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Sacramento Legal Secretaries Association

THE LEGAL EAGLE



September Events

- **September Lunch Lesson - September 13.** This lunch lesson will be held at Downey Brand LLP, 621 Capitol Mall, 18th Floor, Sacramento. You can register through Anne French at afrench@downeybrand.com. *See page 33.*
- **September Regular Dinner Meeting – September 20.** This meeting will be held at the Courtyard Marriott - Midtown Sacramento, 4422 Y Street, Sacramento. You can register online through our website (www.slsa.org) or contact Shelly Reyes at reservations@slsa.org. *See page 19.*

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!





Dawn Forgeur, CCLS

President's Message

by Dawn Forgeur, CCLS

It was SLSA's pleasure to host June Coleman, Esq. for our August dinner meeting. June spoke to attendees regarding the Fair Debt Collection Practices Act, debt collection, and identity theft. She is also the President of the Sacramento County Bar Association and we heard a brief update on what is happening with the SCBA. You can read a recap of her talk in this bulletin in the Speaker Spotlight.

Anne French and her Lunch Lesson team have put together the next Lunch Lesson, which will be held on September 13. The topic is "Citations Part 2: Blue Book" and will be held at Downey Brand's office. The registration form has already been emailed out to the members and is included in this bulletin. Seating is limited, so be sure to sign up as soon as possible!

I am excited to announce that Jennifer Rotz and Jennifer Sachs are SLSA's Programs Chairs for the remainder of this fiscal year! Thank you for volunteering, the Board and I look forward to working with you this year.

Lynne and I attended LSI's August Quarterly Conference from August 17-19, 2012. At the first session of the Board of Governors meeting on Saturday, it was announced that LSI's Executive Advisor, Brooke Mansfield, CCLS, resigned her position. LSI's Bylaws state that if the immediate LSI Past President is unwilling to serve, that position shall remain vacant, so President Sandra Jimenez was unable to appoint another Executive Advisor. The LSI Executive Advisor

has several duties in addition to advising the current president, including serving as the Chairman of the Nominations and Elections Committee. These duties have been assigned to other LSI officers and chairmen.

Maria Bishop, CCLS, is the Editor-in-Chief of several LSI publications, such as the Law Office Procedures Manual (LOPM) and the Legal Professional's Handbook (LPH). Maria requested that if there was any new material that you would like to see added into the LOPM or LPH, please send it to her.

Per SLSA's Standing Rule 26, Maryanna Rickner's name was randomly selected out of our membership to attend this past quarterly conference. But Maryanna wasn't the only SLSA member who took advantage of the educational opportunities available at conference. With conference being held in Pleasanton, several other members were there on Saturday: Lynne Koroush, Elizabeth Bomke, CCLS, Launa Atkinson, CCLS, and Michelle Chavez, CCLS. I'm glad so many SLSA members made a showing (and most of them won one of the opportunity drawing prizes!).

As always, please feel free to email me any questions you may have. See you at the dinner meeting!



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, Lynne Koroush, to her work address at Greenberg Traurig, LLP, 1201 K Street, Ste. 1100, Sacramento, CA 95814.

August Membership Chair Report

by Lynne Koroush

Welcome, and congratulations to the following new SLSA members, who were inducted at the August 16, 2012, regular membership meeting.

Active Membership

Heather Deen -- Heather is a legal assistant with Power & Miller, and has worked as a legal professional since 2000. She specializes in litigation. Heather celebrates her birthday on April 1, and enjoys water sports.

Associate Membership

Nuriya Safarova -- Nuriya is presently seeking employment in the legal field, and has been a legal professional since 2010. She specializes in bankruptcy, business/corporate law, family law, litigation, and real estate law. Nuriya celebrates her birthday on September 26, and enjoys reading, writing, and learning.

If you are interested in membership in SLSA, please contact Lynne Koroush at (916) 442-1111, or via e-mail at koroush1@gtlaw.com.



Nuriya Safarova and Lynne Koroush

Condolences



To SLSA's Governor, Melanie Herman. We were saddened to hear of the loss of Melanie's beloved grandfather, who passed away on August 15. SLSA offers its sincere sympathies to Melanie and her family, and asks that you keep them in your thoughts and prayers.

To SLSA's Secretary, Maimie Chyinski, on the loss of her cousin. Maimie and her family appreciate your thoughts and prayers during this time.

Get Well Soon!

Our best wishes for a speedy recovery go out to **Lorraine Bettencourt, CCLS, former LSI President**, who is recovering from surgery and was unable to be with us at the LSI Quarterly Conference in Pleasanton.

CHANGES?? UPDATES??

Are you an SLSA member who has moved? Changed jobs? Been promoted? Recently engaged or married? New addition to the family? We want to know about you!! Let us celebrate your accomplishments with you during the good times, and support you during the tough times. Please send your news to koroush1@gtlaw.com.

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 with the advertisement formatted like those currently posted on the "Employment Opportunities" page. Ads are usually posted within 48 hours.

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

Please contact Employment Chair Jaymie Moralez, at (916) 446-7979, or e-mail her at jmoralez@somachlaw.com. 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.

- **(8/20/12) Legal Administrative Assistant.** RagingWire Data Centers, Inc., is seeking full time person to handle a range of responsibilities including preparing initial versions of all client contracts (standard MSA and standard SLA), manage the contract signature process and distribute signed versions, create and distribute the client services version and NOC version of the signed SLA, draft letters and other correspondence. Review vendor contracts and non-disclosure agreements, review changes made by potential clients to RagingWire MSA and SLA, organize all incoming contracts, correspondence, requests for information, etc. Prepare census information and various government filings (e.g., annual state officer filings, court required bankruptcy claims against third parties. Prepare insurance applications for the company's risk management programs.

Will also act as first point of contact with the company's insurance brokers, determine priorities, and assist manager in addressing and responding to internal and external requests.

Maintain all relevant client contract information through Salesforce.com. Interact with colleagues regarding updates and other changes/modifications. Draft client change order language, maintain stock option spreadsheets, create and print individual stock options from templates. Maintain stock certificate spreadsheets, create and print individual stock certificates from templates, interact with employees at all levels and with all the company's departments. Perform various research projects as requested by department heads. Salary is depending upon experience. Medical benefits provided. Software used is Microsoft Word, Excel, and PowerPoint. Please email resume to tmanriquez@ragingwire.com. Position available immediately.

- **(8/10/12) Experienced Paralegal.** Stoel Rives LLP seeks an experienced paralegal to join its Sacramento office to work in the litigation practice group. Candidate must have a minimum of five years' experience in complex litigation, a working knowledge of litigation specific issues and software (e.g., civil procedure, Concordance, CaseMap, RealLegal Binder, etc.) and large database and electronic document management experience. The successful candidate will be organized, self-motivated, have working knowledge of state and federal court rules and practice, be a team player, and possess excellent written and verbal communication skills. Ideal candidate will have experience supporting attorneys at trial. Occasional travel may be required. Include cover letter and three references with resume. EEO/AA. Please apply online at our website: http://www.stoel.com/admin_openings.htm.

Employment Report/Positions Available (cont.)

by Jaymie Morales

- (08/03/2012) Legal Secretary.** Downey Brand LLP, Sacramento’s largest law firm, seeks a Litigation Secretary for its Downtown Sacramento office. Candidates must have significant (5+ years) experience in a litigation environment, and have thorough knowledge of federal and state court procedures and timelines. Requires 75+ wpm accurate typing, word processing and proficiency with MS Office applications. Ability to accurately proofread documents, set priorities and work under pressure is critical. Must have a positive attitude, strong written and verbal communication skills, impeccable attendance and punctuality, a strong work ethic, and be highly organized with an extreme level of attention to detail. Salary commensurate with experience, and firm-paid health benefits and parking are provided. Qualified applicants may submit a cover letter and resume in confidence to Camilla Arnds, Human Resources Director, via the firm’s web application: https://lawcruit.micronapps.com/sup/v3/lc_supp_app_frm.aspx?lawfirm=169&id=9. No telephone calls please.
- (7/26/12) Legal Assistant/Secretary.** El Dorado County firm with active estate planning, probate and conservatorship practice has immediate need for an experienced, full time legal assistant/secretary. The position requires excellent computer skills, ability to organize and manage a busy case load, attention to detail, and strong writing skills. Professional, friendly demeanor also necessary for regular client contact. 3 or more years experience as legal assistant or legal secretary is preferred. Wordperfect, Word, Excel, Acrobat proficiency required. Compensation depends on experience. Please email cover letter and resume to admin@guthrieandellerman.com.



Of Note

Beginning with the Labor Day weekend, it seems there is a holiday or more than one holiday every month between now and the end of the year. Please note the following holidays and the court closures for each:

Holiday	State Courts	Federal Courts
Labor Day – September 3, 2012	Closed	Closed
Columbus Day – October 8, 2012	Closed	Closed
Veteran’s Day – November 12, 2012	Closed	Closed
Thanksgiving Day – November 22, 2012 Day After Thanksgiving – November 23, 2012	Closed	Closed
Christmas Day – December 25, 2012	Closed	Closed
New Year’s Day – January 1, 2013	Closed	Closed

CCLS Exam Application Deadline

If you would like to submit a late application to take the October 20, 2012, CCLS Exam, you have until September 20, 2012. You must submit your late application with an additional late fee of \$30 and if your application is accepted and if there is space available, you will be able to take the exam.

