



THE ADVANCE SHEET

SCCoLPA's News & Events

July 2017

Dear SCCoLPA Members:

Greetings! The summer is upon us and that means everyone is busy with vacations and enjoying time with family and friends - I hope you have all been able to relax and enjoy the beautiful weather this month - we're all very lucky to live in this part of the country. Sunglasses and sunscreen are all you need these days!

I also hope that you can make it to one of SCCoLPA's upcoming events - we have some great monthly membership meetings coming up, as well as our very first Bunco night this month. And in August we're once again heading to the ballpark to enjoy a San Jose Giants game, and then wrap up the month with a fantastic educational workshop. Check out all the details in this issue of The Advance Sheet!

In this issue, we have a lot of information to share, along with some important dates for your calendar:

- * **July 11, 2017:** Thinking of looking for a new job? Or just starting out in the legal field? If you need help putting together a great cover letter and a professional resume, join us at our July monthly meeting, where our guest speaker, Elisabetta Fabiani, manager at Robert Half Legal, will give you some important pointers and suggestions to help you get ready for that all-important interview!
- * **July 20, 2017:** SCCoLPA's first annual Bunco Night! Come one, come all, and join in on a fun, easy-to-play dice game, to be held at McManis Faulkner in San Jose. Appetizers and "mocktails" will be served. Prizes will be awarded to winners *and* losers!
- * **August 5, 2017:** Come out to the ballgame for some great BBQ and fun! Once again this summer, SCCoLPA will be at Municipal Stadium as the San Jose Giants take on the Inland Empire 66ers. Game time is at 6:00 p.m. - stick around and after the game enjoy the fireworks show!

* **August 8, 2017:** You got the job - hurray! Join us at our August membership meeting as Attorney Serena Miller will discuss how to polish your professional image in the workplace, the ins and outs of proper business etiquette, and how your communication style affects your relationship with co-workers in the office.

* **August 24, 2017:** As summer comes to a close, SCCoLPA is extremely pleased to present one of its best workshops ever! We are fortunate to have four experts in the field of e-discovery present "E-Discovery: Navigating & Managing E-Discovery in the Law Office." This is a workshop that many members have requested, and our panel will help you take the stress out of building better e-discovery practices in your law firm. Registration will open shortly. Invite your entire office to this workshop - it's geared for everyone, including legal assistants, legal secretaries, paralegals, and attorneys.

Additional information on all these events can be found in this newsletter.

Calling all volunteers! As you all know, SCCoLPA has the honor of hosting LSI's 2nd Quarterly Conference in November 2018. The conference will be held at the Silver Legacy Resort in Reno, NV the weekend of November 9-11, 2018 and we're so excited to start planning! That being said, we have formed a Conference Committee to get the ball rolling, and we need YOUR help! If you are interested in volunteering on the Conference Committee, step on up! Please contact me at endresser@gmail.com for more information.

Membership in SCCoLPA continues to grow every year, and 2017-2018 will be no exception. SCCoLPA is currently the third largest association in the state, and we hope to keep attracting new members from the local legal community, be they students, legal secretaries, legal assistants, paralegals, attorneys, and legal support professionals. We need your help, so encourage your co-workers, peers, friends, bosses, and vendors to join our association!

Enjoy your summer!

With very best wishes,

Elise Dresser, CCLS
President



UPCOMING MONTHLY MEETINGS

Monthly Membership Meeting July 11, 2017

Are you currently looking for a job in the legal field? Do you need a helping hand polishing up your resume? If you need tips on how to freshen up your resume, create a perfect cover letter, and how to present yourself at an interview, join us at our July 11, 2017 membership meeting. We are pleased to present Elisabetta Fabiani, Esq., Manager at Robert Half Legal in Palo Alto as our guest speaker for July. Bring your resume to the meeting and Ms. Fabiani will assist you to make it perfect before you send it to prospective employers!

Register and pay via PayPal at www.sccolpa.org, or RSVP via email at reservations.sccolpa@gmail.com. Cash or checks accepted at the door.

No refunds will be issued if your reservation is canceled within 24 hours of the event. A \$3 convenience fee will be added for PayPal/credit card



Santa Clara County Legal Professionals Association
July 2017 Dinner Meeting



"Getting a Job - From Resume to Interview"
Guest Speaker:
Elisabetta Fabiani, Esq.

Are you currently looking for a job in the legal field? Do you need tips on how to polish up your resume, create a perfect cover letter, and how to present yourself at an interview? Join us as Elisabetta Fabiani, Manager at Robert Half Legal-Palo Alto, will help get you started. Bring your resume to the meeting, and Elisabetta will assist you in making it perfect!

Register and pay via PayPal on our "Upcoming Events" page at www.sccolpa.org, or RSVP via email at reservations.sccolpa@gmail.com. NOTE: Please put "SCCOPA Reservation" in the title of your email. Make checks payable to "SCCOPA." Cash or checks accepted at the door.

No refunds if reservation is canceled within 24 hours of the event. \$3 convenience fee added for PayPal/credit card payment.

This activity has been approved for substance continuing legal education credit by the State Bar of California to the amount of 0.5 hours, of which 0.5 hours will apply to legal ethics, law practice management, professionalism, discipline, and treatment of substance abuse, and substance abuse, or alternative of law. SCCOPA certifies that this activity conforms to the standards for approved substance abuse activities prescribed by the rules and regulations of the State Bar of California governing substance continuing legal education. 0.53 credit will be offered to the amount of 0.5 hours.

Tuesday, July 11, 2017

TIME
Social Hour: 6:00 p.m.
Dinner/Program: 6:30 p.m.

Place: Eatery & Bar
68 S. Fourth Street, San Jose, CA 95113
408-971-1960 • valet parking at the 4th Street parking garage

COST
\$35.00 (dinner, dessert & CCLIS credit)
\$30.00 CCLIS credit; no dinner
Free (no dinner or CCLIS credit)

UPCOMING EVENTS

June 17, 2017 7th Annual Marilyn Oki BBQ - FREE TO ALL SCCOPA MEMBERS!
July 11, 2017 Dinner Meeting - "Getting a Job - From Resume to Interview"
August 5, 2017 San Jose Glows - "St. George's Island English Glows"

payments.

Monthly Membership Meeting August 8, 2017

Your professional image is one of your most valuable personal resources. And as a legal professional, you want to succeed in today's world by developing and refining your professional presence. Join us on August 8, 2017 as Serena Miller, Esq. will help you learn how to recognize the accepted rules of business etiquette and how your communication style affects your image and credibility, the ins and outs of dressing appropriately, and how to deal effectively with difficult people and difficult situations.

Register and pay via PayPal at www.sccolpa.org, or RSVP via email at reservations.sccolpa@gmail.com. Cash or checks accepted at the door.

No refunds will be issued if your reservation is canceled within 24 hours of the event. A \$3 convenience fee will be added for PayPal/credit card payments.

Santa Clara County Legal Professionals Association
August 2017 Dinner Meeting

Professional Presence Defined

Professional Presence in Law Firms: How to Make Your Image Shine!

Guest Speaker: Serena Miller, Esq.
Millennium Solutions Group/Coach & Mentor

Your professional image is one of your most valuable personal resources. And as a legal professional, you want to succeed in today's world by developing and refining your professional presence. This program will help you learn how to recognize the accepted rules of business etiquette and how your communication style affects your image and credibility, the ins and outs of dressing appropriately, and how to deal effectively with difficult people and difficult situations. Join us as our guest speaker, Serena Miller, Esq., will guide you through these issues and help you gain self and confidence in how you present yourself in a professional setting.

Tuesday, August 8, 2017

TIME
Social Hour: 6:00 p.m.
Dinner/Program: 6:30 p.m.

Flames Eatery & Bar
68 S. Fourth Street, San Jose, CA 95113
(408) 971-1960 • valet parking at the 4th Street parking garage.

COST
\$30.00 (dinner, dessert & CCLC credit)
\$20.00 (CCLC credit; no dinner)
Free (no dinner or CCLC credit)

UPCOMING EVENTS

June 27, 2017 7th Annual Meeting ON B2C - FREE TO ALL SCCOLPA MEMBERS
July 11, 2017 Dinner Meeting - "Getting a Job - From Resume to Interview"
August 5, 2017 San Jose Clients - "Hi Clients & Inland Empire Blues"

Monthly Membership Meeting September 12, 2017

Electronic court filing for civil matters will soon be mandatory in Santa Clara County. What do you need to know to be prepared? Who can you rely on to get your documents filed? Join us as Lili Daniel from One Legal will provide you with the latest updates from the court, and get you ready with

Santa Clara County Legal Professionals Association
September 2017 Dinner Meeting

"E-Filing in Santa Clara County Superior Court"

Guest Speaker: Lilibeth Daniel
Customer Success Supervisor
One Legal

Electronic court filing for civil matters will soon be mandatory in Santa Clara County. What do you need to know to be prepared? Who can you rely on to get your documents filed? Join us as Lili Daniel from One Legal will provide you with the latest updates from the court, and get you prepared with everything you need to know in order to prepare your law firm for e-filing.

Tuesday, September 12, 2017

TIME
Social Hour: 6:00 p.m.
Dinner/Program: 6:30 p.m.

Flames Eatery & Bar
68 S. Fourth Street, San Jose, CA 95113
(408) 971-1960 • valet parking at the 4th Street parking garage.

