb.uscourts.gov/documents/PublicNotices/eFiling_10042010.pdf)

**\*CM=Case Management**

**\*ECF=Electronic Case Files**



**NOTICE CONCERNING REVISION OF  
CIVIL LOCAL RULE 7-3**

The United States District Court for the Northern District of California Court has approved a revision of Civil Local Rule 7-3, effective September 14, 2010. A copy of the revision appears below.

**Revision of Civil L.R. 7-3**

**7-3. Opposition; Reply; Supplementary Material**

**(a) Opposition.** Any opposition to a motion must be served and filed not less than 21 days before the hearing date. The opposition may include a proposed order, affidavits or declarations, as well as a brief or memorandum under Civil L.R. 7-4. Any evidentiary and procedural objections to the motion must be contained within the brief or memorandum. Pursuant to Civil L.R. 7-4(b), such briefs or memoranda may not exceed 25 pages of text.

(b) [no change]

**(c) Reply.** Any reply to an opposition must be served and filed by the moving party not less than 14 days before the hearing date. The reply may include affidavits or declarations, as well as a supplemental brief or memorandum under Civil L.R. 7-4. Any evidentiary and procedural objections to the opposition must be contained within the reply brief or memorandum. Pursuant to Civil L.R. 7-4(b), the reply brief or memorandum may not exceed 15 pages of text.

**(d) Supplementary Material.** Once a reply is filed, no additional memoranda, papers or letters may be filed without prior Court approval, except as follows:

(1) If new evidence has been submitted in the reply, the opposing party may file within 7 days after the reply is filed, an Objection to Reply Evidence, which may not exceed 5 pages of text, stating its objections to the new evidence, which may not include further argument on the motion.

(2) Before the noticed hearing date, counsel may bring to the Court's attention a relevant judicial opinion published after the date the opposition or reply was filed by serving and filing a Statement of Recent Decision, containing a citation to and providing a copy of the new opinion—without argument.



# Law Office Products/ Management

by Ron Bodenmann

## Can you trust your vendor with E-Discovery?

We all know our vendors by name. Maybe you've had lunch with them or a drink after work. We depend on

Part of the cost of providing vended services includes carrying a significant amount of legal software licenses that

ally be identified by having very low prices, but they also often have other red flags that indicate that your documents

**"What would happen if your vendor closed their doors? 'Can your vendor defend their work in court?'" ~ Ron Bodenmann**

them for helping us get our jobs done and hopefully make us look good in the process. However, once they leave your office, where do your documents go and how does your vendor handle them? Have you toured their facilities? Do they have the appropriate licenses and liability insurance? Are their employees legal residents? Some firms spend as much as \$100,000 per year on vended services and expose their client's most confidential information to vendors without as much as a credit check. In my 16 years in this industry I have seen a lot of vendors come and go. What would happen if your vendor closed their doors tomorrow? What would your liability be, and how would you protect yourself and your client from loss?

entail per page (click) charges or steep annual fees. Without valid licenses, vendors may find it difficult to get important updates to electronic discovery rules and would have a tough time defending their work if ever asked to do so. Can your vendor defend their work in court? Similarly, the cost of doing business in any market or service includes the cost of complying with labor laws and paying for appropriate local business licenses. In any market there are vendors who cut corners by pirating software and paying people under the table. These vendors can usu-

ally be identified by having very low prices, but they also often have other red flags that indicate that your documents may not be completely safe, or that they may not be on solid financial footing.

So how do you avoid putting yourself a risk by choosing a vendor? The best way is to take the time to do some research, including taking a tour of their facility. Most reputable vendors will be more than happy to show you around. Then, before you finalize an arrangement, ask questions, both of the vendor and of their current and former clients. (Most of these questions work well whether you are dealing with finding a vendor for E-Discovery or for scanning and photocopying.)

*"In any market there are vendors who cut corners by pirating software and paying people under the table."  
~ Ron Bodenmann*

In a tough economy vendors feel the pinch like other small businesses. In order to stay alive vendors must constantly look at the bottom line, trying to balance making the market's demand for reasonable prices while still offering a high level of service and maintaining a defensible level of document custody. How does your vendor deal with these pressures?