The application deadline for the March 16, 2013, exam date is January 15, 2013.

**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:

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

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

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

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

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

SIGNATURE OF APPLICANT _____ DATE _____
SPONSOR _____ APPLICATION APPROVED _____

~ ~ LSI LEGAL SPECIALIZATION SECTIONS MEMBERSHIP ~ ~

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

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

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

FOR LSI LEGAL SPECIALIZATION SECTIONS MEMBERSHIP AND DUES INFORMATION, VISIT LSI'S WEBSITE AT www.lsi.org; 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

(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:

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



**Sacramento Legal Secretaries Association
Membership Renewal Invoice**

**Membership Period: May 1, 2012 – April 30, 2013
Due Date: May 1, 2012**

Make check payable to:
Sacramento Legal Secretaries Association

Amount Due: **\$40**
Renewals are due May 1, 2012.
There will be a late fee of \$5 after June 1, 2012.

Return the completed invoice and full payment to:
**Deseree Gamayo, Treasurer
Sacramento Legal Secretaries Association
c/o Stone & Graves
11335 Gold Express Dr., Suite 145
Gold River, CA 95670**

MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

NAME: _____
BIRTHDAY: _____
TITLE: _____
EMPLOYER: _____
BUSINESS ADDRESS: _____
CITY, STATE & ZIP: _____
BUSINESS PHONE: _____
BUSINESS FAX: _____
BUSINESS E-MAIL: _____ (for vital updates/reminders)
RESIDENCE ADDRESS: _____
CITY, STATE & ZIP: _____
RESIDENCE PHONE: _____
RESIDENCE E-MAIL: _____ (for vital updates/reminders)

YOUR SPECIALTY:

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

MAILING/LISTING INFORMATION:

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

INVOLVEMENT:

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

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

September 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10 <i>SLSA Executive Board Meeting</i>	11	12	13 <i>Lunch Lesson</i>	14	15
16	17	18	19	20 <i>Regular Dinner Meeting</i>	21	22
23	24 <i>Last Day to Submit Articles to the Legal Eagle</i>	25	26	27	28	29
30						

Dates to Remember

- **September 10 - SLSA Executive Board Meeting** (Location: Stoel Rives - Time: 6:00 p.m.)
- **September 13 - Lunch Lesson** (Location: Downey Brand - Time 12:00 –1:00 p.m.)
- **September 20 - Regular Dinner Meeting** (Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)
- **September 24 - Last Day to Submit Articles for the October issue of The Legal Eagle**
- **October 8 - SLSA Executive Board Meeting** (Location: Stoel Rives - Time: 6:00 p.m.)
- **October 18 - Regular Dinner Meeting** (Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)
- **October 22- Last Day to Submit Articles for the October issue of The Legal Eagle**
- **November 5 - SLSA Executive Board Meeting** (Location: Stoel Rives - Time: 6:00 p.m.)
- **November 15 - Regular Dinner Meeting** (Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)
- **November 16-18 - Conference** (Location: Hilton Palm Springs — 400 East Tahquitz Canyon Way, Palm Springs, CA 92262)
- **November 19 - Last Day to Submit Articles for the October issue of The Legal Eagle**



Benefit Highlights

It's time for Back to School shopping and www.workingadvantage.com has a ton of stores listed on their website with discounts that you can use! Save on all the things you need from backpacks, books, clothing, computers, dorm room supplies, school supplies, shoes, sports, and test preparation and tutoring. Interested? You can email president@slsa.org to get LSI's member number to take advantage of these discounts.



CAPs

by Melanie Herman

SLSA's goal for 2012-2013 is 75,000! And we are well on our way at a total of 27,730, as of August 21, 2012, leaving only 47,270 more to go! SLSA would like to give a big thank you to Launa Atkinson, CCLS, Elizabeth Bomke, CCLS, Michele Chavez, CCLS, Cyrene Farrell, CCLS, and Maryanna Rickner for attending LSI's First Quarterly Conference and helping SLSA gain CAPs! Remember, October is just around the corner, so if you are signed up to take the CCLS exam and/or have signed up for a CCLS study group, let us know! Help us capture CAPs and reach our goal. E-mail Melanie and let her know that you earned SLSA points – don't make her harass you. Her e-mail is mherman@perkins-lawoffice.com. **See the Chapter Achievement Reporting Form in this issue on page 17 for more ways to earn points.**

CCLS Quiz

by Launa Atkinson, CCLS

Gregg Reference Manual

Select the best word

1. ____ Ellen's [a] medal [b] metal [c] mettle was tested when she tried out for the Olympics.
2. ____ Donna's [a] palette [b] pallet [c] palate was filed with a beautiful array of colors.
3. ____ The newscaster warned that there was [a] eminent [b] imminent [c] immanent danger in traveling during this storm.
4. ____ [a] Fewer [b] Less effort was shown by the organization last week.
5. ____ She was [a] reluctant [b] reticent to agree to the changes.

[T]rue or [F]alse

1. ____ Almost all small letter abbreviations made up of single initials require a period after each initial but no space after each internal period.
2. ____ Certain contractions can have only one meaning.
3. ____ You should spell out indefinite amounts of money.
4. ____ Do not capitalize former, late, ex-, or -elect when used with title.
5. ____ Capitalize family titles when they are preceded by possessives (such as my, your, his, her, our, and their) and simply describe a family relationship.

Law Office Products/Management

by Lynne Koroush

Learning (and Loving) MS Windows 7 / MS Office 2010

My office recently made the progression from MS Office 2003 to MS Office 2010, which included an across-the-board, comprehensive upgrade to most of MS Office's applications, including the entire desktop appearance, Outlook, and Word 2010. If any of you are old enough to remember having to give up WordPerfect 5.0 and go to a Windows-based format, you have some idea what a huge change this is!!

When I first saw the new MS Office, I have to admit to being nervous and intimidated. I thought, "Oh, my gosh! I am never going to be able to learn this!" Practically everything about the new version looks different, is in a different place, and is called something different! For example, what in the world is a Ribbon? Snipping? Pinning? Backstage View? Navigation Pane? Contextual Tabs? Fortunately, my office offered excellent training and we had an amazing team of floor support for a full two weeks after launching the new version. I was VERY surprised and pleased at how quickly I caught on to the new layout, and realized after only a few days of using it that all the improvements and upgrades are actually very intuitive in nature.

While it would be impossible to explain and navigate through all of the changes, nor am I by any means an expert on the new version, I have highlighted some of the changes and new features below.

There are three main differences: 1) the introduction of the "ribbon"; 2) the removal of toolbars and menus; and 3) the introduction of the XML file format.

The Ribbon: Removal of Toolbars & Menus

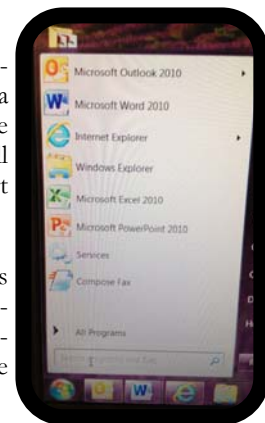
The ribbon looks like a bar across the top of the screen. It replaces the normal drop-down menus and toolbars and instead categorizes tool buttons into a series of tabs. Each tab is broken down into groups, which provide access to commands, galleries, and dialogue boxes. It can take some getting used to, though the interface design is said by Microsoft to make usage easier. In MS Word, for example, the track changes feature is now found on the ribbon's "Review" contextual tab. Footnotes, table of contents, and table of authorities are located under the "References" tab. If you want to insert a picture, clip art, create a table, or manage the headers and footers, these features are now housed in the "Insert" tab (pictured to the left). The ribbon format is present in all Microsoft applications, including Outlook, Word, Excel, PowerPoint, Access, etc.

XML File Format

This means two things -- the default format to save work has an X at the end of it (i.e., docx), and this file format cannot be read by 2003 (without downloading a 2007 viewer). Therefore, it is a good idea to save as a 2003 document, just to ensure usability on other computers.

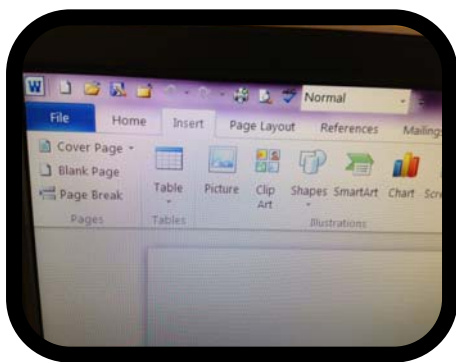
Other Features

- **Templates:** Office 2010 also comes complete with many new templates, giving the user much more selection and the ability to make their work look much more professional than similar templates within Office 2003.
- **Start Menu:** The Start Menu looks similar to the old one, however, there is now a space for the user to type the name of the desired program, which MS Office will automatically search for once you start typing (see photo example at right).
- **Libraries:** The Libraries feature houses the Control Panel, Desktop, My Documents, Pictures, Music, Videos, Downloads, and similar items in a cleaner, more organized location.
- **Contacts:** In Outlook, the contacts feature allows you to create an electronic business card for your contacts, as well as inserting a picture of the contact into their file.
- **Calendars:** A great new feature in the calendar mode is called "Scheduling View." This combines multiple calendars into one view and allows the user to schedule a meeting with all of the individuals displayed by simply double-clicking inside a gap. A meeting is then created addressed to all the attendees at the selected date and time.



