



## THE ADVANCE SHEET

### SCCoLPA's News & Events

### September 2017

Greetings SCCoLPA Members:

I hope you all had a fantastic summer! It feels like time keeps flying by quickly, which indicates to me that now is a good time to slow things down a bit and take the time to relax, set aside time for family and friends, and create memories to cherish.

I hope that everyone had a chance to travel this summer. I'm not talking about a trip to the beach, river, or mountains, but rather I'm talking about a different type of travel, one where you leave the comfort of your routine life. A journey outside of the comfort zone, away from the familiar and the secure, to try something new. Experiencing something different allows us to challenge ourselves and grow. In this issue of The Advance Sheet, you'll read about our very own Rod Cardinale, Jr.'s foray outside the box, and the important decisions he made along the way. You'll also learn more about what each SCCoLPA board member does in a typical month - maybe this is something you might want to think about trying out someday!

I know it's not easy for everyone to take a huge leap out of their comfort zones, but start with something small like taking a small step and attending one of our monthly dinner meetings, and meeting and talking with other members who work in the same field as you. I think you will like it.

I'd like to send out a BIG "Thank You" to all of our fabulous member volunteers. We couldn't do what we do without you. We appreciate and are thankful for your time and efforts to help make SCCoLPA the successful association that it is.

And to all our members, thank you all for your continued support of our great association. Please feel free to reach out to me or any of our board members or chairmen if you would like to become more involved now or in the future.

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](mailto:endresser@gmail.com) for more information.

Finally, as we celebrate Labor Day this year, let's not forget to send our thoughts and prayers to the residents of Texas and the brave emergency personnel who are helping in the relief effort after the devastating impact of Hurricane Harvey. Please check the American Red Cross website and related social media pages in the coming days for ways you can help in the relief effort.

With very best wishes,

Elise Dresser, CCLS  
President

## UPCOMING MONTHLY MEETINGS

### 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 Diane Andreoli from One Legal will provide you with the latest updates from the court, and get you ready with everything you need to know in order to prepare your law firm for e-filing.

Register and pay via PayPal at [www.sccolpa.org](http://www.sccolpa.org), or RSVP via email at [reservations.sccolpa@gmail.com](mailto: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  
**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.

Register and pay via PayPal on our "Upcoming Events" page at [www.sccolpa.org](http://www.sccolpa.org), or RSVP via email at [reservations.sccolpa@gmail.com](mailto:reservations.sccolpa@gmail.com). **NOTE:** Please put SCLCPA Reservation in the title of your email. Make phone inquiries to "SCLCPA". Cash or checks accepted at the door.

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

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

**Flames Eatery & Bar**  
48 S. Fourth Street, San Jose, CA 95113  
408.621-1990 • valet parking at the 4th Street parking garage.

**COST**  
\$35.00 (dinner, dessert & CCLS credit)  
\$20.00 (CCLS credit, no dinner)  
Free (no dinner or CCLS credit)

**UPCOMING EVENTS**  
July 11, 2017 July Monthly Membership Meeting - "Setting a Job - From Resume to Interview"  
July 20, 2017 SCLCPA's 1<sup>st</sup> Annual Business Night  
August 1, 2017 San Jose Giants game at Municipal Stadium, San Jose

This activity has been approved for minimum continuing legal education credit by the State Bar of California to the amount of 0.50 hours, of which 0.25 hours will apply to legal ethics, law practice management, prevention, detection, and treatment of substance abuse and emotional distress, or administration of law. SCLCPA certifies that this activity contains no fee-for-service for expert education or advice provided by the rules and regulations of the State Bar of California governing minimum continuing legal education. CCLS credit will be offered to the amount of 0.25 hours.

### Monthly Membership Meeting



Santa Clara County Legal Professionals Association  
**October 2017 Dinner Meeting**

**ANNUAL DAY IN COURT  
and  
BOSSES' NIGHT**

## Meeting October 10, 2017

### Annual Day in Court and Bosses' Night

SCCoLPA is honored and proud to welcome The Honorable Adrienne M. Grover, Associate Justice of the State of California Sixth District Court of Appeals to its October 10, 2017 general membership meeting. Justice Grover will discuss the differences between being on the Superior and Appellate court benches, and what types of cases are heard by the Appellate Division.

Please also join us as we present SCCoLPA's Boss of the Year Award to a well-deserving boss! Information about nominating your boss will be sent to all members shortly. If your boss is selected as Boss of the Year, you will receive a \$50 gift card!