## Top Questions to Ask When Choosing an E-Discovery Vendor

### Basic Questions

- How long has this vendor been in business in the local area?
- How involved is the vendor in the local litigation support world?
- Does the vendor have a history of paying their suppliers and their vendors on time?
- What is the vendor's gross capacity: how many employees, copiers, scanners, printers, computers, processing licenses; how much storage space for boxes and for electronic files, etc.?
- How conveniently located is the vendor?
- Does the vendor provide pickup and delivery services, and are they reliable?
- How is your data protected against loss or corruption while it is on the vendor's system?

### Scope of Services

- What services does the vendor offer?
- If case parameters change, will the vendor be able to meet your needs and time frames?
- Are there volume benefits/discounts if you use multiple services (e.g. processing, hosting and production versus just hosting)?
- What services are sub-contracted out and does data ever leave the vendor's site? If so, how does the vendor ensure the safety and security of your documents and/or data?
- What size or type of case is too big for the vendor?
- What have been vendor's toughest cases?

### Expertise (Not all vendors are created equal; and it is not all about price)

- What is the vendor's knowledge level of the technical issues?
- Are the vendor's employees certified in the tools they use?
- What is the vendor's level of understanding of the legal process?
- How does the vendor's expertise compare to other vendors?

### Quality of Services

- Would you be comfortable establishing a long-term relationship with this vendor?
- How does the vendor ensure that they provide high quality service consistently, including accuracy and on-time delivery?
- Are errors tracked? What are considered errors? How are errors addressed?
- Does the vendor correct errors without complaint and without additional cost?
- What do the vendor's references say about the vendor?

### Customer Service

- What hours does the vendor operate?
- How available are the vendor's employees and principals during non-business hours?
- How much lead time is needed for processing and production?
- How are cases assigned to production staff?
- Who is the primary point of contact? Is it the same throughout the case?
- Is there a backup contact?
- What is the nature of the vendor's project management team and approach?
- How are issues escalated and to who has the final say in resolving issues?
- Can the vendor re-access work that they did 3 months ago? 6 months ago? A year ago?

### Technical Specifications

- Does the vendor use proprietary versus non-proprietary software and what are the benefits/trade-offs?
- If the data is not being processed locally, what is the vendor's FTP connection speed and how does it compare with your law firm's FTP speed?
- What is the vendor's policy on backing up data?
- What is the vendor's policy regarding storing data?



**CONFERENCE REGISTRATION FORM**

Name (as it will appear on badge) \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Home Telephone: \_\_\_\_\_  
 Work Telephone: \_\_\_\_\_  
 Email Address: \_\_\_\_\_  
 Local Association (please spell out) \_\_\_\_\_ LSALP A

PLEASE INDICATE IF YOU ARE:

_____ State Officer _____	<u>Title</u>	_____ Governor
_____ State Chairman _____		_____ CCLS _____ PLS

SCRIP (Includes Registration, Welcome Reception, Banquet, and Brunch)  
 POSTMARKED **ON OR BEFORE OCTOBER 12, 2010** \$ 93.00 \$ \_\_\_\_\_  
 POSTMARKED **OCTOBER 13, 2010 OR LATER** \$ 103.00 \$ \_\_\_\_\_

INDIVIDUAL TICKETS

_____ Registration PRIOR to October 12, 2010	\$ 15.00	\$ _____
_____ Registration AFTER October 13, 2010	\$ 25.00	\$ _____
_____ WELCOME RECEPTION (Friday)	\$ 20.00	\$ _____
LUNCHEONS Vegetarian Meal _____		
_____ Presidents' Luncheon (Saturday)	\$ 24.00	\$ _____
_____ Governors' Luncheon (Saturday)	\$ 24.00	\$ _____
_____ Membership Luncheon (Saturday)	\$ 24.00	\$ _____
_____ BANQUET (Saturday Evening)	\$ 42.00	\$ _____
_____ BRUNCH (Sunday)	\$ 22.00	\$ _____
TOTAL AMOUNT ENCLOSED		\$ _____

Please Indicate Dinner Choice: \_\_\_\_\_ Prime Rib \_\_\_\_\_ Stuffed Eggplant (Vegetarian)  
 \_\_\_\_\_ Filet of Salmon  
 Special Dietary Restrictions: \_\_\_\_\_

**Please make checks payable to: SFVLSA November 2010 Conference Fund**  
**Mail to: SFVLSA, c/o Annette Johnson, 1838 Amargosa Drive, Palmdale, CA 93551**