I actually love the new MS Office! Once I let go of my fear that something which looks so different must be equally as difficult, I began to really enjoy using it. The design and programming team at Microsoft have done a great job of simplifying functions and processes, and obviously put a lot of thought and time into understanding what intuitively works for the user. In the coming months, watch for additional information on this upgrade, as well as tips and tricks to help make your transition easier.

Online information and help regarding the new version is available from a number of sources, including Microsoft's website, LinkedIn, Wiki, as well as video sessions on YouTube.





Melanie Herman

Governor's Report

by Melanie Herman

LSI's first quarterly conference was held on August 17, 18, and 19, 2012, in Pleasanton, California and was co-hosted by Alameda County Legal Secretaries and Livermore-Amador Valley Legal Professionals Association. With it being fair season, the theme was "Blue Ribbon Fair" and the hosting associations did a great job with the decorations and getting the vendors involved with the theme. There was even a guest appearance by a Moo-Cow! I attended the Board of Governors Meeting and the Governors' luncheon on Saturday. There were written reports and oral reports from LSI's officers and chairmen who were called to the conference. Below I will provide you with the pertinent items that were discussed and presented.

The Marketing Committee reported on the status of its work with Bop Design to rebrand LSI. At SLSA's September 2012 dinner meeting, I will be presenting the top four choices that the Marketing Committee provided all Governors to review and provide feedback. Mary J. Beaudrow, CCLS, stressed that, currently, there is no recommendation by the Marketing Committee. By providing these four samples, it is just seeking general feedback and discussion. Lastly, it was indicated that the allotted funds for the rebranding project have been depleted and if we wish for further assistance from Bop Design, we will be required to pay a substantial hourly fee.

Additionally, the Marketing Committee made a recommendation to rescind the recommendation made at the February 2012 Conference stating "That all marketing committee members be called to every conference and that they be reimbursed by the Marketing budget. To be effective May 1, 2012." Astrid B. Watterson, CCLS, LSI's Parliamentarian, explained that since the LSI President has the discretion to request the attendance of any committee member at conference, the recommendation made at the February 2012 Conference is duplicative and unnecessary. (LSI Standing Rule, Rule 16.1.) The recommendation to rescind was presented to the Governors for a vote and it was approved.

Of course there were still questions of uncertainty regarding the point of order made at An-

nual Conference, as it related to the Ad Hoc committee's involvement in the rebranding of LSI. At the Governors' luncheon, Astrid B. Watterson, CCLS, LSI's Parliamentarian, did a phenomenal job of providing the Governors with a chronology of the events that led up to the point of order, which she later presented at the second half of the Board of Governors meeting. Due to its size, I am unable to provide the full chronology in this report, but in short:

At the November 2011 Conference:

- A motion to change LSI's name was made;
- A motion to postpone the motion [to change the name] to May 2012, was presented and passed;
- A motion that LSI hire a marketing firm to market LSI effective immediately, was presented and passed;
- A motion to appoint an ad hoc committee to investigate the name change and provide a recommendation of a marketing consultant and its findings at the February 2012 Conference, was presented and passed.

At the February 2012 Conference:

- A motion to vote on the recommendations of the Ad Hoc Committee be postponed until the May 2012 Conference, was presented and failed;
- The Ad Hoc Committee presented its recommendations, which were adopted;
- The maker of the motion to change LSI's name, made at the November 2011 Conference, requested permission to withdraw the motion. Permission was granted and the motion was withdrawn. No vote was ever held on said motion.

At the May 2012 Conference:

- A point of order was made regarding the Ad Hoc Committee's involvement in the continued marketing of LSI. The President ruled in favor of the point of order, citing that LSI's Bylaws have a provision for a



Melanie Herman and Moo Cow

Parliamentarian's Corner

by Astrid Watterson, CCLS

What happens if a motion was introduced that you thought more information may be needed? For example, what if we had a motion to change our name to Legal Professionals Association? The motion would require you to address that particular change – the name of the association. However, what would be involved? How much would it cost? Who would need to do the work to get it changed? Would we need the assistance of a lawyer? How would this impact our marketing materials, our website, our logo? Is this something that we have money for? How much time would it take? You may indeed have all of these questions, and perhaps not all of them were answered during the debate of the actual motion – changing the name of the association. What can be done?

According to Robert's Rules of Order, you can make a motion to postpone the current motion to the next meeting or to a specific date and time. This particular motion can be adopted by the majority of those present, it

can be amended to change the time or location, and it can be debatable. First you need to handle the motion to postpone. If the members present approve to postpone the motion to the next meeting, then the motion to postpone passes and the motion to change the name will come up right after unfinished business at the next meeting. If the motion to postpone fails, then you revert back to the original motion to change the name of the association.

Making a motion to postpone is not necessarily a delay tactic, it can be used to gain more information on the subject at hand. Sometimes, at the heat of the moment, someone can make a motion without thinking through the entire consequences of the actions you just asked everyone to vote on. If you want more information that isn't immediately available during the debate, then it would be prudent to introduce a motion to postpone to a different time when you can gather said information and vote knowing exactly what you are getting into.



Astrid Watterson, CCLS

“Making a motion to postpone is not necessarily a delay tactic, it can be used to gain more information on the subject at hand.”

~Astrid Watterson, CCLS

Honorary Member

by Dawn Forgeur, CCLS

SLSA, like most organizations, has people who stand out when it comes to contributions that make a difference. John Baldwin is one such individual. Although he was not a member of SLSA, he has, nevertheless, been a regular and welcome presence in SLSA. Each year, for the past several years, John has created the script for our mock trial in December. The scripts are his own inspiration and storyline, and each one is filled with humor, creativity, and relevance to the legal profession. We eagerly anticipate each new script, and look forward to seeing it played out by the members of our legal community. In recognition of John's support and valued contributions to SLSA, the members of SLSA voted to confer the status of "honorary member" upon him. John and his wife, Robyn, accepted our invitation to attend our August dinner meet-

ing and SLSA presented him with a certificate acknowledging his honorary membership. John accepted the LSI Code of Ethics, and was pleased to be inducted as an honorary member.

Please join us in congratulating John, and be sure to welcome him as one of our newest members!



Lynne Korousb, John Baldwin, Robin Baldwin, and Dawn Forgeur, CCLS

LSI Rebranding

by Dawn Forgeur, CCLS

“The SLSA Board invites your comments and opinions on these logos so that we may respond to LSI’s Marketing Committee.”

~Dawn Forgeur,
CCLS

At the August conference, the LSI Marketing Committee presented an update on their marketing efforts with Bop Design, along with four possible new logos for LSI. We have included a copy of those logos in this month’s issue for you to review. The name “California Legal Edge” was a name that LSI’s Marketing Committee thought made a great new name for the quarterly magazine, which is currently named “The Legal Secretary.”

The SLSA Board invites your comments and opinions on these logos so that we may respond to LSI’s Marketing Committee.

Below is the message received from LSI Vice President and Marketing Committee Chairman, Mary J. Beaudrow, CCLS, regarding these logos.

Please find the four choices that the Marketing Committee has narrowed down for a new logo for LSI. Before the process of re-branding LSI can move forward we much choose a logo that fully

represents LSI and its purpose. As reported at the August Quarterly Conference, the marketing committee requested feedback from the members of LSI to ensure that we are moving in the right direction.

The members were also advised that if Bop Design is requested to provide additional ideas for a new logo, LSI will be charged \$125 per hour to do so.

The marketing committee is putting forth every effort to move this project forward as quickly as possible.

Please provide your comments and suggestions to me no later than September 28, 2012.

Mary J. Beaudrow, CCLS
LSI Vice President



Logo Concept #1



Logo Concept #3



PMS 356 C
PMS 540 C



CHAPTER ACHIEVEMENT REPORTING FORM

Each association in LSI participates every year in the Chapter Achievement contest. An award of \$250 is presented by LSI to the highest scoring association in each membership category at the Annual Conference of LSI. Chapter Achievement Points (CAPs) are tracked during the year by SLSA's Governor. This covers activities from April 1, 2012, through March 31, 2013. This form's purpose is to track each member's activity during the course of the fiscal year. **Please complete this form each time you attend a function and mail it to SLSA's Governor.** If you attend a function and are not sure if it applies, include it below on the blank line provided and it will be determined if it applies.