Register and pay via PayPal at [www.sccolpa.org](http://www.sccolpa.org), or RSVP via email at [reservations.sccolpa@gmail.com](mailto:reservations.sccolpa@gmail.com). Cash or checks accepted at the door.  
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**Santa Clara County Legal Professionals Association**  
**October 2017 Dinner Meeting**

**ANNUAL DAY IN COURT and BOSSES' NIGHT**

**"An Overview of the California Court of Appeals"**

**Special Guest Speaker: Adrienne M. Grover**  
Associate Justice, State of California Sixth District Court of Appeals

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Please also join us as we present SCCoLPA's Boss of the Year Award to a well-deserving boss!

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**Tuesday, October 10, 2017**

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

**Flamers Eatery & Bar**  
88 S. Fourth Street, San Jose, CA 95113  
(408) 971-1982  
\* validated parking at the adjoining 4<sup>th</sup> Street Garage.

**COST**  
\$30.00 (dinner, dessert & CLE credit)  
\$20.00 (CLE credit, no dinner)  
Free (no dinner or CLE credit)

**UPCOMING EVENTS**

August 5, 2017 Annual Summer Beach BBQ and BBQ - Municipal Stadium, San Jose  
August 24, 2017 SCCoLPA Quarterly Workshop - "Navigating & Managing E-Discovery in the Law Office"  
September 12, 2017 Monthly Membership Meeting - E-Filing in Santa Clara County - An Update

## Monthly Membership Meeting November 14, 2017

### E-filing in the California Court of Appeals and California Supreme Court

Did you know that most cases are filed electronically these days? In the Court of Appeal and Supreme Court of California, virtually all documents must be filed electronically. There are special rules pertaining to electronic court filings, including using the correct software. How do you register for

**Santa Clara County Legal Professionals Association**  
**November 2017 Dinner Meeting**

**E-FILING**  
California Court of Appeal & California Supreme Court

**Guest Speaker: Danny Potter**  
Clerk/Administrator of the Sixth District Court of Appeals

Did you know that most cases are filed electronically these days? In the Court of Appeal and Supreme Court of California, virtually all documents must be filed electronically. There are special rules pertaining to electronic court filings, including using the correct software. How do you register for electronic case filing? Before you get started with your filings, learn some important tips to help you file your pleadings correctly.

Join us as our special guest speaker, Danny Potter, Clerk/Administrator of the Sixth District Court of Appeals in San Jose, will answer your questions and put you at ease when it's time to file these all important documents.

Register and pay via PayPal on our "Upcoming Events" page at [www.sccolpa.org](http://www.sccolpa.org), or RSVP via email at [reservations.sccolpa@gmail.com](mailto:reservations.sccolpa@gmail.com). NOTE: Please put "SCCoLPA November" in the title of your email. Make checks payable to "SCCoLPA." 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 payments.

**Tuesday, November 14, 2017**

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

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88 S. Fourth Street, San Jose, CA 95113  
(408) 971-1982  
\* validated parking at the 4<sup>th</sup> Street Garage.

**COST**  
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**UPCOMING EVENTS**

September 12, 2017 SCCoLPA Monthly Meeting - "E-Filing Updates - Santa Clara County"  
October 10, 2017 SCCoLPA Monthly Meeting - "Annual Day in Court and Bosses' Night"  
November 14, 2017 SCCoLPA Monthly Meeting - "E-Filing in the Court of Appeal and Supreme Court"

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UPCOMING EVENTS	
September 13, 2017	SCCoLPA Monthly Meeting - "e-Filing Update - Santa Clara County"
October 10, 2017	SCCoLPA Monthly Meeting - "Annual Day in Court and Reunion Night"
November 14, 2017	SCCoLPA Monthly Meeting - "e-Filing in the Court of Appeal and Supreme Court"

## August 2017 Highlights



### August Monthly Membership Meeting August 8, 2017

Santa Clara County Legal Professionals Association held its July membership meeting on August 8, 2017 at Flames Eatery & Bar in downtown San Jose, and was pleased to have Serena Miller, Esq. present "Polishing Your Professional Image." Ms. Miller gave our members some very valuable and important tips on how best to present yourself in the workplace and how to deal with everyday situations at work.

SCCoLPA also honored Susan Husher as its Member in the Spotlight for July. Congratulations Susan! We are honored and proud to have you as a member of our association. Thank you

for being a great member of SCCoLPA!





Programs Chair Irma MacKay and Guest Speaker Serena Miller, Esq.