COST
\$30.00 (dinner, dessert & CCLC credit)
\$20.00 (CCLC credit; no dinner)
Free (no dinner or CCLC credit)

UPCOMING EVENTS

July 11, 2017 July Monthly Membership Meeting - "Getting a Job - From Resume to Interview"
July 20, 2017 SCCOLPA's 1st Annual Business Night
August 5, 2017 San Jose Clients & Inland Empire Blues

everything you need to know in order to prepare your law firm for e-filing.

Register and pay via PayPal at www.sccolpa.org, or RSVP via email at reservations.sccolpa@gmail.com. Cash or checks accepted at the door.

No refunds will be issued if your reservation is canceled within 24 hours of the event. A \$3 convenience fee will be added for PayPal/credit card payments.



June 2017 Highlights



June Monthly Membership Meeting June 13, 2017

Santa Clara County Legal Professionals Association held its June membership meeting on June 13, 2017 at Flames Eatery & Bar in downtown San Jose, and was pleased to have Todd B. Rothbard, Esq., present "Unlawful Detainer Laws - What Everyone Needs to Know." Mr. Rothbard explained the process of preparing and serving pre-eviction

notices, three-day notices, and the differences between commercial and residential actions. He also explained how and when such notices should be served. SCCoLPA also honored Ana Cervantes as its Member in the Spotlight for June. Congratulations Ana! We are honored and proud to have you as a member of our association.



Guest Speaker Todd B. Rothbard, Esq. and Programs Chair Irma MacKay



Our very own "Pink Ladies" Vivian Shreve, CCLS; April Ignaitis, CCLS; and Linda Neuman. These ladies had a great time at LSI's Annual Conference!



Welcome to one of SCCoLPA's newest members, Brian Ward, along with Governor Linda Neuman and Pam Stallings, CCLS



Congratulations to SCCoLPA's Member in the Spotlight for June, Ana Cervantes! Vice President of Membership Shannon Quigley, presented Ana with her Certificate of Recognition at the June membership meeting.

SCCoLPA's 7th ANNUAL BBQ &

MEMBERSHIP APPRECIATION DAY

Saturday, June 17, 2017

SCCoLPA's 7th Annual Marilyn Ott Memorial BBQ & Membership Appreciation Day was hosted at Rod & Tina Cardinale's house on June 17, 2017. What a great turnout it was despite the stifling heat. We were ready! The tri-tip was bought, trimmed and marinated, and the water and soda was on ice. The corn was cooking on the stove under the watchful eye of Norbert! We had the tables, chairs, decorations and pop-up sunshades in place and the silent auction was set up. The committee members and guests started to arrive with the side dishes and desserts, and soon the grill would be fired up! We were set to thank each member in attendance their support and dedication to this amazing association.

We initiated and welcomed three new members (Carol Karwatt, Brian Ward and Timothy Willette). When the Dessert Contest began, we called upon Brent Fairbanks and his wife, Christy Rohrig, along with Janet Brewer, to be our impartial judges who took their jobs very seriously as you can see by the picture! In the end, it was decided that the clear winner was Sheryl Boardman with her Key Lime Cheesecake Bars and she was presented with a \$25.00 gift card, a red kitchen towel and oven mitt for a job very well done. We also had a drawing for a Kindle Fire and that went to April Ignaitis, CCLS! A great big thank you to all who donated the items for our Silent Auction. Our fundraising efforts resulted in over \$500.00.

As you can see from the pictures, despite the heat, we all had a great time and hope to see an even bigger turnout next year! A final note to everyone who participated in the setup/break down and clean up: you all worked very hard and deserve a great big Thank You! Most of all, thank you to all the members who continue their support, we cannot do it without you!

Shannon Quigley
Vice President of Membership



Thanks to all our members and friends who came to the BBQ!



BBQ Chair Rod Cardinale, Jr. keeping a close eye on that delicious tri-tip!



VP of Membership and BBQ Co-Chair Shannon Quigley initiating SCCoLPA's newest members Carol Karwatt, Tim Willette, and Brian Ward. Welcome!



M'Liss Bounds, April Ignaitis, and Michaela welcomed our guests with great big smiles!



April Ignaitis, CCLS and Linda Neuman (and Norbert) relaxing before the BBQ



Thank goodness for those shade tents - it was a HOT day!



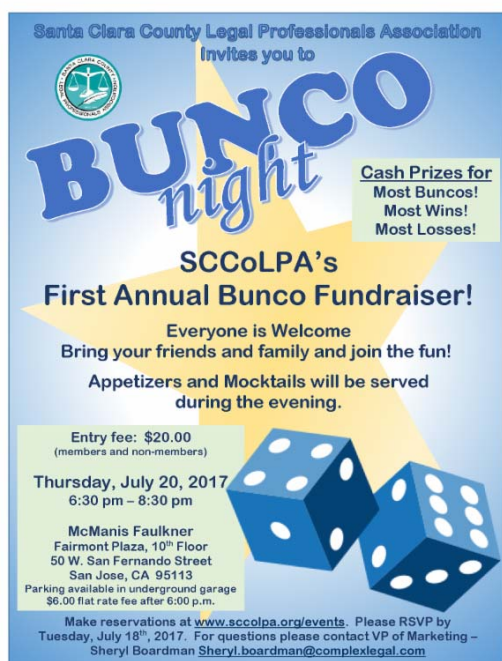
The dessert contest judges (Janet Brewer, Christy Rohrig, and Brent Fairbanks) taking their job very seriously!.



The winning dessert contest entry - key lime cheesecake bites! The judges were blown away by these delicious treats. Congratulations to Sheryl Boardman, the winner of this year's dessert contest!

UPCOMING EVENTS

Join Us For Our First Bunco Fundraiser! July 20, 2017



Have you ever played Bunco? Ever wondered what Bunco is? It's an easy, fun, social dice game played with three dice in groups of four consisting of two teams. There are six rounds, progressing in order from one to six, where the number of the round serves as the target for that round's rolls. Within a round, players alternate turns rolling three dice, aiming to obtain the target number. Players gain one point for each die matching the target. If the player gets three-of-a-kind of the target number (a Bunco), they get 21 points. The round stops when a player at a head table obtains 21 points. After each round the winning team moves to the next table and change partners. Following three games (18 total rounds), cash prizes will be awarded to the person with the most Bunco's, the

most Wins, and the most Loses.

Please join us on **Thursday, July 20, 2017** for our first Bunco fundraiser. It will be held at McManis Faulkner, 50 West San Fernando St., 10th Floor, San Jose starting at 6:30 p.m. There will be cash prizes, appetizers, mocktails, and door prizes, all for \$20.00!

Please come and join the fun. Everyone is welcome, members and non-members included. You do not need to be a member of our association or affiliated with the legal community. A flyer will be circulated shortly with registration information. If you have any questions please feel free to contact Sheryl Boardman at Sheryl.boardman@compexlegal.com.

SCCoLPA's Annual Summer Baseball Game
August 5, 2017
San Jose Giants v. Inland Empire 66ers

Join us for a great day of fun in the sun!



Santa Clara County Legal Professionals Association
invites you to

The San Jose Giants v. Inland Empire 66ers
Municipal Stadium, 588 East Alma Ave. San Jose, CA 95112



Saturday, August 5, 2017
Game Time: 6:00 p.m.
Tickets: \$50 Adults / \$30 Children

Be part of the action as we watch the San Jose Giants from the private field level VIP Party Deck! Your ticket package includes one game ticket, a delicious BBQ meal, and two alcoholic beverages per guest as well as a personal Beverage and Food Attendant. You will have the opportunity to win Lucky Prizes throughout the game with your very own scorecard and bingo card! Learn about the history of the team with one of the handful of programs included.

Make reservations and payment at
www.sccolpa.org
or contact Reservations Chair M'Liss Bounds,
reservations.sccolpa@gmail.com
Please contact Rod Cardinale, Jr. at
rodcardinalejr@sbcglobal.net if you have any
questions about the game/ticket purchase.

Please RSVP by July 27, 2017

UPCOMING EDUCATIONAL WORKSHOP

E-DISCOVERY

Navigating & Managing E-Discovery in the Law Office

August 24, 2017

Have you ever thought: *"We should have done something about e-discovery and data management a long time ago. Now we just don't know where to begin!"*

Join our panel of experts who will help you take the stress out of building better e-discovery practices.

- The process of e-discovery from pre-lawsuit to trial
- What types of e-discovery software are available and what is best for your firm?
- How to cost and budget for e-discovery
- How to avoid liability, sanctions, and malpractice
- What is a litigation hold letter?
- How to draft responses to e-discovery requests
- Special consideration for texts, social media posts, and foreign language data
- How to effectively use data obtained at depositions, mediations, and trials

**Santa Clara County Legal Professionals Association
Presents**

E-DISCOVERY

Navigating & Managing E-Discovery in the Law Office



John Del Piero Vice President Discovia	Derek Duarte President BlackStone Discovery	Neda Shakoori, Esq. Senior Associate McManis Faulkner	Larry Wilson E-Discovery Manager Wilson Sonsini
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Have you ever thought "We should have done something about e-discovery and data management a long time ago. Now we just don't know where to begin!"

Join our panel of experts who will help you take the stress out of building better e-discovery practices.