Date of Event

Event

- _____ I submitted an article to *The Legal Secretary* magazine. (50 points)
- _____ I attended an LSI Quarterly or Annual Conference. (50 points)
- _____ I attended an Officer/Chairman Workshop at the Annual Conference.
How many? _____ (25 points)
- _____ I belong to an LSI-sponsored credit union. (100 points)
- _____ I am insured through an LSI plan. (100 points)
- _____ I rented a car through Hertz with the LSI discount. (200 points)
- _____ I took the CCLS exam - Test Date: _____. (100 points)
- _____ I passed the CCLS exam - Test Date: _____. (200 points)
- _____ I submitted questions to LSI for use on the CCLS Mock exam.
How many? _____. (25 points per question)
- _____ I recertified as a CCLS during the 2012-2013 fiscal year. (50 points)
- _____ I attended another association's monthly meeting, installation, or other function. (50 points)
- _____ I attended an educational workshop or seminar sponsored by SLSA or another local
association. (25 points)
- _____ I attended an educational workshop or seminar sponsored by a Forum, CEB, or
The Rutter Group. (25 points)
- _____ I am a member of at least one Legal Specialization Section. (50 points)
- _____ I am a member of all six Legal Specialization Sections as of March 31, 2013. (100 points)
- _____ I attended a Legal Specialization Section Seminar at Quarterly or Annual
Conference. How many? _____. (50 points per seminar)
- _____ 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 purchased the *Legal Professional's Handbook* (LPH) between April 1, 2012, and
March 31, 2013. (200 points)
- _____ I purchased the *Law Office Procedures Manual* (LOPM) between April 1, 2012,
and March 31, 2013. (200 points)
- _____ I purchased updates to the LPH between April 1, 2012, and March 31, 2013. (100 points)
- _____ I purchased updates to the LOPM between April 1, 2012, and March 31, 2013. (100 points)

Name: _____ Email: _____

If you have any questions or would like to email this form, you can reach the Governor at governor@slsa.org, otherwise you can mail this form to:

Sacramento LSA
Attn: Melanie Herman, Governor
Perkins & Associates
300 Capitol Mall, Ste. 1800
Sacramento, CA 95814

Legal Procedures

Ex Parte Application Filing Tips By Barbara Haubrich-Hass, ACP/CAS

Your attorney comes into your office to talk to you about a case development. In that particular case, the pre-trial motion filing cut-off is only days away, and an unexpected discovery dispute has arisen. Your attorney says, "I need a motion to compel the deposition of witness, I. C. Everything, and I need the motion heard next week!" What do you do? Thankfully, California Rules of Court ("CRC") Rules 3.1200 through 3.1207 provide a way to request an ex parte application from the court for an order shortening time to file and serve a notice of motion for particular relief sought.

Ex Parte relief is requested when it is impractical or impossible to wait the minimum statutory period for the court to hear a regular motion. CRC Rules 3.1200 through 3.1207 set forth very specific guidelines for when and how ex parte relief is to be requested. A court will only grant ex parte relief for good cause. The party seeking relief must demonstrate irreparable harm, immediate danger, or some other statutory basis for granting relief.

Background:

1. Important Cut-Offs to Remember: California Code of Civil Procedure ("CCP") § 2024.020(a) states that discovery in a civil matter must be completed on or before the 30th day before the initial trial date, and to have motions concerning discovery heard on or before the 15th day before trial. Additionally, CCP § 2024.030 states that expert witness discovery must be completed on or before the 15th day, and to have all motions concerning expert witnesses heard on or before the 10th day prior to the initial trial date.
2. Motion Filing Requirements: CCP § 1005(b) states that all motions shall be served and filed at least 16 court days prior to the hearing. If the notice is served by mail within California, the notice period shall be increased by five calendar days, 10 calendar days if either the place of mailing or the place of address is outside of California but within the United States, 20 calendar days if either the place of mailing or the place of address is

outside the United States, and if the notice is served by facsimile or overnight mail, the notice period is increased by two calendar days.

3. Ex Parte Application: CCP § 1005(b) and CRC Rule 3.1300(b) both state that the Court may prescribe a shorter time for filing and service of a Motion than the time specified in CCP § 1005.

Procedural Requirements:

Parties seeking ex parte relief must comply with all of the statutes and rules applicable to the specific relief being sought. Below are a few of the essential requirements that parties must comply with:

1. Required Documents: A request for ex parte relief must be in writing and must include all of the following documents: "(1) An application containing the case caption and stating the relief requested; (2) A declaration in support of the application making the factual showing required under Rule 3.1202(c); (3) A declaration based on personal knowledge of the notice given under Rule 3.1204; (4) A memorandum; and (5) A proposed order." [CRC Rule 3.1201]
2. Contents of the Application: "(a) An ex parte application must state the name, address, and telephone number of any attorney known to the applicant to be an attorney for any party or, if no such attorney is known, the name, address, and telephone number of the party if known to the applicant. (b) If an ex parte application has been refused in whole or in part, any subsequent application of the same character or for the same relief, although made upon an alleged different state of facts, must include a full disclosure of all previous applications and of the court's actions. (c) An applicant must make an affirmative factual showing in a declaration containing competent testimony based on personal knowledge of irreparable harm, immediate danger, or any other statutory basis for granting relief ex parte." [CRC Rule 3.1201]

3. Time of Notice to Other Parties: "A party seeking an ex parte order must notify all parties no later than 10:00 a.m. the court day before the

See Legal Procedures, Page 17

“Ex Parte relief is requested when it is impractical or impossible to wait the minimum statutory period for the court to hear a regular motion.”



Legal Procedures (cont.)

Ex Parte Application Filing Tips

By Barbara Haubrich-Hass, ACP/CAS

ex parte appearance, absent a showing of exceptional circumstances that justify a shorter time for notice.” [CRC 3.1203]

4. Content of Notice: “When notice of an ex parte application is given, the person giving notice must: (1) State with specificity the nature of the relief to be requested and the date, time, and place for the presentation of the application; and (2) Attempt to determine whether the opposing party will appear to oppose the application.” [CRC Rule 3.1204(a)]

5. Declaration Regarding Notice: “An ex parte application must be accompanied by a declaration regarding notice stating: (1) The notice given, including the date, time, manner, and name of the party informed, the relief sought, any response, and whether opposition is expected and that, within the applicable time under Rule 3.1203, the applicant informed the opposing party where and when the application would be made; (2) That the applicant in good faith attempted to inform the opposing party but was unable to do so, specifying the efforts made to inform the opposing party; or (3) That, for reasons specified, the applicant should not be required to inform the opposing party. If notice was provided later than 10:00 a.m. the court day before the ex parte appearance, the declaration regarding notice must explain the exceptional circumstances that justify the shorter notice.” [Rule 3.1204(b)(c)]

6. Service of papers: “Parties appearing at the ex parte hearing must serve the ex parte application or any written opposition on all other appearing parties at the first reasonable opportunity. Absent exceptional circumstances, no hearing may be conducted unless such service has been made.” [Rule 3.1206]

7. Personal Appearance Requirements: A party seeking ex parte relief must personally appear to present the application, unless the relief sought falls into three narrow categories: “(1) Applications to file a memorandum in excess of the applicable page limit; (2) Applications for extensions of time to serve pleadings; (3) Setting of hearing dates on alternative writs and orders to show cause; and

(4) Stipulations by the parties for an order.” [Rule 3.1207]

Paralegal Tip

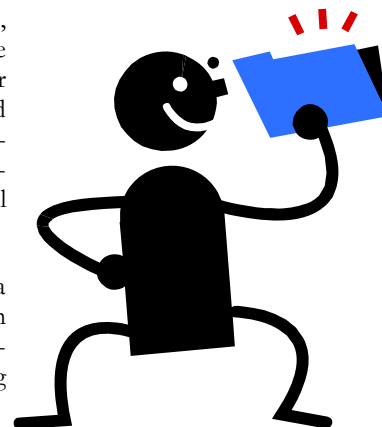
When my attorney comes to me and tells me that he needs a motion heard next week, what he is really telling me is that I need to write a draft motion and ex parte application for his review and to have it prepared and ready for filing immediately. When faced with this task, this is how I go about it. As always, do not implement these tips without your attorney’s approval.

1. I check on the court’s website for the county within which I am filing the ex parte application to read the local rules of court for filing an ex parte application. Each county has their own local rules of court that you must follow in order to file an ex parte application.

2. I check my attorney’s calendar to see when he is available for the ex parte hearing. This will provide me with an internal deadline to finalize and file the documents so that the hearing can be heard on a date that my attorney is already available.

3. I do not call the court clerk to secure a date for the ex parte hearing until after I have prepared the motion and ex parte application, and the attorney approves it for filing. The reason I wait until the documents are prepared is because once you obtain the date for the ex parte hearing, the clock starts ticking on the deadline to file the documents with the court. For example, in Kern County Superior Court, the ex parte documents must be filed with the court no later than 12:00 noon the day before the scheduled hearing time. Therefore, I wait until the documents are prepared, then I call the court to obtain the date, making it easier and less stressful to meet the very narrow filing deadline.

4. The Ex Parte Application will require a filing fee. If the court requires the actual motion to be filed at the same time as the Ex Parte Application, then you will need an additional filing fee for the motion.



