



THE ADVANCE SHEET SCCoLPA's News & Events MARCH 2018

Greetings SCCoLPA Members:

Spring is in the air and it's time to look forward to new changes and growth in the coming months. Speaking of growth, our Association continues to grow, and your Executive Committee is busy doing their best to provide you with the most interesting and motivating events each month as possible.

February was a busy month for SCCoLPA! At the beginning of the month, we hosted our first "meet and greet" brunch, where our members were given the opportunity to meet the SCCoLPA Executive Committee and committee chairs and learn about the importance of volunteering and how it benefits both the members and the community. Then it was on to our annual crab feed on February 10, which was another huge success! That was followed by our monthly membership meeting on February 13, where guest speaker Susan Kalra presented the all-important Changes in the Law for 2018 program. Several of us attended San Francisco LPA's first annual crab feed on February 18, in San Francisco, and had a fantastic time - kudos to SFLPA! Then we wrapped up the month by attending LSI's quarterly conference last weekend at Knott's Berry Farm in Southern California. The fact that every single Executive Committee member attended the conference is a testament to the commitment each board member has made to the Association this year, and for that I am most thankful. One of the best things about being part of this amazing Association are the numerous opportunities it provides to its members to contribute to the betterment of the Association and the community, while also expanding their own professional and personal networks.

Here's a look at what's happening in the next few months:

- **March 13, 2018:** March Monthly Membership Meeting - "Conservatorships" with the Social Services Manager of the Santa Clara County Office of the Public Guardian
- **April 14, 2018:** SCCoLPA's 78th Annual Meeting and Installation of Officers. Note that this meeting is being held at Flames on **Saturday**, April 14, 2018, and will be **FREE** to all SCCoLPA members. There will be no monthly meeting on our regularly scheduled second Tuesday of the month.
- **May 8, 2018:** May Monthly Membership Meeting - "Ethics Update" with Alison Buchanan, Esq.

Details for all these events can be found in this issue of *The Advance Sheet*.

Exciting news! We have received several scholarship applications from students in our local community, and we will be introducing the winner of the Marilyn Ott Memorial Scholarship at our Annual Meeting & Installation of Officers on April 14, 2018.

Finally, the nominations for your Officers of SCCoLPA for the 2018-2019 fiscal year are in! We will be holding elections at our March 13 general membership meeting. Please join us at the meeting and congratulate your new officers!

As always, thank you for your support, and please feel free to reach out to me or any of the SCCoLPA Executive Committee members, with questions, suggestions, and feedback. We would love to hear from you!

With very best wishes,

Elise Dresser, CCLS
President



UPCOMING MONTHLY MEETINGS

**Monthly
Membership
Meeting
March 13, 2018**


**Protecting Your
Rights**

Please join us on Saturday, April 14, 2018 at 10:00 a.m. for SCCoLPA's 78th Annual Meeting and Installation of Officers.

Join us at Flames Eatery for a delicious brunch - this event will take the place of our regular Tuesday night monthly meeting.

Join us as the Officers of SCCoLPA's Executive Committee are installed for 2018-2019 by Installing Officer and LSI Vice President Heather Edwards, accompanied by Installing Marshal Janet L. Brewer, Esq.

Additionally, SCCoLPA will be presenting SCCoLPA's annual scholarship award to a very deserving student from the Santa Clara County Community.



**Santa Clara County
Legal Professionals Association**
www.sccolpa.org
PROUDLY PRESENTS

78th Annual Meeting and Installation of Officers

Featuring
Introduction of SCCoLPA Officers & Chairmen 2018-2019
Presentation of SCCoLPA's Annual Scholarship Award Winner
Presentation of the Annual Rod Cardinale, Jr. President's Award

Join us as LSI Vice President Heather Edwards
Installs the 2018-2019 Santa Clara County LPA Executive Board with
Installing Marshal Janet L. Brewer, Esq.

Flames Eatery & Bar
88 S. Fourth Street, San Jose (408) 971-1960
Validated parking at the 4th Street Garage next to restaurant

Saturday, April 14, 2018
Brunch Served: 10:00 a.m.

Price: **FREE** for all SCCoLPA Members **\$30.00** for non-SCCoLPA members
(Price includes program and Flames' Famous Eatery Buffet: selection of fresh juices, sliced fruit, eggs benedict, French toast, country style scrambled eggs, grilled bacon/sausage, breakfast potatoes, assorted pastries, coffee and tea.)

To RSVP email reservations.sccolpa@gmail.com OR register and pay via PayPal/Credit Card on our "Upcoming Events" page at www.sccolpa.org. **NOTE:** Please put "SCCoLPA Reservations" in the title of your email. Make check payable to **SCCoLPA**. Cash or checks accepted at the door. No refunds if reservation is canceled within 24 hours of the event. A \$3 convenience fee will be added for PayPal/credit card electronic payments.

You also won't want to miss the presentation of the annual Rod Cardinale, Jr. President's Award - one of our deserving members will be recognized for his/her outstanding service to SCCoLPA.

We hope you will join us for a fun-filled morning. As a token of thanks for your support, the brunch will be **FREE** for all SCCoLPA members. The price for non-SCCoLPA members will be \$30.

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.

February 2018 Highlights

"Meet Team SCCoLPA" February 3, 2018

On February 3, 2018, Santa Clara County Legal Professionals Association held its first "meet and greet" at Flames Eatery & Bar in downtown San Jose. This was an opportunity for members to meet SCCoLPA's Executive Committee and



Committee Chairs, to learn what we do all year around for the Association, and what it takes to volunteer for a board or chair position. Each officer and chair spoke about their various positions, and encouraged the attendees to "step outside the box" and volunteer for SCCoLPA.



*VP of Membership Shannon Quigley, Executive Advisor Rod Cardinale, Jr.,
Lauren Hull, Veronica Huerta*



Executive Secretary M'Liss Bounds, Susan Husher, President Elise Dresser, CCLS



VP of Membership Shannon Quigley



Parliamentarian Elena Schneider, CCLS and New Member Jessica Urioste

SCCoLPA's 8th Annual Crab Feed February 10, 2018

And another fantastic crab feed is in the books! Santa Clara County Legal Professionals Association held its 8th Annual Crab Feed on February 10, 2018 at the Quinlan Community Center in Cupertino. first membership meeting of the new year on January 9, 2018 at Flames Eatery & Bar in downtown San Jose. Once again, this event was **SOLD OUT** - almost 200 people attended the crab feed,

including all the volunteers who helped make it the best event ever!