- The process of e-discovery from pre-lawsuit to trial
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- How to draft responses to e-discovery requests
- Special consideration for texts, social media posts, and foreign language data
- How to effectively use data obtained at depositions, mediations, and trials

Thursday, August 24, 2017

Schedule: 5:30 p.m. – Registration 6:00 p.m. – Dinner 6:30 p.m. – 8:00 p.m. – Presentation	Location: Wilson Sonsini Goodrich & Rosati 650 Page Mill Road Palo Alto, CA 94304 Conference Room – Courtyard 1D (check in at reception desk)
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Workshop Fees: \$55 – Members (includes dinner/no refunds)
\$75 – Non-Members (includes dinner and free one-year membership in SCCoLPA/no refunds)
This workshop has been approved for 90 minutes of CLE/CCLS credit

Register online and pay via PayPal at www.sccolpa.org OR contact reservations.sccolpa@gmail.com

SCCoLPA, a local association of Legal Secretaries, is incorporated, an approved provider, certifies that this activity has been approved for minimum continuing education credit by the State Bar of California in the amount of 1.5 hours, of which zero (0) hour will apply to the practice management/prevention, detection, and treatment of substance abuse and emotional distress/minimization of bias credit (as appropriate to the content of the activity).

Join us on **August 24, 2017** for this informative workshop! Registration begins at 5:30 p.m. at Wilson Sonsini Goodrich & Rosati, 650 Page Mill Road, Palo Alto. Dinner will be served at 6:00 p.m. with the workshop to follow from 6:30 p.m. to 8:00 p.m. MCLE/CCLS credit in the amount of 1.5 hours will be offered.

Workshop Fees: \$55 for SCCoLPA/LSI Members (includes dinner/no refunds); \$75 for non-members (includes dinner and free one-year membership in SCCoLPA/no refunds).

Register and pay online at www.sccolpa.org.

GOVERNOR'S CORNER

~ by *Linda Neuman, SCCoLPA Governor* ~

In last month's issue of *The Advance Sheet*, our very own Governor, Linda Neuman, told you all about the fun activities and educational workshops that occurred at LSI's 83rd Annual Conference in Stockton, CA. Your SCCoLPA delegates and representatives definitely made their mark at this conference - if you haven't had a chance to read Linda's first half of her conference report, please do so!

Linda's second part of her report follows here - enjoy!

GOVERNOR'S REPORT - PART TWO

LSI's 83rd ANNUAL CONFERENCE

May 18-21, 2017 - MODESTO, CALIFORNIA

FIRST GENERAL ASSEMBLY OF DELEGATES

The 83rd General Assembly of Delegates was called to order on Saturday morning, May 20, 2017, at 9:31 a.m. by LSI President Jennifer L. Page, CCLS, Marin County LPA. The Presentation of the Colors were enacted by the gentlemen of the American Legion Post 74 and the Pledge of Allegiance was led by Brenda Bracy, CCLS President of Sacramento LSA. The Code of Ethics was read by Carre Boniface, President of Santa Maria LPA. The inspirational message was delivered by Christie Ensley, President of Placer County LPA. Her message focused on Tom Sayer Island in Disneyland Park and making the journey by ship (something new), to cross the water (change your attitude) to arrive on the island. Once there, looking back at the park with new dreams and hopes for the future. Kathy Martinez, CCLS President of Rio Hondo District LPA delivered the memorial address and Diane Mecca, Conference Chair introduced the Welcome Speaker, the Honorable Valli K. Israels, Stanislaus County Superior Court Judge. Judge Israels welcomed all in attendance, and gave us a little history on Cruisin' in Modesto and some interesting facts about George Lucas.

LSI Past President Christa Davis (2008-2010) did a wonderful job introducing the LSI Executive Committee to the delegation. For each Officer she recited fun facts letting us know where they were after their senior year in high school.

President Jennifer introduced the LSI Past Presidents in attendance: Diana E. Estabrook, PLS (1984-1986), Patricia E. Miller, PLS, CCLS (1998-2000), Mary S. Rocca, CCLS (2004-2006), Lorraine Bettencourt, PLS, CCLS (2006-2008), Christa Davis (2008-2010), Brooke A. Mansfield (2010-2012) and Mary J. Beaudrow, CCLS (2014-2016). Honorary Member Don Lee was also introduced.

Following the opening ceremonies, the first session of the general assembly commenced at 10:12 a.m. There were 78 registered Delegates, 72 Delegates present and 6 Delegates were absent. The Acting Official Registrar of Delegates, **(Our Very Own)** Linda Neuman, declared a quorum.

LSI Parliamentarian Kristi L. Edwards, CCLS moved to adopt the 2017 Annual Conference Standing Rules and adoption of the 2017 Annual Conference Election Rules. Both motions were carried and adopted.

Diane Mecca, 2017 Annual Conference Chair, Stanislaus County LPA, moved to adopt the 2017 Official Program. The motion was carried and adopted. The 2016 Annual Conference minutes were approved as submitted and the Committee to approve the 2017 Annual Conference Minutes was announced: Anna M. Brownson, CCLS, Riverside County LPA, Debby Tankersley, CCLS, Long Beach LPA and Carol Romo, San Francisco, LPA

Report of Nominations and Elections Chair: Mary J. Beaudrow, CCLS, Past President (2014-2016)

Executive Advisor and LSI Past President Mary J. Beaudrow, CCLS, read the list of nominations for the LSI Executive Committee. The following Officers were elected by acclamation:

President:	Jennifer L. Page, CCLS, Marin County LPA
Vice President:	Heather Edwards, San Fernando County LSA
Executive Secretary:	Lynne Prescott, CCLS, Sacramento LSA
Treasurer:	Rod Cardinale, Jr., Santa Clara County LPA

REPORTS OF ELECTED OFFICERS

President Jennifer L. Page, CCLS

President Jennifer expressed her thanks to the membership for a good year. She praised the LSS Section leaders and the CEC for all the wonderful education workshops presented this past year. President Jennifer also encouraged local associations to reach out to neighboring associations to jointly host events or educational workshops.

Vice President, Membership & Marketing Committee Coordinator and Programs Heather Edwards

Heather reported that LSI ended the fiscal year with 1,435 members which includes 30 Members-at-Large. She reminded the membership that LSI dues are due and per capita needs to be submitted to LSI by June 1st.

Heather announced the winners of this year's Membership Gain Contest:

Group A (0-15 members):	Southern Butte LPA (22% increase)
Group B (16-30 members):	Contra Costa County LPA (130% increase)
Group C (31-45 members):	Alameda County LSA (32% increase)
Group D (46-65 members):	San Fernando Valley LSA (72% increase)
Group E (66-150 members):	Fresno County LPA (94% increase)
Group F (over 150 members):	Sacramento LSA (41%)

Treasurer (Our Very Own) Rod Cardinale, Jr.

Treasurer Rod provided a Summary of Revenue & Expenses to the members.

	Current Period Actual
Total Expenses:	\$ 42,094
Total Income:	<u>\$ 15,792</u>
Income <Deficiency> Over Expenses	<\$ 26,301>

Rod moved that the actions of the Treasurer in paying the routine bills during the Fourth Quarter of the fiscal year 2016-2017 be ratified. The motion was carried.

REPORTS OF APPOINTED OFFICERS

Executive Advisor, Inter-Association & Ways & Means: Mary J. Beaudrow, CCLS, Past President (2014-2016)

Mary thanked the 22 associations that responded to her Directive and referred everyone to her report which listed what some of the associations are doing to raise money. I was very excited when she announced **(Our Very Own)** Crab Feed which made \$7,534 and was highest money maker on her report!!!! **Go Team SCCoLPA!!!!**

Parliamentarian: Kristi L. Edwards, CCLS

Kristi announced that even though she did not distribute a Directive this quarter she had been kept busy. As reported at the Pre-Annual Conference Board of Governors Meeting, the student membership ad hoc committee was very busy doing research, meeting with attorneys and analyzing all the responses that were received from the questionnaire sent to local associations on the subject. She reported that she dealt with issues on Bylaw revisions, election protocol, life membership, and the like. Kristi also announced that she is now a proud card-carrying member of the National Association of Parliamentarians.

Editor, *The Legal Secretary*: Barbara Barregar, CCLS

Barbara thanked the officers, Governors, guest writers and members who submitted articles to *The Legal Secretary* magazine. She also reminded and encouraged the membership to submit an article anytime.

Barbara went on to announce the winners of the 2017 Bulletin Contest:

Class A:	San Gabriel Valley LSA (1 st Place), Conejo Valley LPA (2 nd Place)
Class B:	Stockton-San Joaquin Co. LPA (1 st Place)
Class C:	Alameda County LPA (1 st Place), Merced LPA (2 nd Place)
Class D:	None Entered
Class E:	San Francisco LPA (1 st Place), Los Angeles LSA (2 nd Place) (Our Very Own) Santa Clara County LPA (3rd Place)
Class F:	Sacramento LSA

Legal Specialization Sections Coordinator: Dawn R. Forgeur, CCLS

Dawn reported that the LSS Section membership period will be changed to make it

consistent with LSI's fiscal year membership. Instead of having the membership period August 1 - July 31, it will be **May 1 - April 30**. She also wanted to thank the Section Leaders and all the members who emailed articles and updates for use in the newsletters. Dawn wanted everyone to know that at this time there are no webinars on the books, but that she and her team are working together to be able to offer one soon.

The General Assembly recessed for lunch at 11:48 a.m.

SECOND SESSION OF GENERAL ASSEMBLY OF DELEGATES

The Second Session of the General Assembly commenced at 2:02 p.m. There were 78 registered Delegates, 68 Delegates present and 10 Delegates absent. The Acting Official Registrar of Delegates (**Our Very Own**) Linda Neuman declared a quorum.

REPORTS OF COMMITTEE CHAIRMEN

2017 Annual Conference Chair: Diane M. Mecca

Diane was VERY excited to invite the members to Modesto this weekend for the 83rd LSI Annual Conference, and hoped everyone was having fun so far.