LEGAL SPECIALIZATION SECTIONS Of LEGAL SECRETARIES, INCORPORATED

2011-2012 MEMBERSHIP APPLICATION/ANNUAL RENEWAL FORM

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

Mail to: **Cheryl L. Kent, PLS, CCLS, Legal Specialization Sections Coordinator**
5534 Blackbird Drive, Pleasanton, CA 94566

Enclosed is payment of my dues for the fiscal year 8/1/11 through 7/31/12 for the following Section(s). Please check appropriate boxes below for the sections you are joining.

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- Civil Litigation
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YEARS OF LEGAL EXPERIENCE: _____

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Sacramento Legal Secretaries Association

Dinner Meeting - September 20, 2012

Vendor of the Month:

**Compex
Legal**

Speaker:
William A. Muñoz, Esq.
of
Murphy Pearson Bradley & Feeny

Topic:
**"Ethics, Confidentiality, and
Avoiding Malpractice"**

5:30 – 6:15 p.m. Meet & Greet
6:15 – 8:00 p.m. Dinner Meeting
Courtyard Marriott – Midtown Sacramento
4422 Y Street, Sacramento
\$25 SLSA Members
\$28 Non-Members

RSVP by Tuesday, September 18. Checks should be made payable to SLSA, and mailed to Shelly Reyes, Registration/Reception Chair 2012-2013, c/o Law Office of Robert J. Binns, 3620 American River Drive, Suite 175, Sacramento, CA; fax: 916.487.6314. **NOTE: Cancellations must be received 48 hours in advance for a refund. No-Shows will be billed.**

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ENTRÉE:

Asian Buffet

(includes sweet & spicy grilled chicken salad, thai noodle salad, teriyaki chicken, oriental barbecued glazed seasonal fish, basmati rice, stir-fry vegetables, coconut rum cake, sesame cookies, seasonal sliced fruit, and Starbucks coffee and iced tea.)



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

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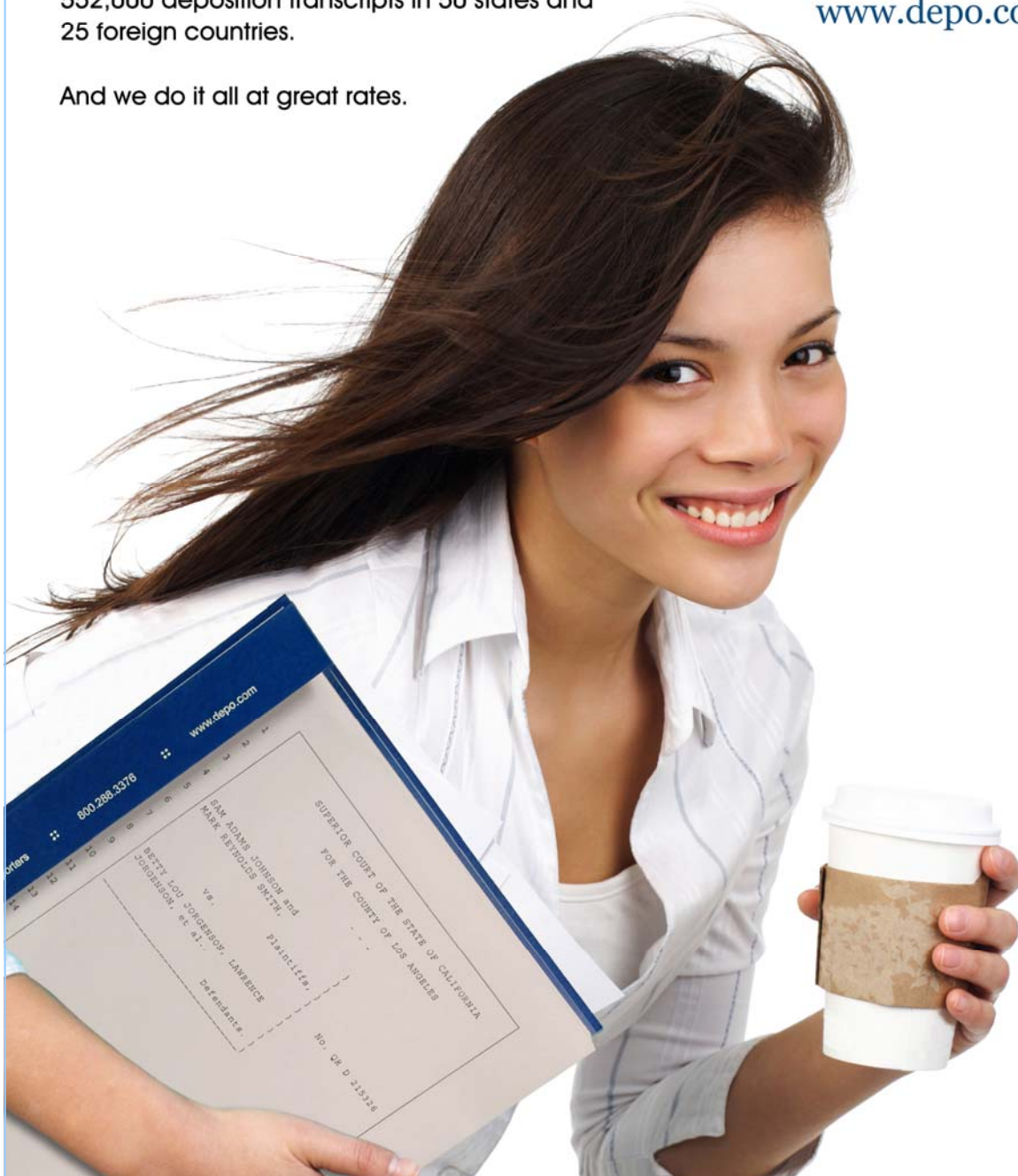
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Governor's Report (cont.)

by *Melanie Herman*

standing Marketing Committee, therefore such an Ad Hoc Committee is improper. Although the point of order was correct and ruled on as such, the Ad Hoc Committee recommendations are still intact as adopted and the only change is the people who are now handling the rebranding project.

As I discussed in my last report and at SLSA's July dinner meeting, LSI's Parliamentarian, Astrid B. Watterson, CCLS, presented a motion to amend LSI's Bylaw Article XIX, section 2, subsection (b), was presented and carried. LSI's Bylaw Article XIX, section 2, subsection (b), will now read, in part, "... An affirmative vote of 2/3 of the Local Associations shall be required for the adoption of the proposed amendment. A Bylaw amendment adopted by the Local Associations shall become effective upon the expiration of the 45-day period following the date of mailing of the notice by the Parliamentarian unless the proposed amendment provides otherwise..."

Lastly, LSI's Executive Committee gave notice of another Bylaw amendment, which will be presented and voted on at the November 2012 Conference, as follows: "The Executive Committee hereby gives notice of a Bylaw amendment to LSI Bylaw Article XIV, section 6, to insert the following language at the end: Local associations who have not complied with the annual reporting requirements of the Internal Revenue Service and Franchise Tax Board and have not provided proof of said filing to the LSI Treasurer shall not be entitled to vote unless the required proof has been submitted." During discussion at the Governors' luncheon, it was stressed that once you lose your non-profit status, it is extremely difficult to obtain it again. By adding this language to Bylaw Article XIV, section 6, the Executive Committee is simply trying to encourage local associations to file so that there is no possibility of losing its non-profit status.

Should you have any questions or wish for additional information, please do not hesitate to contact me.



Legal Procedures (cont.)

Ex Parte Application Filing Tips

By *Barbara Haubrich-Hass, ACP/CAS*

5. Twenty-Four (24) hours' notice must be given to opposing counsel of the ex parte hearing. When calling opposing counsel to place them on notice of the ex parte hearing, I first ask to speak to the attorney. It is always best to try to speak with an attorney first. If the opposing attorney is not available, the next person I ask to speak to is the opposing attorney's paralegal. If the paralegal is not available, I then ask to speak to a person authorized to accept ex parte hearing notification on behalf of the firm. I jot down on a piece of paper the date and time that I made the telephone call, the name of the person that I spoke to and his or her capacity (such as an attorney, paralegal, or secretary) and the substance of the conversation. This helps me when preparing the required declaration that notice has been given in a timely fashion.

6. As a matter of professional courtesy, in addition to mailing a copy of the documents, I fax or scan and e-mail a copy of the Ex Parte Application and Motion to opposing counsel on the same day that I provided notice of the hearing.

Barbara Haubrich-Hass, The California Litigator, publishes an e-zine that delivers simple discussions and strategies for the California civil litigation professional. Barbara's discussions focus on common paralegal and law office tasks, such as pre-litigation document gathering, document preparation, filing rules, law and motion, discovery, arbitration, trial, deadline calculation, and post-trial procedures. More information is available at <http://www.thecalifornialitigator.com>.





Maryanna Rickner

LSI First Quarterly Conference

by Maryanna Rickner

I was randomly selected by the Executive Board (in accordance with SLSA Standing Rule 26) as one of the members to attend the LSI Quarterly Conference in Pleasanton on August 17-19, 2012. I was elated to have such a wonderful opportunity bestowed upon me. The following is an overview of my experience at the conference.