Special thanks to Crab Feed Chair Rod Cardinale and the Crab Feed Committee, along with Girl Scout Troop 60114 and Troop Leader Marlene Muraco, Lannie Meadows, our always-popular DJ, and to all those who donated items for our extremely successful silent auction. Kudos to our Ways & Means Chair, April Ignaitis, CCLS, who orchestrated the entire silent auction, from requesting donations to putting all the items together for the auction.

In order for our crab feed to be a success, it takes a village! Led by our fearless Crab Feed Chair, Rod and the Committee worked tirelessly, prepping

and cooking the night before, driving to Fairfield at the crack of dawn to pick up the crab, and spending hours at the community center to make it look awesome!

A heartfelt thanks to everyone - we could not do this every year without your support. We're already looking forward to our 9th Annual Crab Feed next year!



Thanks to Quinlan Community Center for providing such a great venue! We had close to 200 in attendance at the crab feed and everyone had a blast! We served delicious Dungeness crab, salad, pasta featuring Rod's "secret" family pasta sauce, garlic bread and yummy chocolate cake for dessert. Hope to see you all next year!



Pam Stallings, CCLS - Superstar ticket seller!

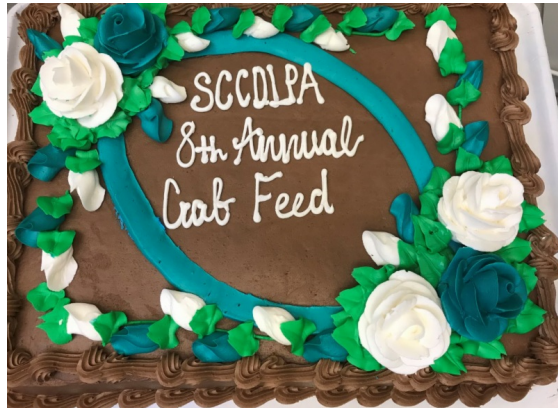


Thanks for supporting and bidding on all our great silent auction items!

Special thanks to all our friends and family who generously donated gift cards, gift baskets, wine, lovely homemade items, and more. Your support is greatly appreciated!



Thank you Girl Scout Troop 60144!

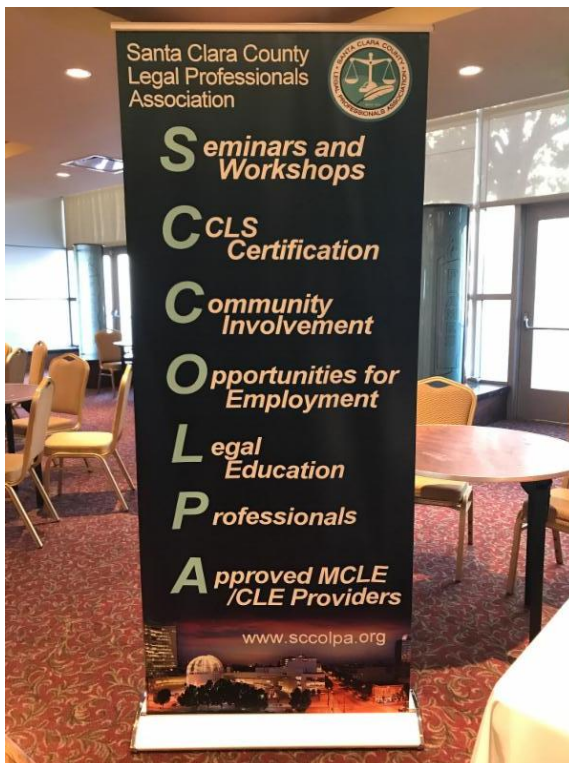


Cake!





Reservations Chair M'Liss Bounds



February Monthly Membership Meeting February 13, 2018

Santa Clara County Legal Professionals Association held its monthly membership meeting on February 13, 2018 at Flames Eatery & Bar in downtown San Jose.

SCCoLPA was pleased and honored to welcome back Susan Kalra as its guest speaker. Susan presented "Changes in the Law for 2018" and covered the important changes in laws, codes, and statutes taking place in civil, family law, and probate.

Vice President of Membership Shannon Quigley introduced Jeanne Smith as SCCoLPA's Member in the Spotlight for February 2018. Jeanne

has been a member of the Association since 2011, and has always been a strong supporter of SCCoLPA. Congratulations Jeanne!



Happy Valentine's Day!



VP of Membership Shannon Quigley initiates new members Jessica Urioste, Madison Corbitt, Melissa Cardinale, and Lori Havener



Lori Havener, Sheryl Boardman, Rod Cardinale, M'Liss Bounds, Susan Husher, Andrea Lorenz



*Gwen Freeman, Shannon Quigley, Jessica Urioste, Jeanne Smith,
Angela Donahue, Shara Bajurin, CCLS*



Guest Speaker Susan Kalra and CEC Coordinator Vivian Shreve, CCLS



Jeanne Smith, SCColPA's Member in the Spotlight for February



Opportunity drawing winner Jessica Urioste and Ways & Means Chair April Ignaitis, CCLS

San Francisco LPA's First Annual Crab Feed February 18, 2018

Members of SCCoLPA had a great time at San Francisco Legal Professionals Association's first annual crab feed, which was held on February 18, 2018 at the Pomeroy Recreational Center in San Francisco. Thanks to President Larry McGrew, Vice President Carol Romo, and Team SFLPA for putting on a great event. Some of us even went home with a couple opportunity drawing prizes!



Tina Cardinale, Elise Dresser, CCLS, Rod Cardinale, Jr., Shannon Quigley, Sheryl Boardman, and Team Aptus Court Reporting



Heading up SFLPA's awesome crab feed: President Larry McGrew and VP Carol Romo.