2018 Annual Conference Co-Chairs: Annette Davis and Mae Chester, CCLS

Annette and Mae reminded the membership to save the date, May 17-20, 2018, when San Fernando Valley LSA will be holding the 84th LSI Annual Conference at the Garland Hotel in North Hollywood. The estimated scrip ticket will be \$145 and lunches will be approximately \$35. Projected room rates will be \$199 single/double and the rooms will have complimentary wireless internet, a safe and a refrigerator/beverage center.

Advertising: Larry McGrew

Larry reported that advertising is all about promoting your services to your community. He hopes that he has helped associations realize their potential growth through advertising opportunities. He was VERY excited to announce that a new "LSI Vendor Recognition" page has been added to *The Legal Secretary* magazine. He encouraged the membership to view this new recognition page in the May issue on page 32.

California Certified Legal Secretary: Terrie Quinton, CCLS

Terrie announced that the names of the new CCLSs that took the exam in March of 2017. All CCLSs who passed the exam in either October of 2016 or March of 2017 will be honored and given their certificates at the Saturday Evening Banquet.

Career Promotion/Scholarship: Sylvia Marsh

It was with sadness that Sylvia reported that the number of scholarship applications received by LSI continues to dwindle. Of the 36 Associations, she received 9 applications from only 5 Associations. She made a plea to help her give away scholarship money.

Legal Procedure: Becky J. Neidhardt

Becky wanted the membership to know that there were over 500 court announcements, updates and/or notices posted to the LSI Blog this past year. Blog items are not only about procedural changes or new rules but, they contain a variety of topics related to the legal field, courts and the State Bar. She encourages members and non-members to sign up for email notifications of Blog updates.

Legal Secretarial Training/Seminar: Shaylene Cortez, CCLS

Shaylene was HAPPY to report that the online courses (Beginning Legal Secretary Training (3 sessions) and California State Court Discovery (2 sessions) generated approximately \$15,000 in income. On the other hand Shaylene is having trouble carving out enough time to keep the online programs going. Some suggestions have been made about hiring an outside source to help with the program or simply having some additional LSI members help with running such a program. Time will tell.

Professional Liasion/Day in Court: Rachel Malerbi

Rachel referred to her report wherein she listed some suggestions on how to help promote, support and partner with local bar associations. Some of those suggestions were: Invite the President of the Local Bar to a meeting, social event, installation; Ask if you can link your association website to the bar association's website; send the local bar association a marketing packet promoting your association, etc. She also reminded the membership to continue LSI's common goal to develop supportive relationships and interactions with other legal professionals in your community and continue to promote your association and LSI.

California Certified Legal Secretary Certifying Board: (Our Very Own) Elise Dresser, CCLS

Elise reported that this year 41 individuals sat for the CCLS Examination and 14 individuals pass in the October 2016 and March 2017. There are currently 245 active CCLSs, 19 inactive, 7 attorneys and 122 retired CCLSs. Elise encouraged local associations to promote and educate their members on what a CCLS is, and reach out whenever you can to promote the CCLS program. The Certifying Board also awarded two fee waivers for the upcoming CCLS exams. Winner of the fee waivers were Riverside LPA and Sacramento LSA.

The final session of the General Assembly of Delegates commenced on Sunday morning at 9:46 a.m. There were 78 registered Delegates, 70 Delegates present and 8 Delegates absent. Acting Official Register of Delegates **(Our Very Own)** Linda Neuman declared a quorum was present.

Executive Secretary Lynne Prescott, CCLS read the Courtesy Resolution which expressed LSI's express gratitude to all who made this annual conference a huge success. It was moved and seconded and the resolution was adopted.

With no further business, the meeting of the General Assembly was adjourned at 10:45 a.m. The 84th Annual Conference will be held May 17-20, 2018 at the Beverly

Garland in North Hollywood, CA. Host Association is San Fernando Valley LSA.

Respectfully submitted,
Linda Neuman
PROUD Governor of SCCoLPA



SCCoLPA Annual Conference Delegates: M'Liss Bounds, Shannon Quigley, and Elise Dresser, CCLS.



*Linda Neuman, Official Registrar for LSI's 83rd Annual Conference and
Sheila Byers, CCLS, Assistant Registrar.*



Santa Clara County reporting to conference!



LSI Treasurer Rod Cardinale, Jr. presenting his annual report



LSI Treasurer Rod Cardinale, Jr. and Executive Advisor/LSI Past President Mary J. Beaudrow, CCLS (with guest appearance by Norbert)



Recipients of the 2016-2017 Bulletin Contest ribbons and certificates. SCCoLPA came in third place in its group!



Looking good SCCoLPA!!

Member in the Spotlight July 2017

Theresa Wolcuff

~by Shannon Quigley, Vice President of Membership~

SCCoLPA's July Spotlight Member is Theresa Wolkoff. Theresa was born and raised in San Francisco near Ocean Beach and when she was not attending school at St. Monica's, she enjoyed the rides at "Playland at the Beach." After her eighth year of school, the family moved to Switzerland when the World Health Organization in Geneva hired her stepfather to work for them. He just happens to be one of the top 10 scientists in the world for parasitic diseases.

While in Switzerland, Theresa completed her 9th and 10th year of school, coming back to San Francisco for her 11th year. When her parents retired and moved to Spain, she joined them for six months. After taking six months off, Theresa learned that the schools in Spain are not accredited in the United States and she needed more credits to graduate. Going on the advice of her mother, Theresa returned to the States and in 1980 graduated from court reporting school.



Theresa likes challenges and says that is what motivates her. She believes that is why she likes her job so much. Just recently, she went to a deposition only to discover there would be no less than seven attorneys. How is that for a challenge? Her motto is to "Never, never, never give up." and attributes her success to those words.

If you were to look at just one day in Theresa's life on the job, it would look something like this: Your workday would begin at 10:00 a.m. at a lawyer's office. Your assignments are different every day and you have no idea what you are walking into. You go somewhere different every day. Your assignment could be anything from Workers' Compensation, a divorce, to an auto accident, or slip and fall. You never know how long it is going to last and every attorney has their own modus operandi for taking a deposition so you have to be prepared to stay all day, if necessary.

Even with those ever-changing assignments, Theresa says that since every story is different the best part is that it lends to a more interesting job and she never, never, never gives up on any assignment! When asked about her experience as a member of Santa Clara County Legal Professionals Association she said she commends the members for going beyond their daily work schedule to attend the meetings and take

the California Certified Legal Secretary exam to further themselves in their field. Theresa enjoys the speakers and always learns something new. By attending the meetings, Theresa has even assisted other court reporting firm owners cover jobs. We thank Theresa for her continued support and congratulate her as our July Spotlight Member!

WELCOME TO OUR NEW MEMBERS!

SCCoLPA extends a warm welcome to the following new member this month:

Nicole Gauthier

We hope to see you at our upcoming meetings, workshops, fundraising and networking events!

Order in the Court

~By Elena K. Schneider, CCLS, SCCoLPA Parliamentarian ~

What Does "Jus Soli" Mean?

Dating back to the days of feudal fiefdoms, the rule of *jus soli* - from the Latin, "the law of the land" - has come to mean that a person is a citizen of the country where he or she is born. In the United States, this rule is reinforced by the Fourteenth Amendment to the Constitution: "All persons born or naturalized in the United States, and subject to the jurisdiction thereof, are citizens of the United States and the State wherein they reside." The exception to this rule are children of foreign leaders, ministers, or ambassadors. In recent times, as immigration has become a hot-button issue, *jus soli* is increasingly a controversial rule. By law, when an illegal alien gives birth on U.S. soil, that child is automatically a U.S. citizen and is entitled to all the rights, privileges, and assistance that would be given to any other citizen. That the mother has illegally entered the country, often in the last stages of pregnancy, does not counteract the rule of *jus soli*.