On August 17, 2012, I checked into the Hilton Pleasanton at The Club in Pleasanton. I subsequently checked into the LSI First Quarterly Conference that was being co-hosted by the Alameda County LSA and Livermore-Amador Valley LPA with the theme of the Blue Ribbon Fair.

In the late afternoon, I attended the Continuing Education Council seminar "Effective and Ethical Use of Social Media & Networking in the Law Office." The speaker, Kevin L. Nichols, Principal, KLN Consulting Group discussed the professional and ethical implications of using social media (e.g., Facebook, Twitter, LinkedIn) in law offices, and the Rules of Professional Conduct for the American Bar Associ-

ation and the State Bar of California as they relate to social media. I found this seminar to be very interesting and quite eye-opening.

The Welcome Reception followed with the attendees being greeted to a décor of fair festivities and foods that included fresh fruit, pretzels, popcorn, etc. It was a great time for everyone to mingle and visit the various vendor stations.

Later that evening, I attended the Probate/Estate Planning Section seminar "Wills vs. Trusts." The speaker, Jennifer Lee Thaete, Esq., Certified Legal Specialist in Estate Planning, presented information regarding estate planning, the available options (will, revocable living trust, durable powers of attorney for property management/financial power of attorney, health care powers of attorney/advances health care directives), pros and cons, and issues of title, privacy and confidentiality. This seminar was full of valuable information that all of us could use, both professionally and personally.

On the morning of August 18, 2012, I attended the CCLS workshop "Legal Terminology." The speaker, Terrie Quinton, CCLS, addressed the Legal Terminology section of the CCLS exam. She discussed the various elements of the section that included legal terms, California citations, proper abbreviations and legal resources. Some great study tips were also provided. I found this workshop to be excellent for preparing for the CCLS exam or even as a refresher.

The Membership Luncheon followed and was attended by various associations throughout California. A discussion took place regarding how chapters are doing with filling positions. A few suggestions for filling vacant positions included having a phone committee to recruit



Maryanna Rickner, Elizabeth Bomke, CCLS, Launa Atkinson, CCLS and Michelle Chavez, CCLS after the Membership Luncheon

LSI First Quarterly Conference

(cont.)

by *Maryanna Rickner*

members for the open positions, and having co-chairs share the responsibilities of the positions. A subsequent discussion addressed ideas for increasing membership. There were suggestions of putting on membership drives with local businesses, and that “vendors” be called “business partners.” A brief update on the LSI official name and logo was also provided. A handout was circulated that contained the top four proposed logos that are currently under consideration.

That afternoon I attended the Civil Litigation Section seminar “e-Discovery.” The speaker, Kenneth P. Strongman, Esq., Mediator addressed what e-Discovery is along with the handling issues and types of e-Discovery. A key point was to be cognizant of the vast range of e-Discovery currently available (e.g., GPS systems, smart homes, personal cameras).

The evening banquet provided a delicious dinner menu and was a great deal of fun. The speaker, Chesley D. Quaide, Atkinson, Andel-

son, Loya, Ruud & Romo, humorously highlighted the importance of legal support staff. Entertainment was also provided by three talented singers from California High School, who sang solos of various country music songs. The performances of “9 to 5” and “Proud To Be An American” had us on the edge of our seats.

The brunch on August 19, 2012, was scrumptious. The vendor prizes were auctioned off and a beautiful commemorative gift was given to LSI President, Sandra T. Jimenez, CCLS. It was a good time to visit with other association members, close the festivities, and bid farewell.

Overall, I truly enjoyed the time I spent at this conference. Thank you, SLSA, for this opportunity! I am looking forward to attending another conference in the near future. Hopefully I will see you there.



Melanie Herman, Lynne Koroush, Dawn Forgeur, CCLS, Tammy Hunt, CCLS, Maryanna Rickner, and Astrid Watterson, CCLS



Lynne Koroush
and
Maryanna Rickner



Lynne Koroush,
Maryanna Rickner
and
Elizabeth Bomke, CCLS



Maryanna Rickner

*Dawn Forgeur, CCLS
and
Launa Atkinson, CCLS*



*Maryanna Rickner
and
Melanie Herman*

*Tammy Hunt, CCLS,
Lynne Koroush,
Astrid Watterson, CCLS,
and
Dawn Forgeur, CCLS*





Sandra Jimenez, CCLS and Dawn Forgeur, CCLS



Tammy Hunt, CCLS, Maryanna Rickner, Dawn Forgeur, CCLS, Lynne Koroush, and Melanie Herman

CCLS Terminology List
by Launa Atkinson, CCLS

A priori	from cause to effect
Certiorari	to be informed of; make certain regarding
Indicia	marks; signs
In rem	against the thing
Nota bene (N.B.)	note well
Sua sponte	on one's own initiative
Carpe diem	seize the day
Ipsso facto	by the fact itself
Corpus delicti	body of the offense; essence of the crime
Ergo	therefore

CCLS Quiz Answers

CCLS QUIZ ANSWERS (from page 10):

ANSWERS—Select the best word

1. C
2. A
3. B
4. B
5. A

ANSWERS—[T]rue or [F]alse

1. True
2. False
3. True
4. True
5. False





Desert Palm Legal Professionals Association Invites you to join us for A Weekend in Paris

November 16 -18, 2012
LSI 2nd Quarterly Conference
Palm Springs, CA

Conference Registration Form

Name (as it will appear on badge): _____
Mailing Address: _____
City/State/Zip: _____
Home Telephone: _____
Work Telephone: _____
E-mail Address: _____
Local Association (please spell out): _____ LSA/LPA

Please check if applicable and include title:

- State Officer _____
- State Chairman _____

Please check if you are:

- Governor CCLS PLS

SCRIP (includes Registration, Reception, Banquet and Brunch)
POSTMARKED BEFORE OCTOBER 15, 2012 \$114 \$ _____
POSTMARKED OCTOBER 16, 2012 OR LATER \$124 \$ _____

INDIVIDUAL TICKETS			
Registration by October 15, 2012	_____@	\$15.00	\$ _____
Registration after October 15, 2012	_____@	\$25.00	\$ _____
Welcome Reception (Friday)	_____@	\$20.00	\$ _____
Governor's Luncheon (Saturday)	_____@	\$23.00	\$ _____
President's Luncheon (Saturday)	_____@	\$23.00	\$ _____
Membership Luncheon (Saturday)	_____@	\$23.00	\$ _____
Banquet (Saturday Evening)	_____@	\$60.00	\$ _____
Brunch (Sunday)	_____@	\$22.00	\$ _____

TOTAL AMOUNT ENCLOSED \$ _____

Please indicate choice of: Sole Veronique Chicken Breast Dijonaise
 Beef Bourguignon Vegetarian

Special Dietary Restrictions: _____
Please make checks payable to: DPLPA Conference Fund

Mail to: Donna Ellis, Registration Chairman c/o Brian M. Lewis Law Office
44700 Village Court, Suite 100, Palm Desert, CA 92260

For Information, contact Conference Chair:
Jennifer Ellis (808) 542-4376 jennellis21@yahoo.com

NO REFUNDS UNTIL AFTER CONFERENCE



Conference

Desert Palm Legal Professionals Association Invites you to join us for A Weekend in Paris

November 16 -18, 2012
LSI 2nd Quarterly

Palm Springs, CA

HOTEL RESERVATIONS

Hilton Palm Springs
400 East Tahquitz Canyon Way
Palm Springs, CA 92262



ROOM RATES:

\$109 per night plus \$8 per day Resort Fee
Deadline for Group Rate is November 1, 2012

ROOM RESERVATIONS:

Call Hilton Reservations at (800) 445-8667 or call Hilton Palm Springs directly at (760) 320-6868
Online at www.hilton.com
Group Code: **LSI**

CHECK IN/OUT: PARKING:

Check in: 3:00pm Self Parking included in resort fee
Check out: 12:00pm Valet Parking is \$12 per day

AIRPORTS:

Palm Springs International Airport is 1.5 miles from Hilton Palm Springs
Ontario Airport is 65 miles from Hilton Palm Springs

SHUTTLE SERVICE:

Complimentary round-trip shuttle service to/from Palm Springs International Airport
Contact Hotel at (760) 320-6868

FOR MORE INFORMATION:

Contact Jennifer Ellis at jennellis21@yahoo.com or (808) 542-4376



Lynne Koroush

August Regular Meeting Vendor Spotlight: Atkinson-Baker

by Lynne Koroush

Atkinson-Baker is a national court reporting firm with a staff of over 160 and a court reporter base that exceeds 1,000. They have offices throughout the United States, and a worldwide network to meet the needs of their clients, even with last-minute notice. Here in Sacramento, Atkinson-Baker has a pool of over 60 court reporters ready to assist your office with any court reporting needs.

To date, Atkinson-Baker has completed over a half-million depositions, and has been cited by *Inc.* magazine as one of the 500 fastest-growing companies in the United States. They have also been recognized six times in *Inc.* 5,000's annual ranking of the fastest-growing privately held companies in the United States.