For Questions/General Information Contact: Annette Johnson, Registration Chair - [Annettejohnson8@aol.com](mailto:Annettejohnson8@aol.com) OR  
 Lisa De La O, Conference Chair - (818) 784-8700 / [lisaad@ssmlaw.com](mailto:lisaad@ssmlaw.com) / [www.sfvlsa.com](http://www.sfvlsa.com)

**NO REFUNDS AFTER OCTOBER 31, 2010**



**HOTEL RESERVATION FORM**

**HOTEL INFORMATION:**

Beverly Garland Holiday Inn  
4222 Vineland Avenue  
North Hollywood, CA 91602  
(818) 980-8000 / (818) 766-0112 Fax /  
[www.beverlygarland.com](http://www.beverlygarland.com)

**ROOM RATES:**

\$119.00 King Bed  
\$119.00 Two Queen Beds  
Plus 14% Room Tax Per Night and  
\$0.15 Tourism Tax Per Night

**ROOM RESERVATIONS:**

Please contact the hotel directly at 818-980-8000 ext. 7271 or book online at  
<http://events.ichotelsgroup.com/DPRD-7ZY2GM/LAXBG/website/>

**GROUP BOOKING CODE:** LSI

**CHECK IN/OUT:**

Check-In Time: 3:00 p.m. / Check-Out Time: 12:00 p.m.

**SELF PARKING:**

\$7.00 per day / \$14.00 per night for overnight guests

**AIRPORTS:**

Burbank (Bob Hope) 5 miles from hotel  
Los Angeles International (LAX) 17 miles from hotel



**SHUTTLE SERVICE:**

Super Shuttle 1-800-BLUE-VAN (1-800-258-3826) or book online at [www.supershuttle.com](http://www.supershuttle.com)



**QUESTIONS/GENERAL INFORMATION:**

Annette Johnson, Registration Chair  
[Annettejohnson8@aol.com](mailto:Annettejohnson8@aol.com)

Lisa De La O, Conference Chair  
(818) 784-8700 or [lisad@ssmlaw.com](mailto:lisad@ssmlaw.com)

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

**DEADLINE FOR GROUP RATE IS OCTOBER 18, 2010**



# Sacramento Legal Secretaries Association

Continuing Education

Evening Seminar

October 26, 2010

Speaker:

**Ron Bodenmann of Capitol Digital**

Topics:

## “Basic Summation Training”

- The Summation Environment
  - Working with cases
- Working with the Core Database
- Searching the Core Database
- Editing the Core Database
  - Core Database Utilities
  - Working with Images
  - Database Utilities

Time: 6 – 8 p.m.

**Downey Brand LLP**

**Downtown Sacramento**

621 Capitol Mall, 15<sup>th</sup> Floor

Tel: (916) 444-1000

\$30 SLSA Members/\$35 Non-Members

**VENDOR SPONSOR:**

**TBA**

**Space is limited. Please RSVP by October 22. Late Registrations must add \$3 for reservations made after October 22.**

**MCLE & CCLS Credit:** SLSA is a local association of Legal Secretaries, Inc. and an approved provider. SLSA 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 **2 hours**.

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

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

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

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

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

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

Complete & detach reservation form, enclose check payable to SLSA, and mail to:  
 Sophia Albov, CCLS  
 Cook Brown LLP  
 555 Capitol Mall, Suite 425  
 Sacramento, CA 95814  
 email:salbov@cookbrown.com  
 916-626-1349

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

If you would like to be removed from this fax list please e-mail forqeurd@qlaw.com

Do you require an MCLE or CCLS certificate?

Are you an SLSA member? YES NO

If “No”, are you interested in membership? YES NO

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

Participants are responsible for their own parking costs. Light snacks and beverages will be provided.



# Speaker Spotlight

## September Evening Program: Accounting and Legal Dockets, Lisa McCargar and Pamela Jansz

by Dawn Forgeur, CCLS

Sacramento Legal Secretaries Association (“SLSA”) welcomed two guests for this month’s Evening Program, Lisa McCargar, CPA, of Perry Smith and Pam Jansz of Seyfarth Shaw. Lisa spoke about understanding basic accounting and financial statements, while Pam spoke on legal calendaring and docketing timelines.

Both speakers were very informative and it was a pleasure to have them speak to us on these topics.