CCLS Monthly Quiz

~~~~

Are you interested in attaining your California Certified Legal Secretary certification? Certification is achieved by passing a comprehensive full-day examination. Candidates are tested in California legal procedures, legal terminology, performance skills, reasoning and ethics, law office administration, ability to communicate effectively, and legal computations. A minimum of two years' experience is required. Continuing legal education requirements must be met for recertification.

Each month we will present a mini "mock" quiz to give you a sense of what the exam covers. The exam is administered twice a year, in March and September and is given in various locations throughout the state. If you are interested in applying to sit for the next exam, which is scheduled to take place on September 16, 2017, please fill out an exam application, which can be found on SCCoLPA's website, or LSI's website at [www.lsi.org](http://www.lsi.org).

### Legal Terminology - Abbreviations

Select the correct answer:

1. **and others**
  - (a) et al.
  - (b) et. al.
  - (c) *et. al.*
2. **section**
  - (a) sec.
  - (b) s.
  - (c) sect.

3. **in the same place**
  - (a) id.
  - (b) *ibid.*
  - (c) *id*
4. **that is**
  - (a) i.e.
  - (b) ie.
  - (c) e.g.
5. **compare**
  - (a) comp.
  - (b) *cf*
  - (c) cf.
6. **California Appellate Reports**
  - (a) Cal.
  - (b) Cal.App.
  - (c) Cal. App.
7. **and the following**
  - (a) et seq.
  - (b) et. seq.
  - (c) *et seq*
8. **edition**
  - (a) edn.
  - (b) ed.
  - (c) edtn.
9. **opinions**
  - (a) ops.
  - (b) op.
  - (c) opns.
10. **Federal Reporter, Second Series**
  - (a) Fed.2d
  - (b) Fed. 2d
  - (c) F.2d
11. **California Reports**
  - (a) Cal.
  - (b) Cal.App.
  - (c) Calif.Rept.
12. **under the name of**
  - (a) sub.nom
  - (b) *sub nom.*
  - (c) sub nom
13. **for example**

- (a) e.g.
- (b) eg
- (c) i.e.

14. **Volume**


- (a) vol.
- (b) vol
- (c) v.

15. **Court of Appeal**

- (a) C.App.
- (b) Court App.
- (c) Ct.App.

**ANSWER KEY**

- 1. a
- 2. a
- 3. b
- 4. a
- 5. c
- 6. b
- 7. a
- 8. b
- 9. c
- 10. c
- 11. a
- 12. b
- 13. a
- 14. a
- 15. c




**LSI**  
Educating California's  
Legal Support Professionals

LEGAL SECRETARIES, INCORPORATED

**CCLS ON-LINE STUDY GROUP**

JULY 11, 2017 – SEPTEMBER 12, 2017



If you are interested in studying for the California Certified Legal Secretary ("CCLS") Exam,\*\* join LSI's CCLS On-Line Study Group. During the classes, all topics covered in the CCLS exam will be reviewed, including:

- California Legal Procedure (civil, family, probate, real estate, corporate)
- Legal Terminology (citations, terminology)
- Legal Computations (calendaring, math)
- Skills (proofreading, following directions)
- Ability to Communicate Effectively (grammar, punctuation, word usage)
- Law Office Administration (computers, filing)
- Reasoning & Ethics (ability to act reasonably and ethically)

Lectures and materials will be posted no later than 8 pm on Sundays. Students may complete the material at their convenience. Access information will be provided upon enrollment in the classes.

**FIRST LECTURE WILL BE POSTED SUNDAY, JULY 9, 2017**

The cost of the 10-week Study Group is \$100 for LSI members and \$125 for non-LSI members taking classes for first time; and \$50 for LSI members and \$75 for non-LSI members repeating. Each individual must register separately.



The cost of the 10-week Study Group is \$100 for LSI members and \$125 for non-LSI members taking classes for first time; and \$50 for LSI members and \$75 for non-LSI members repeating. Each individual must register separately.

### NEXT CCLS EXAM SATURDAY, SEPTEMBER 16, 2017

PLEASE NOTE THE SECOND EXAM OF THE YEAR IS NOW THE THIRD SATURDAY IN SEPTEMBER

Students will be provided with homework and handouts. **Students are responsible for providing their own Law Office Procedures Manual, The Gregg Reference Manual (11th Ed.), California Style Manual (4th Ed.), and Pocket Guide to Legal Ethics, NO LATER THAN the start of the classes.** Students are also encouraged to have the CCLS Study Guide.

**\*\*All examinees must meet eligibility guidelines outlined in the CCLS Information Kit on LSI's website.**

#### CCLS STUDY GROUP REGISTRATION

(Please type or print clearly)

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

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

Daytime Phone: \_\_\_\_\_ Evening Phone (during class time): \_\_\_\_\_

Email (during class time): \_\_\_\_\_

Payment: Check # \_\_\_\_\_ Credit Card # (Visa/MC only) \_\_\_\_\_

Exp. Date: \_\_\_\_\_ Sec. Code: \_\_\_\_\_

**DEADLINE TO REGISTER IS JUNE 30, 2017.** Send registration to Terrie Quinton, CCLS, LSI CCLS Chair, c/o Duckor Spradling Metzger & Wynne, 101 W. Broadway, Ste. 1700, San Diego, CA 92101 or email [lsiccls@outlook.com](mailto:lsiccls@outlook.com) (with credit card information). You may also pay via PayPal at [www.lsi.org](http://www.lsi.org). **NO REFUNDS AFTER JULY 5, 2017.**

STRIVE FOR SUCCESS – BE A CCLS!



California Certified Legal Secretary  
A Program of LSI®



### APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LSI Membership Card (if applicable), and fees to:

**April K. Ignaitis, CCLS, CCLS Certifying Board, P.O. Box 2879, Cupertino, CA 95015**

(Select one)

☐

Northern California  
Southern California

(Select one)

☐

Saturday, September 16, 2017  
Saturday, March 17, 2018

- **Deadline:** Applications must be received 60 days prior to the examination date.
- **Late Application:** Late Fees apply when Applications are received less than 60 days (but not less than 30 days) prior to the examination date, and accepted only if space is available.
- **Deferral:** Requests to defer to the next exam must be received at least 30 days prior to the exam date.

| EXAMINATION FEES<br>(Select Payment Type)   |                 | Check <input type="checkbox"/><br>Payable to "LSI"<br>Mail to above address | PayPal <input type="checkbox"/><br>Email exam application to<br><a href="mailto:CCLSCertifyingBoard@gmail.com">CCLSCertifyingBoard@gmail.com</a><br>Payment link will be provided upon<br>confirmation of eligibility to sit for exam. |
|---------------------------------------------|-----------------|-----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>LSI Members</b> <input type="checkbox"/> |                 | <b>Non-LSI Members</b> <input type="checkbox"/>                             |                                                                                                                                                                                                                                        |
| On Time Registration Fee                    | \$ 25.00        | On Time Registration Fee                                                    | \$ 75.00                                                                                                                                                                                                                               |
| Examination Fee*                            | 100.00          | Examination Fee*                                                            | 100.00                                                                                                                                                                                                                                 |
| Late Fee (if applicable)                    | 30.00           | Late Fee (if applicable)                                                    | 30.00                                                                                                                                                                                                                                  |
| <b>TOTAL DUE w/o Late Fee:</b>              | <b>\$125.00</b> | <b>TOTAL DUE w/o Late Fee:</b>                                              | <b>\$175.00</b>                                                                                                                                                                                                                        |

#### Personal Information

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

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

Last 4 digits of SSN: \_\_\_\_\_ Email: \_\_\_\_\_

Phone (Day): \_\_\_\_\_ Phone (Evening): \_\_\_\_\_

LSI Member: ☐ Yes (enclose copy of LSI Membership Card) ☐ No

Name of Local LSI Association: \_\_\_\_\_

#### Employment Information

Provide your legal secretarial employment beginning with your most recent (or current) employment in order to confirm that you have at least two years' experience. Attach a supplemental page if you have not been in your current position for two years.

Position: \_\_\_\_\_ Dates of Employment: \_\_\_\_\_

Employer: \_\_\_\_\_

your current position for two years.

|                                                      |                            |
|------------------------------------------------------|----------------------------|
| Position: _____                                      | Dates of Employment: _____ |
| Employer: _____<br><small>(name and address)</small> |                            |
| Supervisor: _____                                    | Supervisor's Phone: _____  |
|                                                      | Supervisor's Email: _____  |
| 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 not to be discussed with anyone, and that my employment record will be verified by a member of the California Certified Legal Secretary Certifying Board.

Date: \_\_\_\_\_

Applicant Signature \_\_\_\_\_

\*Fees subject to change without notice.  
Rev. February 2017

## Legal Procedures - The Latest News

**Superior Court of California, County of Santa Clara**  
**Civil Division and Probate Division Court Reporters**

Effective July 24, 2017, this policy regarding PRIVATELY RETAINED COURT REPORTERS is applicable to all Civil and Probate courtrooms, except as noted below.

**POLICY OF THE SANTA CLARA SUPERIOR COURT**

**TITLE: PRIVATELY RETAINED COURT REPORTERS**

**PURPOSE:** A party has the right to arrange, at the party's own expense, for the services of a court reporter if the services of an official court reporter are not available for a proceeding. (Government Code Section 68086 and California Rules of Court, rule 2.956.) This document establishes the policy for a party arranging for a privately retained court reporter when an official reporter is not available and establishes requirements for qualifying as an official reporter pro tempore.

**APPLICATION OF THIS POLICY:** This policy applies only to hearings and trials in the Civil Division and the Probate Division in unlimited civil matters, limited civil matters to the extent not electronically recorded and probate matters. Court reporters will be provided by the Court in all of the following cases: felony criminal, family, dependency, Lanterman-Petris-Short (LPS) Act, guardianships of the person or estate, civil harassment and civil contempt – including any of these cases that are assigned for trial or hearing to the Civil Division, or to be heard by a Judge assigned to the Civil Division.

**POLICY:**

1. If the services of an official court reporter are not available for a proceeding, a party may privately arrange for court reporter services at the party's own expense, pursuant to Government Code Section 68086 and California Rule of Court, rule 2.956.