**LSI Third Quarterly Conference
Knott's Berry Farm, Buena Park, CA**

February 23-25, 2018

~ by Linda Neuman, SCCoLPA Governor

LSI's 3rd Quarterly Conference was held February 23-25, 2018, at the Knott's Berry Farm Hotel in Buena Park, California. The theme for the weekend was "Star Spangled Celebration." Needless to say we saw a lot of red, white and blue throughout the weekend. **I am proud to announce that the ENTIRE Board of Directors for SCCoLPA was in attendance at this Conference!!** Attending and representing SCCoLPA were: (Our Very Own) Rod Cardinale, Jr. LSI Treasurer and SCCoLPA Executive Advisor, (Our Very Own) Elise Dresser, CCLS, CCLS Certifying Board Chairman and SCCoLPA President, (Our Very Own) April Ignaitis, CCLS, CCLS Certifying Board Member, (Newly Appointed CCLS Certifying Board Chairman) and SCCoLPA Treasurer, (Our Very Own) Vivian Shreve, CCLS, CCLS Certifying Board Member and SCCoLPA CEC Coordinator, Shannon Quigley, SCCoLPA Vice President of Membership, Sheryl Boardman, SCCoLPA Vice President of Marketing, M'Liss Bounds, SCCoLPA Executive Secretary, Linda Neuman, SCCoLPA Governor, Elena Schneider, CCLS, SCCoLPA Parliamentarian, and Tressa Jacobson, a member of SCCoLPA.

Excerpts of my Governor's Report can be found in this issue of *The Advance Sheet*. The full report has been posted to SCCoLPA's members' only section of the website.



*Elena Schneider, CCLS, M'Liss Bounds,
Snoopy, Shannon Quigley*



*Governor Linda Neuman and the Knott's Berry
Farm Chicken*



Sheryl Boardman at work at the Compex booth



Vivian Shreve, CCLS, M'Liss Bounds, Sheryl Boardman, Shannon Quigley



Star-spangled banner themed conference!



Elise Dresser, CCLS and April Ignaitis, CCLS



Attending the Governors' Luncheon: LSI Treasurer Rod Cardinale, Jr., Governor-in Training Elena Schneider, CCLS, and Governor Linda Neuman

Time to start the Board of Governors meeting with LSI President Jennifer Page, CCLS, Executive Secretary Lynne Prescott, CCLS, LSI Treasurer Rod Cardinale, Jr., and Executive Advisor Mary Beaudrow, CCLS



The Satin Girls provided musical entertainment at Saturday evening's banquet.



All dressed up with Norbert! Vivian Shreve, CCLS, M'Liss Bounds, Linda Neuman, Shannon Quigley, Sheryl Boardman

UPCOMING EDUCATIONAL WORKSHOP

Spring Quarterly Workshop Thursday, May 3, 2018

Save the date! On Thursday, May 3, 2018, SCCoLPA will present its Spring Quarterly Workshop. The topic will focus on probate and estate planning, pitfalls and how to avoid them. The program will be presented by Janet L. Brewer, of the Law Firm of Janet L. Brewer, in Palo Alto. Further information will be available shortly.



UPCOMING EVENTS SAVE THE DATE!



SAVE THE DATE!
8th Annual Marilyn Ott Memorial BBQ
June 9, 2018

Bring your family and friends and join us for a great day of food and fun! Once again, we invite you to our annual summer barbeque, and in appreciation of your membership in SCCoLPA, the BBQ is FREE to all members! Further details and a flyer will be provided shortly.



Santa Clara County Legal Professionals Association

invites you to

The San Jose Giants vs Inland Empire 66ers

Municipal Stadium, 588 East Alma Ave. San Jose, CA 95112



Saturday, July 28th, 2018

Game Time: 6:00 p.m.

Tickets: \$55 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 21, 2018



Member in the Spotlight - March 2018

~ by Shannon Quigley, Vice President of Membership

Elena K. Schneider, CCLS

Our March Spotlight Member is our very own, Elena Schneider, CCLS. Let me tell you a little bit about her. Elena grew up in the small Southeastern Arizona town of Sierra Vista. She said it was a great place to grow up and it was there that she experienced her first introduction to the law. You see, as a teenager in high school Elena broke the law - yes, that's right - Elena broke a law! She violated the curfew law, as she did not even know her town had a curfew! The town of Sierra Vista does not permit anyone under the age of 16 to be out at night past 10 p.m. Elena's second



brush of the law was when she was rounded up with several other classmates when they caught in the act of underage drinking. What followed became the most memorable moment in her and is likely what shaped her to be the proud rule-follower that she is now. All of her classmates were brought in front of the local judge, Judge Anderson, to plead to the charge of "consumption of alcohol by a minor." Elena said she remembers the judge explaining that you could plead guilty, not guilty, or "no contest." She was curious as to what "no contest" meant...as she had never heard that term! When she asked her mother, she nudged her and her only reply was, "You're pleading guilty!" - which she promptly did. Thank goodness, the judge was lenient and only gave them a small fine and required them to attend a class to learn about the ills of alcohol consumption. That experience definitely molded Elena to follow the straight and narrow - looking back; she said she thinks that really was the beginning of her interest in the legal field.

Elena shared that she has always been very independent, but also very pragmatic. She knew she needed to get a job but she also desired something with room to grow and move up. After a brief stint as an answering service operator, she landed a job with Farmers Insurance, working in their claims department. After 8 years of hard work and mastering every position in the claims office, Elena became the secretary to the Branch Manager. One day she attended a career path seminar at the company's regional office and discovered that Farmers also had in-house counsel litigation legal offices. The next day, she called the local legal office to ask what exactly a legal secretary does. They explained the duties, told her they had an opening, and asked if she would like to come in for an interview. Elena went to the interview later that week and was offered the job! She accepted and thus began her legal career and she has never looked back.

When asked what motivates her, Elena responded that it is her need to feel useful and to know that she is contributing in a positive way. She puts in a hard day's work, and then goes home to relax and enjoy life. Elena is passionate about helping people and teaching them new things and sharing her experience. She likes being the support to her attorneys and co-workers and anticipating her attorney's needs. She feels like she has found the right fit for her skill set and legal work has been extremely enjoyable for her over the years.