The first half of the evening, Lisa covered the role of accounting for the legal professional who may be asked to handle items that are related to a client’s financial status, petty cash for the firm, calculate interest, calculate sums for a memorandum of costs, or calculate attorney’s fees. The basic principle of accounting is: The systematic recording, reporting, and analysis of financial transactions of a business. For example, how much money has come into the business (revenue); how much money has gone out (expenses); what is owned (assets); what is due (liabilities); and what is left over (equity).

Lisa took attendees through a scenario of owning a candy store, what items a business owner needs to track, and keeping a record of those transactions. She went over the balance sheet, the income statement, the concept of balancing, the T-account, debits and credits, assets, liabilities, equity, and the double

-entry system of accounting.

The second half of the evening was on legal calendaring and docketing with Pam Jansz. We started out by covering the court structure in California, which is important to know so you understand which rules to use when docketing an item. It was stressed that you must always check for local court rules and judge’s orders that might list different rules than what is given in the California Rules of Court or the Code of Civil Procedure.

Pam discussed computation of time and extensions for service for summons and complaint, responses to complaints, discovery, and motions, both regular and MSJs. Pam also talked about the right way to count the days on a calendar.

Lisa A. McCargar, CPA is a Senior Vice President, Assurance Services at Perry Smith. Her background includes twelve years in public accounting and fourteen years in private industry. Lisa specializes in serving the firm’s commerce and employee benefit plan clients. She has a Bachelor of Science, Accounting from Pepperdine University.

Pamela Jansz is a certified CompuLaw Vision trainer and currently works for Seyfarth Shaw, LLP as the docket clerk and trainer for their Sacramento office. She obtained her certificate in Legal Assistantship from U.C. Santa Barbara in 1982 and her Certified

Legal Assistant designation in 1983. She has worked as a litigation paralegal in multiple insurance defense law firms. In 2003, she became an independent training consultant for CompuLaw Vision.



*Pictured from left to right: Dawn Forgeur, CCLS and Pam Jansz, CompuLaw Legal Docketing Expert*



*Pictured from left to right: Anne French and Lisa McCargar, VP Perry Smith*



“You must always check for local court rules and judge’s orders that might list different rules than what is given in the California Rules of Court or the Code of Civil Procedure.”

~Pam Jansz

*Livermore-Amador Valley Legal Professionals Association  
Presents:*

***An Autumn Affaire Returns!  
15th Annual Silent Auction & Luncheon***

*Sunday, November 7, 2010  
11:30 a.m.*

*Girasole Grill  
3180 Santa Rita Road  
Pleasanton, CA*

*\$25 per person  
~Space is Limited~*

*RSVP by October 25, 2010 by  
mailing check payable to LAVLPA and form below to:*

*Christine Boccia, CCLS  
c/o Randick, O'Dea  
5000 Hopyard Rd., #400, Pleasanton, CA 94588*

*For Further Information, contact:  
Christine Boccia, CCLS (925) 460-3700  
Helene Chase (925) 846-3592*



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

*LSI Officer or Chariman \_\_\_\_\_*

*Luncheon choice (includes dessert, coffee, tea, and soda):*

- Insalata Mista Salad with Grilled Chicken Breast*
- Herb Marinated Grilled Chicken Breast Sandwich*
- Penne Pasta Primavera*



## BLS Report

by Desiree Delonia, CCLS



I, on behalf of the Sacramento Legal Secretaries Association finished another successful Beginning Legal Secretary class. Many thanks to Liz Gideon for taking over the BLS Assistant position; without her life would have been a lot more difficult. This was my first year teaching this class and thanks to Liz for assisting in correcting assignments and keeping things organized so that I could focus on the teaching part of the BLS class. Also, a special thanks to Jaymie Morales for taking the laboring oar of fielding calls and assisting with the registration process.

I would like to begin my report by congratulating the top eight scoring students for the Summer 2010 class. They did a fantastic job in earning their grade and working to keep it.

Maimie Chyinski  
Shelly Davis  
Layla Sharief  
Debbie Sidhu  
Lao Sok  
Jennifer Sullivan  
May Vang  
Katelyn Zuppan

The Beginning Legal Secretary course is a 9-week training program designed to teach students about the introduction to the law office, file management, service of process, legal citations (i.e. differences between Bluebook and California Style Manual), discovery procedures, civil litigation procedures, docketing/calendaring, alternative dispute resolution, and pre-trial proceedings.