2. A party must make arrangements for a reporter in advance of the proceeding if the party wishes the proceedings to be reported. Parties retaining a reporter must file a *Stipulation and Appointment of Official Reporter Pro Tempore* (CIV-5063) with the court at least 5 days prior to the hearing. All parties or counsel who



wish the proceedings to be reported by the reporter to be appointed must sign the stipulation. If the judicial officer has not received the Stipulation in time to approve it before the hearing, the Court has discretion to deny the request.

- A. When a party arranges for a reporter, the reporter must be appointed as an official reporter pro tempore before the hearing begins. Every reporter must complete and sign sections 1, 2, and 3 of the *Stipulation and Appointment of Official Reporter Pro Tempore* (CIV-5063).
  - B. The Judicial Officer must sign the order appointing the reporter as an official reporter pro tempore, using the *Stipulation and Appointment of Official Reporter Pro Tempore* (CIV-5063), before the reporter may report the proceeding.
3. By signing the *Stipulation and Appointment of Official Reporter Pro Tempore* (CIV-5063), the reporter agrees to the following:
- A. The reporter has a valid, current California Certified Shorthand Reporter License and is in good standing with the Court Reporters Board of California.
  - B. The reporter is not a current employee of the court.
  - C. The reporter will provide current contact information with the court.
  - D. All fees for reporting services, including appearance, transcript and real-time fees, are the responsibility of the party or parties who arranged for the reporter services and may not be charged to the court.
  - E. The reporter will comply with statutes and rules applicable to official reporters pro tempore, including the duty to timely prepare transcripts, including those for appeals, in the proper form.
  - F. The reporter will demonstrate the highest standards of ethics and impartiality in the performance of his/her duties.
  - G. The reporter will comply with the court's requirements regarding uploading electronic archiving of notes within 48 hours of the date of the proceedings except in extenuating circumstances and as approved in advance by the Director of Court Services, or make other arrangements if the only notes are in paper form.

- H. The reporter will follow directions from the court and will be subject to the jurisdiction of the court to the same extent as an official reporter.
- I. The reporter will be available for read-back of notes taken during a jury trial within 30 minutes of the court's request.
- J. If providing real-time reporting or other litigation support services (e.g. LiveNote), the reporter is responsible for providing and connecting the necessary equipment. Instructions will be provided by the Director of Court Services.

#### 4. Additional Information for Parties and Reporters

##### A. Only One Official Record

There can be only one official record of court proceedings, and only a reporter appointed by the court may report a court proceeding. (Code of Civil Procedure Section 273; Government Code Sections 70043 and 70044; *Redwing v. Moncravie* (1934) 138 Cal. App. 432, 434.) Only one reporter will be allowed to report a court proceeding at any given time. If the parties cannot agree on a reporter, the judicial officer will make the selection. The transcript may not be modified except on court order.

##### B. Payment for Official Reporter Pro Tempore Services

The party arranging for an official reporter pro tempore is responsible for paying the reporter's fees, although the parties may arrange to share the fees at terms the parties negotiate. (California Rules of Court, rule 2.956(c).) All fees must be paid directly to the court reporter.

##### C. Fee Waivers Not Applicable

In cases where the court does not provide court reporters, litigants – including litigants with fee waivers – are not entitled to have the court provide or pay for a court reporter. Fee waivers apply only to fees charged by the court. They do not apply to court reporter fees and costs in cases where the court is not providing the court reporter. Privately retained court reporters are not paid by the court.

#### D. Transcripts

- 1) The judicial officer may order any party who arranges for the transcription of proceedings by the official reporter pro tempore to lodge a copy of the transcript with the court. (Code of Civil Procedure Section 128(a).)
- 2) Transcripts produced by an official reporter pro tempore will be treated, for court purposes, identically to transcripts prepared by official reporters. Reporting notes of an official reporter pro tempore are official records of the court. (Government Code Section 69955(a).) The notes of an official reporter pro tempore, when transcribed and certified, are prima facie evidence of the testimony and proceedings. (Code of Civil Procedure Section 273(a).)
- 3) Certified transcripts are admissible as evidence to the extent otherwise permitted by law. Transcripts prepared by a privately retained certified shorthand reporter appointed by the court as an official reporter pro tempore are admissible as evidence to the extent otherwise permitted by law. (Code of Civil Procedure Section 273(a).)
5. The *Stipulation and Appointment of Official Reporter Pro Tempore* (CIV-5063) is available as a form attachment to the Local Rules at [www.scscourt.org](http://www.scscourt.org).
6. This policy shall be posted on the court's website at [www.scscourt.org](http://www.scscourt.org).



## The ultimate eFiling checklist

Filing court-friendly documents in California




#### FORMATTED CORRECTLY

- ☐ 1.5 line spacing
- ☐ Cambria, Georgia, or Helvetica font
- ☐ 12-13 pt font
- ☐ 1.5 inch page margins
- ☐ Arabic page numbers
- ☐ Left align rather than justify text

[TELL ME MORE](#)

|                                                                                                                                                                                                                                                     |                                                                                                                                                                       |                              |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
| <input type="radio"/> 1.5 line spacing<br><input type="radio"/> 12-13 pt font<br><input type="radio"/> Arabic page numbers                                                                                                                          | <input type="radio"/> Cambria, Georgia, or Helvetica font<br><input type="radio"/> 1.5 inch page margins<br><input type="radio"/> Left align rather than justify text | <a href="#">TELL ME MORE</a> |
| <input type="checkbox"/> <b>HIGH QUALITY SCANS</b><br>Scan at 300 dots per inch (or pixels per inch)                                                                                                                                                |                                                                                                                                                                       |                              |
| <input type="checkbox"/> <b>EXHIBITS BOOKMARKED</b><br>In Adobe Acrobat: Select section > <b>CTRL + B</b> > add name and description of exhibit                                                                                                     |                                                                                                                                                                       |                              |
| <input type="checkbox"/> <b>CORRECTLY REDACTED</b><br>In Adobe Acrobat: Tools > Redact > <b>Mark for redaction</b> > Text & images. Select what you want to redact, then <b>Apply</b> and <b>OK</b> to confirm permanent changes.                   |                                                                                                                                                                       |                              |
| <input type="checkbox"/> <b>METADATA REMOVED</b><br>In Adobe Acrobat: Tools > Redact > <b>Remove hidden information</b> (on left side bar) > <b>Remove</b>                                                                                          |                                                                                                                                                                       |                              |
| <input type="checkbox"/> <b>TEXT SEARCHABLE</b><br>#1: In Word <b>Save as</b> > PDF<br>#2: In Adobe Acrobat Tools > <b>Enhance scans</b> > <b>Recognize text</b> > <b>In this file</b> . Confirm language > <b>Recognize text</b>                   |                                                                                                                                                                       |                              |
| <input type="checkbox"/> <b>FOLLOW SIGNATURE RULES</b><br>Documents not signed under penalty of perjury are considered signed when eFiled. If signed under penalty of perjury, the original must be retained and presented to the court on request. |                                                                                                                                                                       |                              |
| <input type="checkbox"/> <b>WITHIN FILE SIZE LIMITS</b><br>Confirm that your document does not exceed the maximum allowable size for uploads, and optimize if necessary. Check your local rules.                                                    |                                                                                                                                                                       |                              |