What is it like to walk in Elena's shoes for one workday? To start, Elena's workday is anything but typical. She likens it to what Forrest Gump's mom said about life...like a box of chocolates - Elena never knows what she is going to get. It is exactly that variety and fast-paced environment of civil litigation that she really enjoys. Give her a deadline and she will get it done!

For Elena, personally, she said being a member of SCCoLPA has been a positive experience. She has enjoyed volunteering, working with, and getting to know so many wonderful colleagues and friends. Professionally, Elena would say that serving on the board and being more visible in the legal community has been one of the biggest benefits. Her employer has been supportive of her service to the organization and they understand the benefits of being part of a professional association, especially the educational benefits that we receive. In addition to those daily challenges she faces at work, she would say one of the biggest benefits about being a member of SCCoLPA is knowing that there is a vast community of colleagues out there across the state that she can reach out to if she needs help or information or direction, and they are always happy to help. To her, those friendships and connections are priceless.

Please congratulate Elena Schneider, CCLS on being our March Spotlight Member!

The following Governor's report summarizes LSI's Third Quarterly Conference, held February 23-25, 2018 at the Knott's Berry Farm Hotel in Buena Park, California. A full version of my report can be found on the Members' Only section of the website.

On February 23, 2018, the Friday Night Reception was held in the vendor/opportunity drawing area so we were able to eat, catch up with friends, view the vendors' booths, and ponder the many prizes available. With the new LSI Conference schedule in place, Friday night was very relaxed and no one had to rush off before the end of the Reception to attend an educational workshop. The new schedule was greatly appreciated.

The Board of Governors meeting was called to order on Saturday morning, February 24, 2018, at 9:00 a.m. by LSI President Jennifer L. Page, CCLS, Marin County LPA. The Pledge of Allegiance was led by Sean Peterson, President of Fresno County LPA, and the Code of Ethics was read by Tanya Tate, President of San Mateo County, LPA. The inspirational message was given by Kathleen Gorham, President of Desert Palm LPA. Kathleen's message tied in how the red, white and blue colors of this weekend and of being a member of LSI represent personal development, positive attitudes, dedication to work, and family, and how we grow through encouragement of people around us. Next, Sylvia Marsh, President of Orange County LSA introduced the Welcome Speaker, Virginia Vaughn, Mayor of Buena Park. Mayor Vaughn welcomed all in attendance to the fine city of Buena Park and stressed the importance of education in the workplace. She concluded her speech with a letter of thanks to LSI and its members for visiting the city of Buena Park, for supporting the legal field and commended LSI on a wonderful organization that helps with education in the workplace.

President Jennifer introduced the LSI Past Presidents in attendance: Diana E. Estabrook, PLS (1984-1986), Patricia E. Miller, PLS, CCLS (1998-2000), Kay J. Thornburg, (2002-2004), Mary S. Rocca, CCLS (2004-2006), and Mary J. Beaudrow, CCLS (2014-2016). Honorary Member Don Lee was also introduced.

The Minutes of the November 2017 Quarterly Conference Board of Governors Meeting were timely mailed and were approved as corrected.

LSI Treasurer (Our Very Own) Rod Cardinale, Jr. provided a Summary of Revenue & Expenses to the members:

Current Period Actual:

Total Expenses: \$ 34,030

Total Income: \$ 24,254

Income <Deficiency> < \$ 9,777 > Over Expenses

Rod moved that the actions of the Treasurer in paying the routine bills of LSI during the third quarter of the fiscal year 2017-2018 be ratified. The motion was carried.

Nominations & Elections Chair Mary J. Beaudrow, CCLS (LSI Past President 2014-2016) announced that each local association was provided with an official call for nomination of officers of Legal Secretaries, Incorporated and to date the following nominations have been received:

President : Heather Edwards, San Fernando Valley LSA

Vice President: Lynne Prescott, CCLS, Sacramento LSA

Executive Secretary: (Our Very Own) Rod Cardinale, Jr., Santa Clara County LPA

Treasurer: Diane M. Mecca, CP, CBA, Stanislaus County LPA

Karen reported that the PRC has been very busy this last quarter, working on the 2018 revisions for the LPH and the LOPM. The Royalties for the period October 2017

to December 2017: LOPM \$2,342.43 and LPH \$3,945.93, for a total of \$6,288.36. She also reported that the LOPM will no longer be published in the binder format in the future, but instead in a soft-bound book that will be replaced yearly. Karen acknowledged her PRC Committee: Linda Lane, CCLS, Lisa De La O, Judy Johns, CCLS, Betty Thomas, Pamela Schuld, CCLS and Norma Marquez and thanked them for all their hard work this quarter.

Editor of The Legal Secretary magazine Barbara Barregar announced the nine associations responsible for submitting an article for the magazine by the March 1, 2018 deadline, and (Our Very Own) SCCoLPA is on the list. (Just to let you know, we submitted an article before the deadline. You might want to give the May issue a look see.)

Legal Specialization Section Coordinator Dawn Forgeur, CCLS, reported that it is her hope that the updated seminar schedule for quarterly conferences will make it easier for more people to attend the educational classes on Saturday, offering a full day of education for an affordable price. She announced the upcoming webinars: March 8th: Ethics for the Legal Professional; April 5th: Subpoenas (#2) Deposition Appearance Subpoenas for California including Trial Subpoenas; April 26th: Subpoenas (#3) Federal Court Subpoenas and an online class from March 19-April 30: Overview of California State Court Discovery.

The Board of Governors meeting was recessed at 10:22 a.m. The morning LSS workshops were: The Civil Litigation LSS Section presented "Motions from Staff's Perspective" and the Criminal /Family Law LSS Section presented "50-50 Custody Orders and Related Issues."