We began the class with 19 students. In order to pass the Beginning Legal Secretary

class, a student must have a cumulative homework grade of 75% or more **and** pass the final exam with a grade of 75% or more. Overall, the class was a success. The final exam was a comprehensive exam including questions most commonly missed throughout the course and questions from all of the weeks of class instruction and reading materials. In the end, 12 qualified to take the final exam; 1 passed with an A; 5 passed with a B; 2 passed with a C of 75% or above – the required passing percentage.

While each class is different based on student personalities and the dynamics of the class itself, Liz and I really enjoyed this group of students. I was surprised at how organized and driven this class was. They were there each day on time, homework set on the table, and ready to learn. We found that we had a genuinely good time and enjoyed spending time with each of them.

I would like to thank Somach Simmons & Dunn for allowing us to use their conference room and being such wonderful and accommodating hosts. Somach Simmons & Dunn has shown a tremendous support for SLSA's efforts to provide continuing legal education to the legal professional and we thank them for it!

I hope to see others step up and impart some of their knowledge. If you ever thought about it, I encourage you to try teaching and help others succeed and achieve their goals of continuing to learn and grow. Once again, thank you for allowing me to teach this program.

## CCLS Quiz Answers

by Jennifer Estabrook, CCLS

### ANSWERS:

1. True; 11 U.S.C. §109(a)
2. False; 11 U.S.C. § 109(c)
3. True; 11 U.S.C. § 522(b)(1)
4. False; 11 U.S.C. § 727(e)
5. False; 11 U.S.C. § 1104(a)
6. True; 11 U.S.C. § 341
7. False; 11 U.S.C. §341
8. True; 11 U.S.C. § 706(a)
9. False; <http://www.uscourts.gov/FederalCourts/Bankruptcy/BankruptcyBasics/Glossary.aspx>
10. True; 11 U.S.C. Chapter ;13



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## Out to Lunch:

### Great Lunch Spots & Happening Happy Hour Places

by *Sophia Albov, CCLS*



#### Burgers & Brew

1409 R St  
Sacramento, CA 95811  
(916) 442-0900

#### Hours of Operation

Open 7 days a week  
Sunday through Wednesday 11 a.m. until midnight  
Thursday through Saturday 11 a.m. until 3 a.m.

Nestled in the middle of the block on R Street between 14<sup>th</sup> and 15<sup>th</sup> resides Burgers & Brew, a great place for a quick bite or a large group gathering. There are three Burgers & Brew restaurants in the valley; one here in Sacramento, one in Davis, and one in Chico. These restaurants are part of the same ownership group another Sacramento restaurant, Crepeville!

As the name indicates, Burgers & Brew specializes in both (Duh!) burgers and brews, yet the menu offers so much more. There are 14 different burger combinations, as well as many non-beef and vegetarian offerings. Your burger options include all-natural Niman Ranch beef patties, turkey, buffalo, Garden burgers, smoked tofu patties, and Portobello mushroom burgers. A delicious range of extras and side orders are also available. With the purchase of a burger you automatically get fries, but there is the option to upgrade

to onions rings, garlic fries, curly fries, or chili fries for only 75 cents more. Or, for an additional \$1.50, you can exchange the fries for a soup, Caesar salad, or house salad. For those not in a burger mood, there are sandwiches, hot dogs, fish and chips, and salads. The daily special varies but generally is of the burger variety. There is also a good kids menu. The extensive beer menu boasts a total of 71 varieties of beer; 12 on tap and 59 in the bottle! They also offer an ample selection of red and white wines.

The interior décor consists of dark mahogany stained wall panels adorned with bright and lively paintings from local artists. Matching wooden tables and chairs hug the outside of the dining area with a handful of bistro-style tables nestled around the bar. Tall frontal windows provide for an airy and well-lit feel. As the inside seating can fill up quickly, it is refreshing that Burgers & Brew offers patio

seating outside along R Street. Nothing is quite as comfortable as chomping on a bacon cheeseburger and washing it down with an ice cold Stella Artois as you watch the sun set behind the adjacent skyline.

While there always seems to be plenty of wait staff, table service can range from attentive to scattered. As unpredictable as the service tends to be, the kitchen staff's prompt delivery keeps the wait times short. Burgers & Brew can get packed during lunchtime and parking in the area can be sparse. There is pay street parking in the vicinity; however, as there are several restaurants on the block, it is quite a popular destination. It is ideal for an early or late lunch, but you might not want to go at noon if you are limited to an hour long lunch. They are great for Happy Hour and are open late night on the weekends.