| <input type="checkbox"/> <b>CHECK DOCUMENT EXCEPTIONS</b><br>Certain documents, such as testamentary instruments, cannot be eFiled. Others, such as proposed orders, should be sent as editable documents. Check your local rules.                  |                                                                                                                                                                       |                              |



Get more resources at [www.onelegal.com/support](http://www.onelegal.com/support)

## Coming Soon!

You asked for quality educational classes, such as Microsoft Office, Adobe Acrobat, Calendaring, 100 Days Before Trial, Basic Legal Secretary Skills, E-filing, Discovery, and more. Look no further - keep your eyes peeled for updates on our website, our Facebook page, and our regular email blasts as we announce more educational workshops to be presented in the next several months.

**Coming up:** Attend our "eDiscovery" workshop







on August 24, 2017. A four-member panel of experts will discuss topics such as the processing of e-discovery, document review and productions, collection of forensic data, cybersecurity matters and data privacy, and database hosting. 90 minutes of MCLE credit will be provided.

Future educational workshops will include workplace/employee relations investigations, employee rights, probate, navigating court websites and local rules, e-filing in Santa Clara County, and discovery.

## Membership in SCCoLPA - Spread The Word!

Attention all members - thank you for renewing your membership with Santa Clara County Legal Professionals Association! By now you should have received the new password for the "Members Only" section of our website ([www.sccolpa.org](http://www.sccolpa.org)). Please take a few minutes to review the association's monthly financial reports, Governor's reports, minutes of monthly membership meetings, and more.

Please encourage your co-workers, colleagues, and friends to join SCCoLPA today!



## SANTA CLARA COUNTY LEGAL PROFESSIONALS ASSOCIATION

### 2017-2018 MEMBERSHIP/RENEWAL APPLICATION

Please make checks payable to: SCCOLPA  
Send to: SCCoLPA Treasurer  
P.O. Box 90509  
San Jose, CA 95109-3627

|                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Member's Name _____<br><br>Residence Address _____<br><br>Residence City and Zip Code _____<br><br>Residence Telephone Number _____<br><br>Residence Fax Number _____<br><br>E-Mail Address (Home) _____<br><br>PREFERRED E-MAIL: (Check One)<br>Residence: _____ Business: _____<br><br>Birthdate: _____<br>Month/ Day | *Title: [Examples at bottom of page] _____<br><br>Business Name _____<br><br>Business Address _____<br><br>Business City/State/Zip Code _____<br><br>Business Telephone Number/Business Fax Number _____<br><br>E-Mail Address (Work) _____<br><br>Field of Law _____<br><br>Year I became a member of SCCoLPA: _____<br><br>How many years with SCCoLPA? _____ |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

If accepted as a member, I agree to be bound by the bylaws and standing rules of Legal Secretaries, Incorporated, and/or the local association, whichever are applicable 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 and/or Santa Clara County Legal Professionals Association, 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 1980-1982)"*

|                              |                             |
|------------------------------|-----------------------------|
| Applicant's Signature: _____ | Date: _____                 |
| Sponsor: _____               | Application Approved: _____ |

\*Title: [Your Title/Certification in the Legal Field - EXAMPLES: CCLS California Certified Legal Secretary; PLS Professional Legal Secretary; CLA Certified Legal Assistant; (Or) Paralegal; Legal Assistant; History Public; Office Manager; etc.]

Application/Renewal Form 2017-2018

### MEMBERSHIP DUES<sup>1</sup>

PLEASE CHECK THE APPROPRIATE BOX(ES) BELOW

- ☐ ACTIVE MEMBER (\$55.00 - New Member)
- ☐ ACTIVE MEMBER (\$45.00 - Renewing Member)
- ☐ ASSOCIATE/STUDENT MEMBER (\$35.00 - New Member) (Students, please attach proof of enrollment to this application)
- ☐ ASSOCIATE/STUDENT MEMBER (\$25.00 - Renewing Member) (Students, please attach proof of enrollment to this application)

☐ ASSOCIATE/STUDENT MEMBER (\$35.00 - New Member) *(Students, please attach proof of enrollment to this application)*

☐ ASSOCIATE/STUDENT MEMBER (\$25.00 - Renewing Member) *(Students, please attach proof of enrollment to this application)*

☐ RETIRED MEMBER: ☐ A (\$20.00) ☐ B (\$0.00)

☐ DISABLED MEMBER: ☐ A (\$20.00) ☐ B (\$0.00)

☐ LIFE MEMBER *(If a life member desires to retain active membership status, full payment of dues is required)*

## MEMBERSHIP CATEGORIES

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Active Member:</b>    | Dues for an Active Member of this Association shall be \$25.00 per year, plus \$20.00 per capita tax to LSI for total of \$45.00, following payment the first year of \$55.00 which includes a one-time only \$10.00 initiation fee.                                                                                                                                                                                                                                                                                        |
| <b>Associate Member:</b> | <p>Candidates with less than one year in a law-related environment, or enrolled in an academic program involved in legal studies and not employed in the legal field.</p> <p>Dues for an Associate Member of this Association shall be \$25.00 per year, following payment the first year of \$35.00 which includes a one-time only \$10.00 initiation fee.</p> <p>Associate Membership as defined in the By-laws shall include any student enrolled in a certified educational program recognized by this Association.</p> |
| <b>Retired Member:</b>   | <p>Age 62, retired from employment, wishing to retain active status:</p> <p>A. Less than 10 years in SCCoLPA, payment of \$20.00 LSI per capita taxes.<br/>B. More than 10 years in SCCoLPA, no payment.</p>                                                                                                                                                                                                                                                                                                                |
| <b>Disabled Member:</b>  | <p>Must present certification of permanent disability and request to retain active status:</p> <p>A. Less than 10 years in SCCoLPA, payment of \$20.00 LSI per capita taxes.<br/>B. More than 10 years in SCCoLPA, no payment.</p>                                                                                                                                                                                                                                                                                          |
| <b>Life Member:</b>      | Granted upon vote of the members to any member who has performed outstanding services to the Association. If a life member desires to retain active membership status, full payment of dues is required.                                                                                                                                                                                                                                                                                                                    |
| <b>Delinquent Dues:</b>  | <p>When dues are not paid to the Association within thirty (30) days after the due date, such dues shall become delinquent, and such member shall without notice be suspended and shall lose all rights and privileges as a member of this Association.</p> <p>Such suspended member may be reinstated during the current fiscal year upon payment of the current annual dues, plus a reinstatement fee of \$5.00.</p>                                                                                                      |

<sup>2</sup> A \$3.00 processing fee will be applied to all online payments (PayPal) to cover fees. Renew online at [www.sccolpa.org](http://www.sccolpa.org).

## Help Wanted - Current Employment Opportunities

Did you know that you can view current job opportunities and openings in the local legal community on our website?

Our Employment Chair, Elena Schneider, CCLS, has been busy this month collecting and posting new job openings for positions such as legal assistants, legal secretaries, administrative assistants, and more, for many of the top firms in Santa Clara County. Go to our website ([www.sccolpa.org](http://www.sccolpa.org)) and check it out!



## Volunteers Needed!

The Bay Area Legal Forum is comprised of members from the local Bay Area associations, and presents educational workshops throughout the year, including the always-popular "Changes in the Law" full-day workshop each January. If you are interested in volunteering on the Bay Area Legal Forum as a representative from SCCoLPA, please contact President Elise Dresser, CCLS, at [endresser@gmail.com](mailto:endresser@gmail.com).

## Happy Birthday to Our Members!

Happy Birthday to the following SCCoLPA members:

Yun-Ru Cho - July 22  
Elizabeth Bond - July 22  
Mary Doyen - July 23  
Angelica Pizarro-Calvo - July 31



**BEGINNING LEGAL SECRETARIAL  
TRAINING CLASS**





## BEGINNING LEGAL SECRETARIAL TRAINING CLASS

LSI will be offering its Beginning Legal Secretarial Training Class online. This class will be an eight-week, work-at-your-own-pace online session commencing July 10 and ending September 4, 2017. During the classes, the following topics will be covered:

Introduction to the Law Office  
Duties of the Legal Secretary  
Effective Telephone Skills  
Effective Oral Communication Skills  
Effective Written Communication Skills  
Calendaring and Timetables  
Basic Grammar Skills

Transcription and Proofreading Techniques  
Court Structure  
Citations  
Service of Legal Documents  
Preparing a Proper Caption  
Preparation of Documents Filed with the Court  
Basics of Civil Litigation

### CLASS SESSION OPENS ON MONDAY, JULY 10, 2017

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

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

### BEGINNING LEGAL SECRETARIAL TRAINING CLASS REGISTRATION

(Please type or print clearly)

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

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

City/Zip: \_\_\_\_\_ Telephone: \_\_\_\_\_

\$150 LSI Member \_\_\_\_\_ Association: \_\_\_\_\_ LSA/LPA

\$200 Non-LSI Member \_\_\_\_\_

Payment: Check # \_\_\_\_\_ (made payable to LSI)  
(Note: Checks must clear before books will be mailed and may cause a delay in access to the class.)

Name on Card: \_\_\_\_\_

Visa/MC Credit Card # \_\_\_\_\_