Governors' Luncheon:

I attended the Governor's Luncheon and am excited to report that Elena Schneider, CCLS attended as a "Governor in Training." We reviewed the Executive Committee Resume, and I wish to share the following highlights:

1. The Law Office Procedure Manual will be published as a softbound volume, with revisions once or twice a year.
2. LSI Legal Procedure blog posts: The LSI Legal Procedures Chairman will try to make weekly blog posts instead of posting infrequently.
3. Increase in number of webinars to be offered to members.
4. Further discussion regarding the increase of LSI dues again. Following an explanation from the current LSI Treasurer (Our Very Own) Rod Cardinale, Jr., it seemed that the Governors had a better understanding why LSI needs to find an avenue for more income or the organization is on the road to expiration.

The afternoon session of the Board of Governors reconvened at 1:59 p.m. LSI Executive Secretary Lynne Prescott called the roll. 26 governors were present, constituting a quorum.

The governors voted on four proposed bylaw amendments and one Executive Committee Recommendation. The summary of the voting can be found in my full report which has been posted to the website.

The 2018 Annual Conference Co-Chairs, Annette Davis and Mae Chester, CCLS, reported that the Annual Conference will be held at the Garland Hotel in North Hollywood, May 17-20, 2018. The theme for the weekend is "Teamwork - Everything is Awesome When You're Part of a Team."

Under New Business, bids for future conferences were announced. There was only

one bid each for hosting the November 2019 Conference, May 2020 Annual Conference, and August 2020 Conference so the bids were accepted. The November 2019 Conference will be held at the San Francisco Hilton in San Francisco, CA. The date will be 11/21 - 11/24/ 2019, projected scrip ticket will be \$185.00 and room rates are projected at \$165.00 (with the room rates through Thanksgiving). The May 2020 Annual Conference will be held at the Hilton in Sacramento, CA. The date will be 5/7-5/10/2020, projected scrip ticket will be \$149.00 and the room rates are projected at \$138.00. There was a motion to suspend LSI Standing Rule 3.4(a) which says tentative dates for Annual Conference, shall be after May 10, but Sacramento LSA's tentative date for Annual Conference is May 7-10. The Motion passed. The August 2020 Conference will be held at the Stockton Hilton in Stockton, CA. The date will be 8/21-8/23/2020, projected scrip ticket will be \$149.00 and the room rates are projected at \$135.00. Bids for the February 2020 Conference are extended to April 30, 2018.

President Jennifer Page, CCLS, announced the following appointments.

(Our Very Own) April Ignaitis, CCLS has been appointed as CCLS Certifying Board Chair.

The Board of Governors meeting was recessed at 2:59 p.m. The afternoon LSS workshops were: The Specialty Law LSS Section presented "The Changing Role of Legal Secretaries in Insurance Defense Litigation - How to Adapt and Become an Indispensable Team Member;" the Law Office Administration LSS Section presented "Employment Law Updates for 2018;" the Probate/Estate Planning LSS Section presented "Elder Law - Conservatorships;" and the Federal Law LSS Section presented "Appeals."

We all enjoyed a lovely evening at the Banquet. The food was good and we were entertained by the lovely singing voices of the Satin Girls. But the absolute highlight of the evening was when I was able to sit at the LSI Past President's Reserved Table. I have been thinking about how wonderful it would be able to sit and get to know some special ladies who "have been there, done that." And I must say it was WONDERFUL!! What an awesome LSI memory.



On Sunday morning, Brunch Chairman (Our Very Good Friend) Heather Nowak introduced the Guest Speaker, no other than her sister Cristi Czuleger, Esq. Cristi enlightened us on her long and hard journey to becoming a Workers' Compensation Attorney. Cristi concluded her speech by telling the members you are NEVER too old to pursue your dream and working for only 20 minutes a day will help you achieve that dream.

President Jennifer L. Page, CCLS called the meeting to order at 9:53 a.m. and immediately dispensed with the roll call. With no further business to come before the Governors, the Board of Governors Meeting was adjourned at 10:05 a.m.

The 3rd Quarterly Conference of LSI was adjourned to the Pre-Governors Meeting at the 84th Annual Conference on May 17-20, 2018 to be held at the Garland Hotel in North Hollywood, California hosted by San Fernando Valley LSA.

Respectfully submitted,
Linda Neuman
The PROUD Governor of SCCoLPA

Order in the Court

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

In a Legal Proceeding, What is *Immunity*?



Immunity is the granting of special legal privileges that allow a person or entity to be exempt from performing duties the law requires everyone else to perform (e.g., pay taxes, serve on a jury). As it relates to criminal legal proceedings, immunity from prosecution is granted in some grand jury investigations to witnesses who may themselves be guilty of the criminal activities under scrutiny. Immunity, if used strategically, is a persuasive and effective way to get key witnesses in possession of damning firsthand testimony to testify. As such, it has become the cornerstone of prosecutions against organized crime syndicates, granting immunity to the underlings in order that the kingpins are prosecuted. Though it has evolved through two centuries of common law cases, the "immunity statute" grew out of the constitutional right against self-incrimination guaranteed by the Fifth Amendment.

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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, 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).

### CORPORATIONS

1. A corporation begins to exist upon the filing of its \_\_\_\_\_ with the \_\_\_\_\_.
2. TRUE/FALSE: A corporation may be formed by one or more corporations.
3. What is the difference between a domestic and foreign corporation?
4. What are the two basic types of corporation?
5. What are the three major categories of non-profit corporations?
6. There are two words that, if used in the corporate name, may violate federal law. Can you name the two words?
7. If the corporate name includes an individual's name, what word or words must also be included in the name.
8. The rules for conducting the internal affairs of the corporation are called what \_\_\_\_\_.
9. Who owns the corporation?
10. Who runs the day-to-day operations of the corporation?
11. Who manages the business and affairs of the corporation?
12. When must the corporation's Statement of Information be filed ?
13. Where is the Statement of Information filed?
14. How much notice do you provide for a Special Meeting of Board of Directors?
15. BONUS: There are 6 minimum requirements that must be included in a domestic stock corporation's Articles of Incorporation. Can you name 4 of them?