From court reporting to conference rooms, from interpreters to videographers, from process serving to online document depositories, Atkinson-Baker can assist you.

Thank you very much to Wendy Lannoye and the folks at Atkinson-Baker for being at our August meeting and being SLSA's Vendor of the Month!

For more information on Atkinson-Baker, please contact:

Wendy Lannoye
Client Services Director
wlannoye@depo.com
P 800-288-3376 EXT 4101 F 800-925-5910

“ Please remember to support our vendors, because they support us!! ~Lynne Koroush ”



Wendy Lannoye and Lynne Koroush

August Regular Meeting Speaker Spotlight: June Coleman, Esq.

by Dawn Forgeur, CCLS

Sacramento LSA welcomed the President of the Sacramento County Bar Association, June Coleman, Esq., as its August dinner meeting speaker. Ms. Coleman spoke on "The Ins and Outs of Financial Literacy," which covered credit reporting, identity theft, and debt collection. This was a great presentation, with everyone receiving a better education on debt collection, what collectors can and cannot do, and how to protect and handle your own credit. Ms. Coleman was an engaging speaker with a great topic. We would gladly welcome her back and would definitely encourage our members to attend.

Credit Reporting

Ms. Coleman talked about where the sources of credit reporting come from and the various statutes that credit reporting agencies have to follow regarding the accuracy of the credit reports. To dispute information on a credit report, you must contact the credit reporting agency (Equifax, TransUnion, Experian) and not the credit furnisher.

Identify Theft

If a debtor's identity is stolen and a debt was established that is not theirs, a creditor/debt collector should receive the documents listed below from the victim of the identity theft.

Police report

- Written statement – Identity Theft Affidavit
- Certification that the statement is true
- Copy of victim's driver's license/ID card
- Correspondence disputing any debt as a result of the theft
- Written proof of residency at the time of the debt
- If you have it, the ID of the true debtor
- Statement that the debt was unauthorized

A debtor must provide the notification of identity theft to the creditor/debtor in writing. Upon receipt of the documents, collection efforts must cease during the investigation. Col-

lection efforts can only recommence upon a good faith determination that the information provided does not establish that the debtor is not responsible. The creditor/collector must notify the debtor of their determination in writing.

Debt Collection

A debt collector must follow some rules when attempting to collect a debt. Generally, they are not to call a debtor before 8:00 a.m. and after 9:00 p.m. A collector cannot threaten violence or arrest, or use profanity and obscene language. A collector is allowed to call a debtor at work unless the employer says that the debtor is now allowed any personal calls at work. A collector also may contact another person to locate the debtor. A collector is allowed to call daily (even holidays and weekends), but not frequently enough to harass. Bottom line, if you are not answering a debt collector's call, they are going to keep trying to get a hold of you! If you really want them to stop calling, you must request this in writing.

June Coleman is a defense litigator with Kronick Moskowitz Tiedemann & Girard and her areas of emphasis include defense of consumer rights actions, including litigation involving the Fair Debt Collection Practices Act and the Fair Credit Reporting Act. She is an accomplished author and a well known presenter on matters regarding the Fair Debt Collection Practices Act and the Fair Credit Reporting Act. She earned her Juris Doctor degree with Great Distinction from the University of the Pacific, McGeorge School of Law in 1997. Ms. Coleman is also the current President of the Sacramento County Bar Association.



June Coleman
and
Crystal Rivera



June Coleman
and
Dawn Forgeur,
CCLS

Regular Dinner Meeting



Maimie Chyinski and Teri McClory, CCLS



Anne French and Rebecca Lerma



Dawn Forgeur, CCLS and Shelly Reyes



Nuriya Safarara and Lindsie Strand

August 2012

Sacramento Legal Secretaries Association

LUNCH LESSON

Registration begins at 11:45 a.m. and the speaker will begin promptly at noon!

Topic:

Citations Part 2: BLUE BOOK

Speaker: *Rebecca Anderson, Esq.*
Downey Brand LLP

Date: September 13, 2012
 Time: 12-1 p.m.
 Location: Downey Brand LLP
 621 Capitol Mall, 18th Floor
 Sacramento, CA 95814
 Cost: \$15 LSI Members
 \$17 Non-LSI Members
 NO REFUNDS
 Lunch will be provided. Public parking is available in the building for a fee.

Name: _____
 Firm: _____
 Mailing Address: _____
 Daytime Phone: _____
 Email: _____
 Are you an SLSA member? Yes No
 Are you a member of another LSI association:
 If yes, which association? _____
 Check Here If You Would Like Membership Information:
 Do you require an MCLE or CCLS certificate?

Make Checks Payable to: SLSA
 Reservation due by September 7, 2012
 To: Anne French
 Downey Brand LLP
 621 Capitol Mall, 18th Floor
 Sacramento, CA 95814
 Tel: 916-520-5268/Fax: 916-520-5668
 Email: afrench@downeybrand.com

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



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

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

CHANGES IN MEMBER INFORMATION (PLEASE PRINT LEGIBLY):

NAME: _____
 FORMER NAME: _____
 NEW EMPLOYER: _____
 BUSINESS ADDRESS: _____
 CITY: _____
 STATE & ZIP: _____
 BUSINESS PHONE: _____
 FAX: _____
 BUSINESS E-MAIL: _____ (for vital updates/reminders)
 NEW HOME ADDRESS: _____
 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: _____ |

CHANGES TO MAILING/LISTING INFORMATION:

Where do you want *The Legal Eagle* and other SLSA/LSI mail delivered?
 Where do you want e-mail delivered?
 Which address should be listed in the membership roster?
 If you do NOT want to be listed in the membership roster, check here:

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

Please submit to:

**Lynne Koroush
 SLSA Vice President and Membership Chair 2012-2013
 1201 K St., Ste. 1100
 Sacramento, CA 95814
 E-mail: vicepresident@slsa.org**



September

Vicki Haynes	Sept. 4	Lacy Monserrat	Sept. 25
Dawn Willis	Sept. 11	Shelly Reyes	Sept. 26
Tiffany McGill	Sept. 13	Nuriya Safarova	Sept. 26
Dawn Forgeur, CCLS	Sept. 17	Jennifer Sullivan	Sept. 27
Sherri Lee Caplette, CCLS	Sept. 20	Corene Rodder	Sept. 28
Sally Day	Sept. 23	Shawn Prentiss	Sept. 29
Lynne Koroush	Sept. 24	Ana Marie Sotuela	Sept. 29
Debra Yurgelevic	Sept. 24	Erin Sanchez	Sept. 30



Free 2012 Membership in the Law Practice Management & Technology Section

From now through September 14, we invite all members of the State Bar of California and all other California legal professionals to join the Law Practice Management & Technology Section (LPMT) **FREE** and enjoy the benefits of membership for the remainder of 2012. LPMT enhances the knowledge of its members – and the larger bar – in the areas of

- Law office systems and procedures
- Financial management
- Marketing legal services
- Technology
- Legal ethics



LPMT is the only section exclusively devoted to starting, growing, and maintaining a successful, well-grounded, and ethical law practice.

LPMT members – lawyers and non-lawyers alike – constantly search for ways to improve the practice of law through better use of technology and the *best practices* in managing firms of all sizes, to create an optimal working environment between lawyer and client as well as among all firm personnel, and to share their insights with others.

LPMT Executive Committee members have broad knowledge and experience in varied areas of law. They co-authored the essential handbook *The California Guide to Opening and Managing a Law Office* and were instrumental in its publication. Several are national experts on technology and on law practice management. With their diverse background and years of experience, they constitute a singular resource for attorneys across the spectrum, regardless of an attorney's particular discipline.

In addition to the above, member benefits include:

Free publications: LPMT's flagship publication, *The Bottom Line*, a bi-monthly journal focused on practice management and the use of technology. On alternate months, members receive the *LPMT E-News*, which includes the ever-popular *Tech Tips* feature.

Free MCLE: Each issue of *The Bottom Line* contains at least one MCLE article eligible for one hour of self-study credit – **FREE** to all members. Over a year, *The Bottom Line* offers at least 10 **FREE** MCLE hours, including those necessary special MCLE credits – now available online 24/7 and still **FREE** when you enter your special coupon LPMT code.

Discounts: Save money on numerous products, seminars, services, and technology trade shows, including offerings from CEB.

Website: LPMT's site includes a members-only area detailing section benefits and providing access to an archive of past issues of *The Bottom Line*. <http://lpmt.calbar.ca.gov>

To receive your FREE LPMT Section membership for 2012, just send your name and CSB # to LPMT at LPMT@calbar.ca.gov by September 14. If you seek Associate membership (non-Bar members), please send your complete contact information.



FOR SALE!

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

\$10 EACH





**PLACER COUNTY LEGAL PROFESSIONALS' ASSOCIATION
PRESENTS**

**fall LUNCHEON
AND
BUNCO**

SATURDAY, OCTOBER 20, 2012

12:00 – 4:00 P.M.