Exp. Date: \_\_\_\_\_ 3-digit CVV No.: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Email registration form NO LATER THAN July 5, 2017, to LSI Legal Professional Training/ Seminar Chair, [training@lsi.org](mailto:training@lsi.org) or mail to LSI, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. Registration will also be offered online at [www.lsi.org](http://www.lsi.org) with PayPal. Keep in mind books will not be mailed until registration is processed. For further information or inquiries, email [training@lsi.org](mailto:training@lsi.org). No refunds after July 10, 2017. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study.

*LSI – Educating California's Legal Professionals*

## STOCKTON-SAN JOAQUIN COUNTY LEGAL PROFESSIONALS ASSOCIATION

INVITES YOU TO A

## MISSION: Possible\*

\* "Get Smart" with Education

LSI 1<sup>ST</sup> QUARTERLY CONFERENCE

AUGUST 18-20, 2017

The Stockton Hilton  
2323 Grand Canal Blvd.  
Stockton, California 95207

### CONFERENCE REGISTRATION FORM

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

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



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

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

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

Home/Cell Telephone: \_\_\_\_\_

Work Telephone: \_\_\_\_\_

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

Local Association (please spell out): \_\_\_\_\_

PLEASE INDICATE IF YOU ARE:

☐ State Officer \_\_\_\_\_

☐ State Chairman \_\_\_\_\_

☐ Governor ☐ OCLS ☐ PLS

SCRIP (includes Registration, Welcome Reception, Banquet and Brunch):

POSTMARKED ON OR BEFORE JULY 18, 2017 \$ 123.00 \$ \_\_\_\_\_

POSTMARKED AFTER JULY 18, 2017 \$ 133.00 \$ \_\_\_\_\_

INDIVIDUAL TICKETS:

Registration PRIOR to July 18, 2017 \$ 20.00 \$ \_\_\_\_\_

Registration AFTER July 18, 2017 \$ 30.00 \$ \_\_\_\_\_

WELCOME RECEPTION (Friday) \$ 25.00 \$ \_\_\_\_\_

LUNCHEONS

Presidents' Luncheon (Saturday) \$ 24.00 \$ \_\_\_\_\_

Governors' Luncheon (Saturday) \$ 24.00 \$ \_\_\_\_\_

Open Luncheon (Saturday) - Open to All \$ 24.00 \$ \_\_\_\_\_

☐ Greek Chicken Wrap ☐ San Joaquin Asparagus Wrap

BANQUET (Saturday Evening) \$ 58.00 \$ \_\_\_\_\_

☐ New York Steak ☐ Salmon ☐ Vegetable Napoleon

BRUNCH (Sunday) \$ 30.00 \$ \_\_\_\_\_

TOTAL AMOUNT ENCLOSED \$ \_\_\_\_\_

Special Dietary Restrictions \_\_\_\_\_

**PLEASE MAKE CHECKS PAYABLE TO SSJCLPA AUGUST CONFERENCE**

**RETURN THIS FORM WITH PAYMENT TO REGISTRATION CHAIR:**

Jan Kuykendall, 11662 N. Ham Lane, # 41, Lodi, CA 95242;

For questions call Jan Kuykendall evenings at 209 747-4781 or email [ssjclpa@gmail.com](mailto:ssjclpa@gmail.com) or

Colleen Young at 209- 609-4042 or email [ssjclpa@gmail.com](mailto:ssjclpa@gmail.com)

**NO REFUNDS AFTER AUGUST 1, 2017**

**STOCKTON-SAN JOAQUIN COUNTY LEGAL PROFESSIONALS ASSOCIATION**

INVITES YOU TO A

**MISSION: Possible\***

\* "Get Smart" with Education

LSI 1<sup>ST</sup> QUARTERLY CONFERENCE  
AUGUST 18-20, 2017



**HOTEL REGISTRATION FORM**



2323 Grand Canal Boulevard  
Stockton, California 95207  
(209) 957-9090

Free Parking  
Free WiFi

No Airport Shuttle Services Available

Please contact hotel directly at (800) 445-8667 or book online at:  
<http://www.hilton.com/en/hil/groups/personalized/S/SCKSTHF-LEGAL-20170817/index.jhtml>

**ROOM RESERVATIONS:** \$ 129.00 single/double

**GROUP CODE: LEGAL**

**CHECK IN/OUT:**  
Check-in Time: 3:00 p.m. / Check-out Time: 12:00 noon

-----

**TOP SECRET**

**CONFIDENTIAL**

**CHECK IN/OUT:**  
Check-in Time: 3:00 p.m. / Check-out Time: 12:00 noon

**AIRPORTS:**  
Sacramento International (approx. 50 miles)

**FOR FURTHER INFORMATION CONTACT:**

Jan Kuykendall - Conference Co-Chair [ssicopa@gmail.com](mailto:ssicopa@gmail.com) or phone: (209) 747-4781  
or  
Colleen Young - Conference Co-Chair [ssicopa@gmail.com](mailto:ssicopa@gmail.com) or phone: (209) 609-4042

**DEADLINE FOR GROUP RATE IS  
JULY 30, 2017**

**TOP SECRET**  
**CONFIDENTIAL**  
**FOR YOUR EYES ONLY**

## LEGAL SPECIALIZATION SECTIONS 2017-2018 Membership Form

MAY 1, 2017 - APRIL 30, 2018

Membership includes access to free quarterly workshops at LSI conferences for those sections you are a member of; quarterly newsletters that include changes to the law and forms; discounted LSS webinars; statewide roster of all LSS members in each section for easy access to local procedural information in other counties; and networking opportunities. The Legal Specialization Sections (through LSI) offer continuing legal education credit for California Certified Legal Secretaries and MCLE for paralegals and attorneys.

**JOIN OR RENEW AT [WWW.LSI.ORG](http://WWW.LSI.ORG)**  
**PAY VIA CREDIT CARD OR PAYPAL**

### SECTIONS

(circle which sections you are joining)

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

### LSI Member Rates:

Individual Section: \$20

All Six Sections: \$75

### Non-LSI Member Rates:

Individual Section: \$40

All Six Sections: \$150

If paying by check, make payable to "LSI" and mail to the LSS Coordinator. This information is distributed to all members of the Legal Specialization Sections.

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

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

LSI Member, Local Association/MAL: \_\_\_\_\_

Legal Specialty(ies): \_\_\_\_\_

Counties/Courts: \_\_\_\_\_

Newsletters are emailed to members, if you would like to opt out, please email the LSS Coordinator.

**Dawn R. Forgeur, CCLS**  
**LSS Coordinator**

c/o Stoel Rives LLP  
500 Capital Mall, Ste. 1600  
Sacramento, CA 95814

E-mail: [dawn.forgeur@stoel.com](mailto:dawn.forgeur@stoel.com)  
[www.lsi.org](http://www.lsi.org)



Newsletters are emailed to members, if you would like to opt out, please email the LSS Coordinator.



## *San Francisco Legal Professionals Association*

### **July 25, 2017 Brown Bag Presentation**



#### **IP LITIGATION: WHY IT'S SO IMPORTANT TO PROTECT WHAT YOUR MIND CREATES!**

**Presented by Jeff Knowles**

Here in Bay Area, the tech capital of the world, Intellectual Property is one of the largest growing specialized law practices. Do you ever wonder why it's such a fuss to download your favorite song from just any website? This presentation will give members an understanding of what Intellectual Property entails and why it's such an important law practice right now.

**Tuesday, July 25, 2017**

**12:30 – 1:30 p.m.**

**Coblentz Patch Duffy & Bass LLP**

**One Montgomery Tower (Enter through 120 Kearney St.), Suite 3000,  
San Francisco, CA 94104**

RSVP to: Francie Skaggs – [francieskaggs@gmail.com](mailto:francieskaggs@gmail.com) - by: Friday, July 21, 2017

One Hour MCLE Credit & CCLS Continuous Education Certificates Available. This event is open to anyone in the legal industry. Feel free to share with your colleagues and friends. Attendees are encouraged to bring your lunch and enjoy the presentation.

#### **About the Speaker:**



A co-managing partner of Coblentz, Jeff Knowles is a trial lawyer practicing complex commercial litigation with an emphasis on intellectual property matters. He has specific expertise in copyright, trademark, trade secret, Lanham Act, and other unfair competition cases, with deep experience in music-related litigation. He has represented clients in a broad array of industries, from music and Internet technology to consumer products and real estate.

Jeff served as a law clerk to the Honorable Eugene F. Lynch of the United States District Court for the Northern District of California (1987-1988), and prior to joining the firm, worked as a trial attorney for the U.S. Department of Justice in Washington, D.C. where he represented federal agencies in national impact litigation.

**The SFLPA is an accredited MCLE Provider through Legal Secretaries, Incorporated. For more information about the programs offered through the SFLPA, visit our website at: [www.SFLPA.org](http://www.SFLPA.org).**



**LSI**  
Educating California's  
Legal Support Professionals

### **The Continuing Education Council**



## The Continuing Education Council

PROUDLY PRESENTS



CALIFORNIA STATE ASSEMBLY

Darci Sears

Special Assistant to Anthony Rendon, Speaker of the Assembly

### CANNABIS: A COMBINED MEDICAL AND RECREATIONAL SYSTEM

An overview of the combined system for licensing cannabis businesses  
in California with updates on pending legislation, regulations, etc.

**FRIDAY, AUGUST 18, 2017\***

5:15 p.m. to 6:15 p.m.

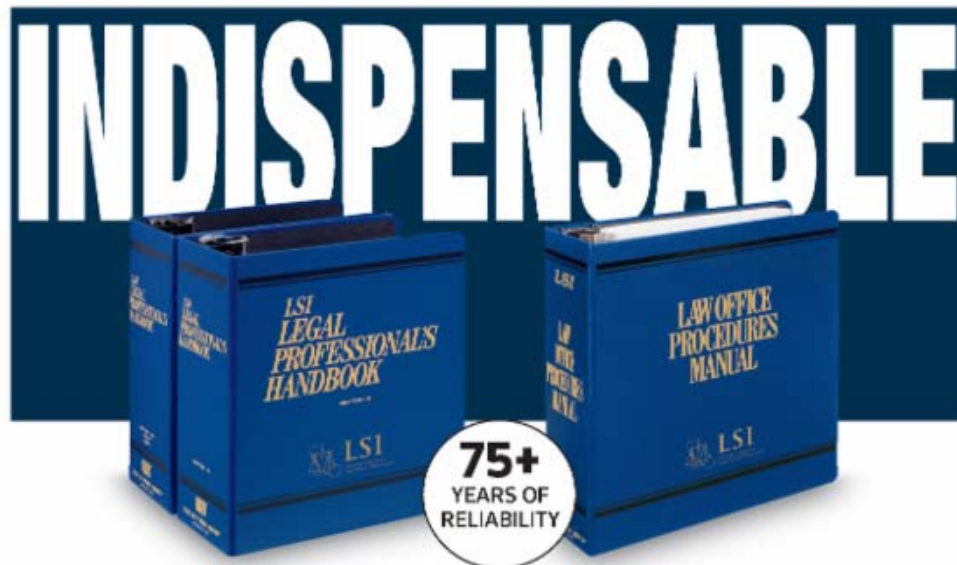
\*\*\*\*\*

THE STOCKTON HILTON

Email reservations to: J. Cori Mandy, CCLS  
jemandy5@gmail.com  
619-515-3256 or 619-954-3603

\*Seminar is free with a paid conference registration

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 1.0 hour.



### LEGAL PROFESSIONAL'S HANDBOOK

...THE ULTIMATE RESOURCE GUIDE!

Busy lawyers rely on their staff to handle many details of their practice. They look to you, as a professional, to know

### 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

**...THE ULTIMATE RESOURCE GUIDE!**

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LSI MEMBERS-ONLY PRICE .....\$331.80  
Nonmembers Price.....\$474

Price includes shipping. Add applicable sales tax.  
This title is updated annually for subscribers  
by replacement pages.

**...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. 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 secretaries 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.....\$182.70  
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by replacement pages.

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Combo price for both books.....\$514.50  
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in code **CHILL17** in the promo code field.**CALL US: 800.211.DEPO**Mention the code  
**CHILL17** when scheduling.

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## Any Questions for Your Executive Committee? Contact Us!

We always want to hear from you! If you have any ideas or suggestions as to how we can make our association the best in the state, please reach out to a member of the Executive Committee. The board meets on the first Tuesday of every month, and anyone is welcome to attend. Your Executive Officers for 2017-2018 are:

President

Vice President - Membership

Vice President - Marketing

Executive Secretary

Treasurer

Governor

Executive Advisor

Parliamentarian

CEC Coordinator

Elise Dresser, CCLS

Shannon Quigley

Sheryl Boardman

M'Liss Bounds

April Ignaitis, CCLS

Linda Neuman

Rod Cardinale, Jr.

Elena Schneider, CCLS

Vivian Shreve, CCLS





## Code of Ethics

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

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

See what's happening on our social sites:



Place article copy here. Be sure to make the articles short and concise as people tend not to read much more than a couple of paragraphs. Place article copy here.

Santa Clara County Legal Professionals Association, P.O. Box 90509, San Jose, CA 95109



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