### ANSWER KEY:

1. Articles of Incorporation with Secretary of State. (LOPM L-9)
2. True - or by one or more natural persons, partnerships, associations, or trusts (LOPM L-9)



3. A domestic corporation is any corporation formed under the laws of the State of California; A foreign corporation is any corporation formed under the laws of a state or jurisdiction other than California (LOPM L-10)
  4. Stock and Non-profit (LOPM L-10)
  5. Non-profit Mutual benefit; Non-profit Public Benefit; and Non-profit Religious (LOPM L-10)
  6. Olympic and Olympiad (LOPM L-12)
  7. Corporation, incorporated, or company - to show that the name is that of a corporation, and not just that of the individual alone. (LOPM L-12)
  8. Bylaws (LOPM L-15)
  9. Shareholders (LOPM L-17)
  10. Officers (LOPM L-17)
  11. Directors (LOPM L-17)
  12. Within 90 days of filing of original Articles of Incorporation; and every two years thereafter (LOPM L-17)
  13. Secretary of State (LOPM L-17)
  14. Four days' notice by mails or 48 hours' notice delivered personally or by phone, voicemail, fax, email or other electronic means (LOPM L-23)
  15.
    - A. Name of corporation
    - B. Purpose of the corporation
    - C. Structure of the shares (class and type, privileges and restrictions, etc.)
    - D. Number of shares authorized
    - E. Appointment, including name and address in California, of an agent for service of process
    - F. Signature of each director of the corporation named in the Articles, OR each incorporator (if no directors have been named). (LOPM L-13)
-

## 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, March 17, 2018 ☐ Saturday, September 15, 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 information 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: \_\_\_\_\_  
(name and address)

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 2018

## Legal Procedures - The Latest Updates

### SANTA CLARA COUNTY SUPERIOR COURT E-FILING UPDATE

E-filing for all Civil cases will be mandatory starting **Tuesday, February 13, 2018**.

E-filing for Family, Complex Civil, Unlawful Detainer, Civil Harassment, Small Claims, and Probate cases is now mandatory.

The Court has published local rules regarding electronic filing. Click [here](#) for a copy of the latest local rules.

For more information about the e-filing rules, go to the Santa Clara County Superior



## CHANGES TO CALIFORNIA RULES:

Changes to the California Code of Civil Procedure and the California Rules of Court will take effect January, 1, 2018. Among other things, there will be significant changes to CCP section 1010.6 regarding electronic filing and electronic service.

List of new and revised Judicial Council Forms

<http://www.courts.ca.gov/documents/00PublishersList.pdf>

## UNITED STATES DISTRICT COURT - NORTHERN DISTRICT OF CALIFORNIA

Northern District's Caseload Rebalancing Program Begins March 1, 2018

Starting March 1, 2018, the Court will undertake a pilot program in order to rebalance caseloads between district judges in each of its divisions. As a result, a small percentage of civil cases normally venued in San Jose will be assigned to district judges in San Francisco or Oakland without regard to the venue provisions in Civil Local Rule 3-2 (Commencement and Assignment of Action) and General Order 44-Assignment Plan. The court will evaluate the effectiveness of this program in one year.

---

## 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:** Save May 3, 2018 on your calendar! SCCoLPA will present an estate planning seminar that will highlight pitfalls of the practice and how to avoid them. Further information will be provided shortly. CLE 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.



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## 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 _____                  | *Title: <i>[Examples at bottom of page]</i> _____   |
| Residence Address _____              | Business Name _____                                 |
| Residence City and Zip Code _____    | Business Address _____                              |
| Residence Telephone Number _____     | Business City/State/Zip Code _____                  |
| Residence Fax Number _____           | Business Telephone Number/Business Fax Number _____ |
| E-Mail Address (Home) _____          | E-Mail Address (Work) _____                         |
| PREFERRED E-MAIL: <i>(Check One)</i> | Field of Law _____                                  |
| Residence: _____ Business: _____     |                                                     |
| Birthdate: _____                     | Year I became a member of SCCoLPA: _____            |
| Month/ Day                           | 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; (Sr.) Paralegal; Legal Assistant; Notary Public; Office Manager; etc.]*



## 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)*  
☐ 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

- Active Member:** 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.
- Associate Member:** 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.  
  
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.  
  
Associate Membership as defined in the By-laws shall include any student enrolled in a certified educational program recognized by this Association.
- Retired Member:** Age 62, retired from employment, wishing to retain active status:  
  
A. Less than 10 years in SCCoLPA, payment of \$20.00 LSI per capita taxes.  
B. More than 10 years in SCCoLPA, no payment.
- Disabled Member:** Must present certification of permanent disability and request to retain active status:  
  
A. Less than 10 years in SCCoLPA, payment of \$20.00 LSI per capita taxes.  
B. More than 10 years in SCCoLPA, no payment.
- Life Member:** 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.
- Delinquent Dues:** 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.  
  
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.

<sup>1</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).

Application/Renewal Form 2017-2018

## 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!



## Happy Birthday to Our Members!

Happy Birthday to the following SCCoLPA members:

Rachel Palmisano - March 1  
Luz-Marie Ramirez - March 4  
Carmen Larsen - March 5  
Sarah Vogel - March 10  
Nicole Gauthier - March 16  
Rod Cardinale, Jr. - March 17  
Lorianne Harris - March 23  
Pamela Salsgiver - March 27  
Pauline Lopez - March 28  
Richard Staskus - March 28



## LOCAL ASSOCIATION and LSI EVENTS



# LSI

*Educating California's  
Legal Support Professionals*





Alameda County Legal Secretaries Association  
*A Member of Legal Secretaries, Incorporated*

Proudly Presents:

**BAY AREA DAY IN COURT**  
**A View From The Bench: How You Can Help Your**  
**Attorneys Make the Best Impression!**

Wednesday – March 14, 2018  
5:15 p.m. to 8:00 p.m.  
Meet your Vendors and Cocktail Reception 5:15  
Dinner 5:45

Meyers Nave  
555 12<sup>th</sup> Street, 15<sup>th</sup> Floor  
Oakland, CA 94607

**Speakers: Hon. Benjamin Reyes, Judge Contra Costa Superior Court**  
**Hon. Kimberly Colwell, Judge Alameda Superior Court**