SALAD AND POTATO BAR

**DEWITT SENIOR CENTER
11576 D AVENUE
AUBURN, CA**

**\$20 PER PERSON ADVANCE PURCHASE
\$25.00 AT DOOR**

**FOR INFORMATION/TICKETS CALL:
VICKI YOUNG (530-269-3440)
or MARY AYALA (916) 207-0083**

**Checks can be made payable to: PCLPA
Mail to: Vicki Young, 9460 Upper Valley Road, Auburn CA 95602**



SUPERIOR COURT OF CALIFORNIA
COUNTY OF SACRAMENTO

WWW.SACCOURT.CA.GOV

PUBLIC NOTICE

**CHANGES TO THE PRESIDING JUDGE
CIVIL LAW & MOTION CALENDAR AND CIVIL EX PARTE MATTERS**

Effective September 04, 2012

The Presiding Judge Law and Motion Calendar:

Effective September 04, 2012, the Presiding Judge Civil Law and Motion calendar will no longer be heard in Department 47 at 9:00 a.m. It will be heard by the Honorable Robert C. Hight, the Supervising Civil Judge in Department 44, Tuesday through Friday at **9:30 a.m.**, except for the **second** Thursday of each month. Please continue to file appropriate paperwork at the civil front counter, drop box or by mail. **Matters scheduled for hearing in D-47 prior to September 04, 2012, will be heard in D-44. A tentative ruling will be issued advising all parties of the department change.**

Ex Parte Matters:

Effective September 4, 2012, the Presiding Judge Civil Ex Parte Matters will not be heard in Department 47. They will be heard in Department 44 by the Honorable Judge Robert C. Hight, the Supervising Civil Judge at **9:00 a.m.**, Tuesday through Friday except the **second** Thursday of each month. Ex-parte applications shall be presented by appointment only, with at least 24 hours notice to the opposing party or counsel. Appointments are made by calling 916-874-8243 between the hours of 8:30 a.m. – 12:00 p.m. and 1:00 p.m. - 4:30 p.m. Please continue to file appropriate paperwork at the civil front counter, drop box or by mail.

The remainder of the rules for filing ex-parte matters are still in effect.

California Certified Legal Secretary

A Program of
Legal Secretaries, Incorporated



APPLICATION

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

**CCLS Certifying Board
24740 Oro Valley Road
Auburn, CA 95602**

<input type="checkbox"/> Northern California	<input type="checkbox"/> Saturday, October 20, 2012
<input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, March 16, 2013

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

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

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

* Fees subject to change without notice.

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

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

Name _____ Last 4 Digits of SSN _____

Mailing Address: _____

City/State/Zip: _____

Day Phone: _____ Evening Phone: _____

E-mail(s): _____

Highest level of formal education completed: _____; Highest Degree: _____.

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

Dates _____ Position _____

Employer _____

Address _____

City/State/Zip _____

Supervisor _____ Phone _____

Summary of Duties _____

Dates _____ Position _____

Employer _____

Address _____

City/State/Zip _____

Supervisor _____ Phone _____

Summary of Duties _____

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

Signature of Applicant _____ Date _____

BENEFITS**LEGAL SECRETARIES INCORPORATED (LSI)**

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

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

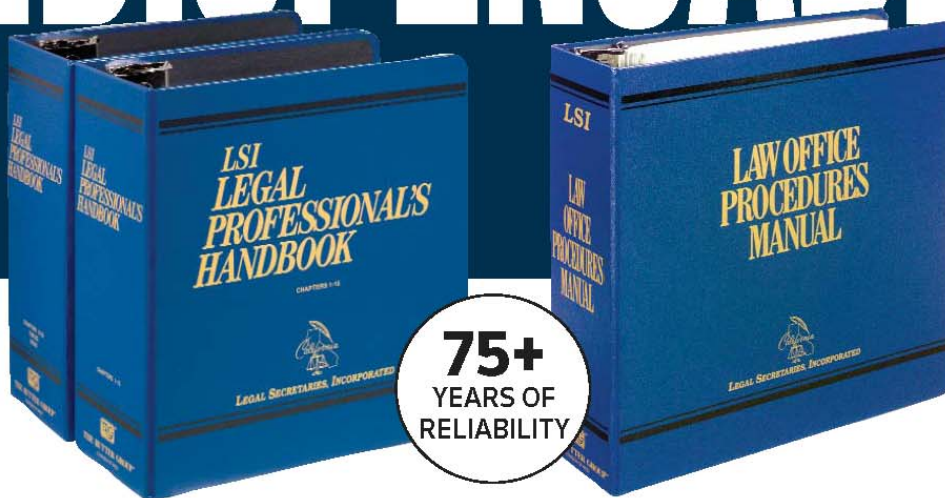
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LSI Marketing Committee Coordinator
939 Hough Avenue, #22, Lafayette, CA 94549
Cell - (415) 717-5675
marybeau@comcast.net

**LEGAL SECRETARIES, INCORPORATED
MEMBERSHIP LIST AS OF 07/31/12**

Total Members (Fiscal Year-end 4/30/12)	Association		New Members	Transfer Members	Continuing Members	Total Members
37	Alameda County	LSA	7		33	40
10	Antelope Valley	LSA				0
44	Beverly Hills/Century City	LSA	6		37	43
19	Butte County	LPA			12	12
17	Capitol City	LPA	1		7	8
7	Conejo Valley	LPA	5		6	11
21	Desert Palm	LPA	5		19	24
21	El Dorado County	LPA			11	11
45	Fresno County	LPA	15		25	40
40	Humboldt County	LPA	3		30	33
40	Imperial County	LPA	4		19	23
27	Livermore-Amador Valley	LPA	4		23	27
72	Long Beach	LSA	7		51	58
43	Los Angeles	LSA	6		36	42
17	Marin County	LPA	5		15	20
44	Merced County	LPA			39	39
5	Monterey County	LSA				0
73	Mt. Diablo	LPA	5		52	57
13	Napa County	LSA			12	12
94	Orange County	LSA	11		51	62
14	Palo Alto	LSA				0
20	Placer County	LPA	1		16	17
9	Redding	LPA			4	4
21	Rio Hondo District	LPA	3		13	16
21	Riverside	LPA	2		18	20
164	Sacramento	LSA	44		91	135
211	San Diego	LSA	37		148	185
65	San Fernando Valley	LSA	11		39	50
46	San Francisco	LPA	7		25	32
33	San Gabriel Valley	LSA	11		22	33
68	San Mateo County	LSA	9		46	55
26	Santa Barbara	LSA	3		20	23
81	Santa Clara County	LSA	23		50	73
7	Santa Cruz County	LPA	1		7	8
12	Santa Maria	LPA	1		8	9
35	Sonoma County	LSA	9		31	40
12	Southern Butte	LSA			11	11
41	Stanislaus County	LPA			32	32
48	Stockton-San Joaquin	LPA			33	33
4	Trinity County	LSA			4	4
23	Ventura County	LPA	7		16	23
28	Members at Large					26
1678	YTD TOTALS					1391

Membership list as of 07/31/12

INDISPENSABLE



LEGAL PROFESSIONAL'S HANDBOOK

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LSI Members-Only Price.....\$236
Nonmembers Price\$295

Price includes shipping. Add applicable sales tax.

LAW OFFICE PROCEDURES MANUAL

...THE IDEAL TRAINING MANUAL FOR NEW STAFF!

This Manual contains detailed practice forms for every major area of law practice, along with step-by-step instructions for completing them. Compiled by Legal Secretaries Incorporated, this is a "must-have" forms guide for legal secretaries, paralegals and new lawyers; and it's a great resource for training your office staff. In fact, the Manual is frequently used in schools, workshops and legal secretarial classes. You'll also find handy miscellaneous aids, such as procedural checklists and guidelines, tips on transcription and proofreading, law office abbreviations and legal terminology, and a list of useful reference books.

LSI Members-Only Price.....\$140
Nonmembers Price\$175

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Buy both LSI books together and get a discount!
Combo price for both books.....\$329
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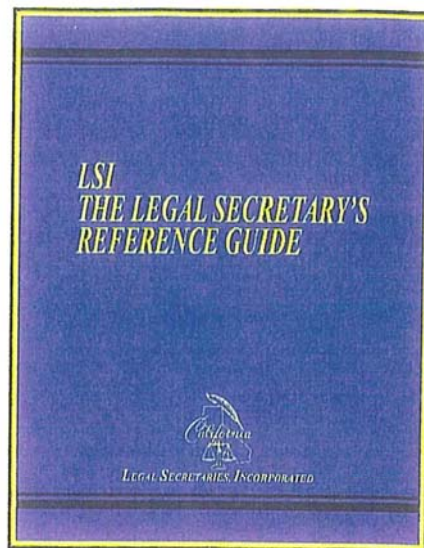
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No legal professional should be without one!



The guide includes:

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- Legal terminology
- Legal research tips/proper usage of citations
- Timetables in civil litigation, discovery, and statutes
- Flowcharts in civil litigation, discovery, criminal, family law, conservatorships, probate, adoptions, corporations, unlawful detainer, and workers compensation

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 Fax: (707) 725-1344 www.lsi.org



SLSA COMMITTEE CHAIRMEN

2012-2013

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by Liz Gideon, CCLS

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