### Happy Hour Specials:

Monday thru Friday 3 p.m. until 6 p.m. – drinks specials and food menu  
Thursday, Friday, and Saturday 10 p.m. until 11:30 p.m. – drink specials

#### Happy Hour Menu

\$5 options  
Buffalo Petite Drumettes  
Fish Quesadillas  
Pepper Jack Quesadillas  
\$5.50 options  
Tahini Sliders  
Shish Kabobs

#### Drink Specials

\$1.00 off all drafts  
\$2.00 off all draft pictures



# Happy "October" Birthdays!!



- *Debbie Sidhu* October 1
- *Nancy Vanderhorst, CCLS* October 1
- *Launa Atkinson, CCLS* October 4
- *Lori N. McCleerey* October 4
- *Jennifer Talent-Chastain* October 5
- *Lillian Casipit* October 8
- *Astrid B. Watterson, CCLS* October 9
- *Jodi Wright* October 18
- *Johnny Bateman* October 21
- *Molly Mahoney* October 24
- *Chad Bowman* October 26
- *Erica Dillard* October 28
- *Jennifer Estabrook, CCLS* October 30
- *Maria Reyes* October 30
- *Sally Brooks* October 31

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

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

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

NAME OF APPLICANT \_\_\_\_\_  
 EMPLOYER \_\_\_\_\_ POSITION \_\_\_\_\_  
 MAILING ADDRESS \_\_\_\_\_ CITY/ZIP \_\_\_\_\_  
 BUSINESS TELEPHONE (\_\_\_\_) \_\_\_\_\_ RESIDENCE TELEPHONE (\_\_\_\_) \_\_\_\_\_  
 BUSINESS E-MAIL \_\_\_\_\_ RESIDENCE E-MAIL \_\_\_\_\_  
 EMPLOYMENT IN THE LEGAL FIELD (INCLUDE POSITIONS, DATES) \_\_\_\_\_

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

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

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

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

SPONSOR \_\_\_\_\_ APPLICATION APPROVED \_\_\_\_\_

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

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

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

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

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

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

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

SLSA and LSI MEMBERSHIP APPLICATION (continued)

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

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

**YOUR SPECIALTY:**

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

**EDUCATION:**

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

**TYPE OF OFFICE:**

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

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

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

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

WHERE WOULD YOU LIKE YOUR E-MAIL DELIVERED? [ ] BUSINESS [ ] RESIDENCE

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

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

Please make your check payable to **SLSA** in the amount of \$40 (\$25 for students). Mail payment with this form to:

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

# *Legal Secretaries, Incorporated*

## **LEGAL SPECIALIZATION SECTIONS**

**CIVIL LITIGATION**

**CRIMINAL LAW**

**FAMILY LAW**

**LAW OFFICE ADMINISTRATION**

**PROBATE/ESTATE PLANNING**

**TRANSACTIONAL LAW**



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

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

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

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

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

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

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

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

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

**Method of Payment:** Check, payable to "LSI," enclosed  VISA  MASTERCARD   
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		<b>Family Law</b>
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		<b>Transactional Law</b>



**(PLEASE PRINT OR TYPE)**

NAME: MR./MRS./MS \_\_\_\_\_ PLS/CCLS/CLA/PARALEGAL  
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 LOCAL ASSOCIATION: \_\_\_\_\_ LSA/LPA  
 RESIDENCE PHONE ( ) \_\_\_\_\_ BUSINESS PHONE: ( ) \_\_\_\_\_  
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FAMILIAR WITH PRACTICE IN COUNTIES OF (Please indicate each County, not area):  
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### LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

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

\*Item available to LSI members only

(Prices effective 0508)

**LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM**

ITEM	UNIT PRICE	QUANTITY	TOTAL
<b>LSI BYLAWS AND STANDING RULES*</b> As currently adopted by the LSI Governors.	\$ 5.00		\$
<b>LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER</b> An 8 1/2" x 11" advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/02)	N/C		
<b>LSI LEGAL SPECIALIZATION SECTIONS BROCHURE</b> Lists Sections offered and reasons for joining. Includes Section Membership Application. (Rev. 2/08)	N/C		
<b>LSI MEMBERSHIP BROCHURE</b> Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application (Rev. 2/08)	N/C		
<b>LSI MEMBERSHIP PIN*</b> A 3/4" high oval gold-tone pin with blue and white enamel overlay. LSI logo in center and "Legal Secretaries, Incorporated" inscribed on circumference. For all LSI members.	3.00		
<b>LSI ROSTER*</b> Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.	N/C		
<b>MEMBERSHIP APPLICATION FORM*</b> An 8 1/2" x 11" form adopted 5/01 by LSI for use by all local associations. Includes request for Legal Specialization Sections information. Local associations may add second-page for supplemental information (Rev. 5/08) Can be transmitted as an e-mail attachment (Word format), if so requested.	N/C	<input type="checkbox"/> E-mail -or- <input type="checkbox"/> Printed	
<b>NEW MEMBER PACKET*</b> A 2-pocket folder containing letter from LSI President, LSI membership information, Specialization Sections Membership Application, list of benefits and providers, CCLS information, Legal Professional's and Law Office Procedures Manual flyer and Code of Ethics. Local associations may insert additional material. For new local association members only.	N/C		
<b>PRESIDENT'S PENDANT*</b> A 1" high oval gold-tone pendant with blue and white enamel overlay. LSI logo in center and "Legal Secretaries Association" inscribed on circumference. Eye for necklace chain on back. For local association presidents.	7.00		
<b>PRESIDENT'S PIN*</b> Same as pendant (see above), but with pin on back.	7.00		
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TOTAL ORDER =			\$
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PLEASE LIMIT THE QUANTITIES OF NO-CHARGE ITEMS ORDERED TO MINIMAL IMMEDIATE REQUIREMENTS. COMPLETE PAYMENT INFORMATION BELOW AND MAIL COMPLETED ORDER FORM TO LEGAL SECRETARIES, INCORPORATED, CORPORATE OFFICE, P O BOX 660, FORTUNA, CA 95540-0660; OR, FAX TO (707) 725-1344. CHECK OR CREDIT CARD INFORMATION MUST BE INCLUDED. ORDER WILL BE MAILED OR SHIPPED WITHIN 10 DAYS OF RECEIPT, SUBJECT TO AVAILABILITY.

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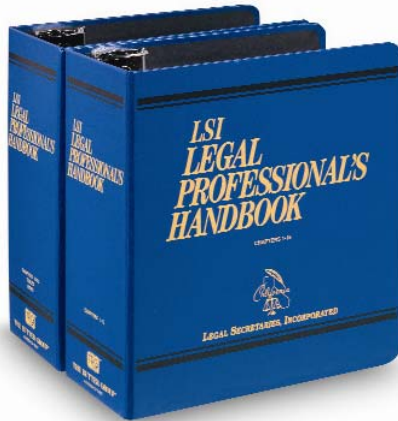
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**LEGAL SECRETARIES, INCORPORATED**

# LEGAL PROFESSIONAL'S HANDBOOK

... THE *ULTIMATE RESOURCE* GUIDE!



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

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

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- Commencement of Civil Actions
- Discovery in Civil Actions
- Pretrial and Judgment in Civil Actions
- Postjudgment Proceedings
- Civil Appeals and Writs
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- Unlawful Detainer
- Federal Civil Procedure and Appeals
- Bankruptcy
- Family Law
- Adoptions
- Criminal Law and Procedure
- Probate Proceedings: Decedents' Estates; Guardianships/Conservatorships; Trust Law
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- Corporations
- Limited Partnerships
- Intellectual Property Law: Copyrights; Trademarks; Patents
- Miscellaneous General Information

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<p style="text-align: center;"><i>Legal Secretaries, Incorporated</i> <b>LEGAL PROFESSIONAL'S HANDBOOK</b></p> <p style="text-align: center;">2 Volumes • Over 2550 Pages</p> <p>LSI Members-Only Price ..... \$233.75 Nonmembers Price ..... \$275 (includes shipping)</p>	NAME _____ PHONE (____) _____ E-MAIL ADDRESS _____ STATE BAR NO. _____ FIRM _____ ADDRESS _____ SUITE _____ CITY _____ STATE _____ ZIP _____						
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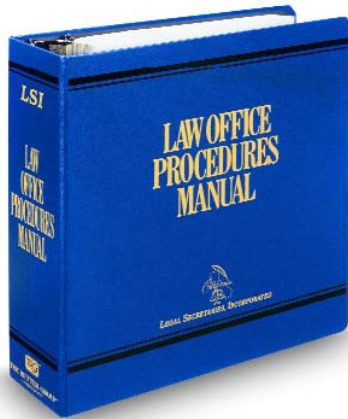
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**LEGAL SECRETARIES, INCORPORATED**

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Do NOT send future Updates. I understand this book has limited value without Updates. (Cost of 522-pg. 2009 Update #2 was \$40.)