**COST: \$40 before March 1, 2018 -- \$45 after March 1, 2018**  
**Please make checks payable to "ACLSA"**  
**Cancellations must be made 72 hours in advance for a refund.**  
**(No shows will be billed.)**

-----  
PLEASE MAIL OR EMAIL YOUR REGISTRATION FORM AND MAIL YOUR CHECK PAYABLE TO "ACLSA"

Mailing Address: Lydia Smith, 1835 Elkwood Drive, Concord, CA 94519.  
For Credit Card Payments - Venmo Lydia-Smith-18

CONTACT: Cyndee Saucedo, ACLSA DIC Chair  
[CSaucedo@meyersnave.com](mailto:CSaucedo@meyersnave.com) Phone: 510-808-2141

Your Name: \_\_\_\_\_ CCLS? Yes \_\_\_ No \_\_\_

Address \_\_\_\_\_ City: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Meal will be buffet style:  
Menu still in Progress

Food Allergies? \_\_\_\_\_

ACLSA, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California and Certified Legal Secretary credit in the amount of at least 1.0 hours.

Legal Specialization Sections  
Lunch & Learn Webinar



## ETHICS FOR THE LEGAL PROFESSIONAL

Presented By: Jeanine DeBacker, Esq.

March 8, 2018, 12-1 pm

ONLINE REGISTRATION AND PAYMENT AVAILABLE AT [WWW.LSI.ORG](http://WWW.LSI.ORG)

| All Legal Specialization<br>Section Members                           | LSI / Local Association<br>Member                                     | Non-LSI Member or<br>Attorney                                         |
|-----------------------------------------------------------------------|-----------------------------------------------------------------------|-----------------------------------------------------------------------|
| Free with Reservation<br>Registration will close on<br>March 1, 2018. | \$10 with Reservation<br>Registration will close on<br>March 1, 2018. | \$15 with Reservation<br>Registration will close on<br>March 1, 2018. |
| <input type="checkbox"/>                                              | <input type="checkbox"/>                                              | <input type="checkbox"/>                                              |

Name: \_\_\_\_\_ E-mail: \_\_\_\_\_

Phone: \_\_\_\_\_ Local LSI Association: \_\_\_\_\_ (No abbreviations.)

Questions for the Speaker: \_\_\_\_\_

CLE Certificate Requested: ☐ CCLS -- ☐ Paralegal -- ☐ Attorney [Bar No. \_\_\_\_\_]  
Payment: ☐ Check (made payable to LSI) ☐ Credit Card or PayPal Available at [www.lsi.org](http://www.lsi.org)

**Send completed form and payment (check made out to LSI) to:**  
Bence M. Evans, CCLS, Webinar Section Leader, c/o Dentons US LLP,  
4655 Executive Dr., Suite 700, San Diego, CA 92121; Email: [lswebinar@gmail.com](mailto:lswebinar@gmail.com)

*The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that this seminar has been approved for minimum CLE credit of 1 hour by the State Bar of California.*

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



# 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 Steel River LLP  
500 Capital Mall, Ste. 1600  
Sacramento, CA 95814

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





# LSI

*Educating California's  
Legal Support Professionals*

## OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY

LSI will be offering an online class on an Overview of California State Court Discovery. This class will be a six-week, work-at-your-own-pace online session commencing March 19 and ending April 30, 2018. During the classes, the following topics will be covered:

Interrogatories  
Demand for Production of Documents  
Requests for Admissions  
Depositions

Demand for Physical Examinations  
Deposition Subpoenas  
Discovery Timelines and Service  
Verifications

### CLASS SESSION OPENS MONDAY, MARCH 19, 2018

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 content of this class is designed for legal secretaries and those studying for the California Certified Legal Secretary examination.

The cost of the class is \$30 for LSI members/\$50 for non-LSI members. Each individual must register separately. Upon completion of the class, students will receive a certificate of completion from LSI.

### OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY CLASS REGISTRATION

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

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

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

\$30 LSI Member \_\_\_\_\_ Association: \_\_\_\_\_ LSA/LPA  
(No abbreviations please; status is verified)

\$50 Non-LSI Member \_\_\_\_\_

Payment: Check # \_\_\_\_\_ (made payable to LSI)

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

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

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

Email registration form NO LATER THAN March 14, 2018, to [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. For further information or inquiries, email [training@lsi.org](mailto:training@lsi.org). No refunds after March 19, 2018. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study.

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

# INDISPENSABLE



## 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 what to do, and when and how to do it. The *Legal Professional's Handbook* provides you with the answers ...just as it has for over 75 years! Each chapter contains detailed practice forms and step-by-step instructions covering every major area of California law practice. The Handbook is an invaluable resource to add to your entire reference library!

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.*

## 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. 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

Nonmembers Price.....\$261

*Price includes shipping. Add applicable sales tax.*

*This title is updated bi-annually for subscribers by replacement pages.*

**Buy both LSI books together and get a discount!**

Combo price for both books.....\$514.50

*Price includes shipping. Add applicable sales tax.*

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## 2018 NINTH CIRCUIT CIVICS CONTEST

**The 14th Amendment**  
- 150 Years after Ratification -

**What Does  
Equal Protection  
Mean to  
Students?**



For more information visit:  
<http://www.ca9.uscourts.gov/civicscontest>



An essay and video contest for high school students in the western United States and Pacific Islands. Entries accepted beginning February 1, 2018. Deadline for entries is **April 1, 2018**. Contest rules, entry instructions and more information will be available January 2, 2018, at

<http://www.ca9.uscourts.gov/civicscontest>



CASH PRIZES for Winners of the Essay and Video Competitions

**1<sup>st</sup> place: \$2,000\* 2<sup>nd</sup> place: \$1,000 3<sup>rd</sup> place: \$500**

\*Plus! Travel and accommodations to attend the 2018 Ninth Circuit Judicial Conference in Anaheim, California

## 150 Years after Ratification of the 14th Amendment: What Does Equal Protection Mean to Students?

Ratified on July 9, 1868, the 14th Amendment to the Constitution provides, in part, that no state can "deny to any person within its jurisdiction the equal protection of the laws." Over the past 150 years, Congress and the courts have applied this "Equal Protection Clause" to our right to equal educational opportunities. Noteworthy court decisions include:

- Mendez v. Westminster School District, decided in 1947, in which the placement of Mexican-American students into separate "Mexican schools" was found to violate their rights under the Equal Protection Clause;
- Brown v. Board of Education of Topeka, decided in 1954, in which the placement of white and African-American students in different public schools on the basis of race was also found to violate the Equal Protection Clause;
- Lau v. Nichols, decided in 1974, in which the lack of supplemental language instruction in public school for students with limited English proficiency was found to have violated the Civil Rights Act of 1964;
- Regents of the University of California v. Bakke, decided in 1978, and Grutter v. Bollinger and Gratz v. Bollinger, decided in 2003, in which certain affirmative action policies used by two universities to increase minority enrollment were upheld while others were struck down; and
- Endrew F. v. Douglas County School District, decided in 2017, in which public schools were required, under the Individuals with Disabilities Education Act, to provide disabled students with opportunities to make meaningful, "appropriately ambitious" progress, such as grade-level advancement.



*Federal court decisions ended the practice of having segregated schools for Mexican-American and African-American students.*

Congress applied the Equal Protection Clause to education by enacting laws governing state school programs or activities:

- Title VI of the Civil Rights Act of 1964, which prohibits exclusion of a student based solely on race, color or national origin;
- Title IX of the Civil Rights Act, enacted in 1972, which prohibits exclusion of a student solely on the basis of sex;
- The Rehabilitation Act of 1973, which prohibits exclusion of a student based solely on the basis of a disability; and
- The Individuals with Disabilities Education Act of 1990, which provides protections and educational opportunities for students with disabilities.

### The prompt for the 2018 Ninth Circuit Civics Contest is "What does equal protection mean to students?"

Students should consider how the Equal Protection Clause applies in high schools, colleges and graduate schools, whether in admissions, classrooms or on athletic fields. Individual students can express their thoughts and ideas in an essay of between 500 and 1,000 words. Individuals and teams of up to three students can produce a 3-5 minute video on the theme. A student may submit both an essay and video. A student may submit only one essay and be involved in the production of only one video.

The essay or video should: 1) Demonstrate an understanding of the historical background of the Equal Protection Clause; 2) Explain the constitutional powers and rights relevant to the court cases and laws mentioned above; and 3) Discuss the important role of the Judicial Branch in preserving the rights of Americans to equal education.

The 2018 Ninth Circuit Civics Contest is open to high school students in nine western states and two Pacific island jurisdictions. Students from public, private, parochial and charter schools and home-schooled students of equivalent grade status may enter.



The U.S. District Court for the Northern District of California and the Northern California Chapter of the Federal Bar Association will conduct preliminary judging for the district-level competition. Finalists in both the essay and the video competitions at the district level will receive cash awards and advance to compete in the Circuit-wide contest. To be eligible to compete in the local contest, students must reside in one of the these counties: Alameda, Contra Costa, Del Norte, Humboldt, Lake, Marin, Mendocino, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, and Sonoma.

More information on the local contest will be available January 2, 2018, at [www.ca9.uscourts.gov/civicscontest](http://www.ca9.uscourts.gov/civicscontest). If you have questions about the local contest, please contact **Kimberly McCoy** at [community@cand.uscourts.gov](mailto:community@cand.uscourts.gov) / (415) 522-2045.

# Thanks For Your Support!

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GET STARTED

TRUSTPILOT





This month, we're featuring an article from One Legal, a longtime supporter of Santa Clara County Legal Professionals Association. Click on the link below to take you to the article "5 Tips for Studying For a Paralegal Certification WHILE Working Full Time."

[Click here for article](#)

*This article was originally posted at [www.onelegal.com](http://www.onelegal.com) and is shared here with full permission from the author.*

One Legal is an all-in-one solution for physical and electronic court filing, service of process, court research and retrieval, and more. Visit the One Legal blog for other industry insights, legal tech tips, and document-related how-tos.



## Make the most of your pro bono budget



### Supporting Your Commitment to Pro Bono

We admire law firms that have an institutional, firm-wide commitment to provide pro bono legal services to low-income and disadvantaged individuals and families.

To help firms honor this commitment, Esquire is proud to announce a new Pro Bono Court Reporting program that enables firms to make their pro bono dollars go further.

Esquire is committed to social justice and to supporting our clients in their pro bono initiatives. We understand the challenge law firms face in stretching their pro bono budgets to provide representation to pro bono clients and cases.

As part of our commitment to ensure that all individuals have equal access to justice, Esquire has created a Pro Bono Court Reporting Program that enables law firms to save 50% off the O&I page rate on their pro bono depositions.

Leveraging new remote deposition technology is an additional way you can make the most of your pro bono budget. Esquire's Remote Deposition Solutions provide a reliable, easy way to attend depositions or depose witnesses in remote locations without the costs of travel.

#### Make the most of your pro bono budget

Save 50% off the O&I page rate on all your pro bono depositions with Esquire's Pro Bono Court Reporting Program.

#### About Esquire Deposition Solutions

Esquire, a national provider of deposition solutions, helps law firms, insurance companies, and corporate legal departments get it right every time. Continually rethinking how depositions have always been done, we provide personal, precise, worry-free deposition services supported by innovative technology solutions. To learn more, visit: [www.esquiresolutions.com](http://www.esquiresolutions.com).

Please contact us at [probono@esquiresolutions.com](mailto:probono@esquiresolutions.com) to learn more about our Pro Bono Court Reporting Program.



## 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).

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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                   | Elise Dresser, CCLS   |
| Vice President - Membership | Shannon Quigley       |
| Vice President - Marketing  | Sheryl Boardman       |
| Executive Secretary         | M'Liss Bounds         |
| Treasurer                   | April Ignaitis, CCLS  |
| Governor                    | Linda Neuman          |
| Executive Advisor           | Rod Cardinale, Jr.    |
| Parliamentarian             | Elena Schneider, CCLS |
| CEC Coordinator             | Vivian Shreve, CCLS   |



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## 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

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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.