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Please bill me

<p style="text-align: center;"><b>Legal Secretaries, Incorporated</b> <b>LAW OFFICE PROCEDURES MANUAL</b> Over 1200 Pages LSI Members-Only Price ..... \$126.65 Nonmembers Price ..... \$149 (Includes shipping)</p>	NAME _____ PHONE (____) _____ E-MAIL ADDRESS _____ STATE BAR NO. _____ FIRM _____ ADDRESS _____ SUITE _____ CITY _____ STATE _____ ZIP _____
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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.*

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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, refer to <http://ceb.com/LSI/>

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7448 Skyway, Paradise, California 95969  
Work - (530) 877-6332 -- Fax (530) 877-7054  
[paralegalbam@sbcglobal.net](mailto:paralegalbam@sbcglobal.net)

**LEGAL SECRETARIES, INCORPORATED  
MEMBERSHIP LIST AS OF 7/31/10**

Total Members (Fiscal Year-end 4/30/10)	Association		New Members	Transfer Members	Continuing Members	Total Members
35	Alameda County	LSA	10	2	27	39
21	Antelope Valley	LSA				0
49	Beverly Hill/Century City	LSA	12		36	48
22	Butte County	LPA	2		16	18
29	Capitol City	LPA	7		21	28
8	Conejo Valley	LPA	0		5	5
22	Desert Palm	LPA	2		10	12
24	El Dorado County	LPA	1		15	16
43	Fresno County	LPA	8		35	43
46	Humboldt County	LPA	6		21	27
30	Imperial County	LPA	4		24	28
35	Livermore-Amador Valley	LPA	3		23	26
55	Long Beach	LSA	4		52	56
34	Los Angeles	LSA	15		24	39
16	Marin County	LPA	1		13	14
35	Merced County	LPA	4		26	30
20	Monterey County	LSA			8	8
66	Mt. Diablo	LPA	10		51	61
16	Napa County	LSA			15	15
80	Orange County	LSA	6		35	41
22	Palo Alto	LSA	5		18	23
26	Placer County	LPA	3		20	23
13	Redding	LPA				0
23	Rio Hondo District	LPA	5		12	17
27	Riverside	LPA	4		16	20
158	Sacramento	LSA	30		117	147
205	San Diego	LSA	58		133	191
60	San Fernando Valley	LSA	6		28	34
46	San Francisco	LPA	5		28	33
30	San Gabriel Valley	LSA	5		16	21
80	San Mateo County	LSA	7		63	70
28	Santa Barbara	LSA	3		19	22
52	Santa Clara County	LSA	7		43	50
20	Santa Cruz County	LPA			7	7
23	Santa Maria	LPA	2		12	14
38	Sonoma County	LSA	10		24	34
8	Southern Butte	LSA			9	9
37	Stanislaus County	LPA	3		33	36
46	Stockton-San Joaquin	LPA			29	29
4	Trinity County	LSA			4	4
25	Ventura County	LPA	1		16	17
28	Members at Large					20
<b>1685</b>	<b>1ST QUARTER TOTALS</b>					<b>1375</b>

Membership list as of 7/31/10

*LEGAL SECRETARIES, INCORPORATED*

ORGANIZED 1934



*Presents:*

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### 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: \_\_\_\_\_

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

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

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

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

**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: _____            |

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Please submit to:

**Anne French**  
**c/o Downey Brand LLP**  
**621 Capitol Mall, 18<sup>th</sup> Floor**  
**Sacramento, CA 95814**  
**E-mail: afrench@downeybrand.com**

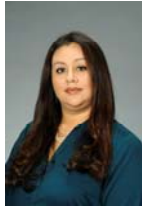


# SLSA COMMITTEE CHAIRMEN

## 2010-2011

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awatterson@somachlaw.com



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afrench@downeybrand.com



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(916) 442-1111  
forgeurd@gtlaw.com



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Tammy Hunt, CCLS  
(209) 937-8805  
tammy.hunt@tlhunt.org



Executive Advisor  
Jennifer Rotz  
(916) 329-3139  
jrotz@murphyaustin.com

## Editor's Note

by *Liz Gideon*

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Go instead where there  
is no path and leave a  
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