Member in the Spotlight Susan Husher



SCCoLPA's newest members, Andrea Lorenz and Carmen Larsen





Luz Marie Ramirez and April Ignaitis, CCLS



Good friends and co-workers Elena Schneider, CCLS and Carmen Larsen





Mark Dresser, meet Mark Dresser!

**SCCoLPA's SUMMER BASEBALL & BBQ NIGHT**  
**August 5, 2017**

SCCoLPA members, family, and friends had a great night at the ballgame on August 5, 2017! Thanks to all who joined us at Municipal Stadium as we watched the San Jose Giants play the Inland Empire 66ers, and enjoyed a delicious BBQ and fireworks show as well! Special thanks to member Carol Karwatt, who donated a slew of great opportunity drawing prizes - and to Los Angeles LSA President Rita Burnett, CCLS, who flew all the way up north from LA to join us for the evening! Rita was also the lucky winner of four San Francisco Giants tickets - congratulations!



A great turnout for our summer baseball game!





Elena Schneider, CCLS and Shannon Quigley enjoying the sunshine



Thanks Andrea Wince for showing off SCCoLPA's great tote bags!





Anthony Cardinale showing off to Dad Rod the FOUR foul balls he caught!



The San Jose Giants mascot posing with the group!

## SCCoLPA Quarterly Workshop Navigating & Managing E-Discovery in the Law Office August 24, 2017

SCCoLPA was pleased to present its summer quarterly workshop on August 24, 2017, "Navigating & Managing E-Discovery in the Law Office." We were pleased to have four extremely experienced experts in the field present a very informative program to the attendees: John Del Piero, VP of Discovia; Derek Duarte, President of Blackstone Discovery; Neda Shakoori, Esq., Senior Associate at McManis Faulkner; and Larry Wilson, E-Discovery Manager at Wilson Sonsini Goodrich & Rosati. The panel gave advice on how to build and maintain better e-discovery practices in the law office, and answered questions from the attendees. Thanks to all who helped make this program a great success!



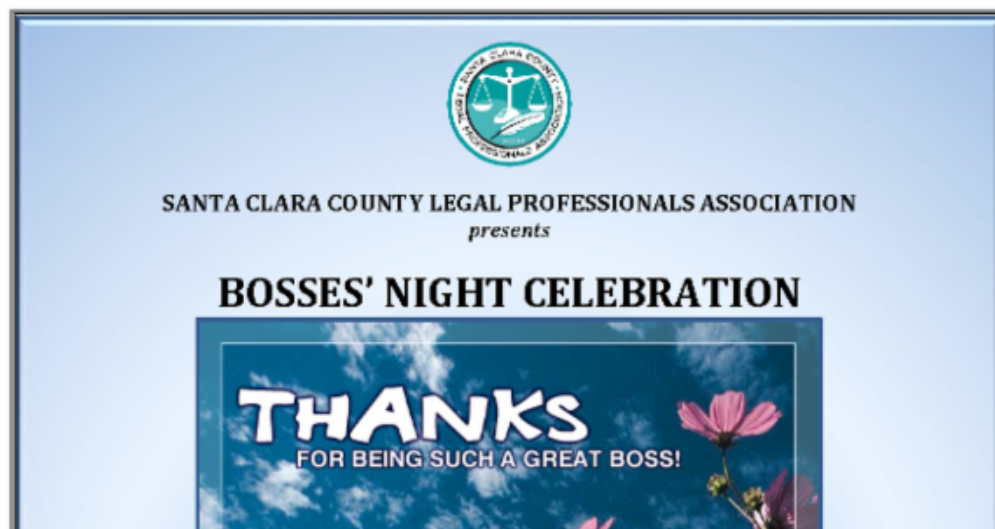
Many thanks to our expert panel and CEC Coordinator Vivian Shreve, CCLS:  
John Duarte, John Del Piero, Neda Shakoori, Esq., and Larry Wilson





## UPCOMING EVENTS

**SCCoLPA's Annual Bosses' Night**  
**October 10, 2017**







**FOR BEING SUCH A GREAT BOSS!**

## NOMINATE YOUR BOSS TODAY!

It's time to acknowledge the wonderful boss you work for. You can appreciate and honor your working relationship with your boss by submitting a nomination for the Best Boss of the Year Award.

The winner will be announced during our combined Day in Court/Bosses' Night dinner on Tuesday, October 10, 2017, starting at 6:00 p.m. at Flames Eatery & Bar in downtown San Jose. This year's Boss of the Year will receive a beautiful plaque commemorating the honor and the nominating member (in good standing) will also receive a plaque! As an extra incentive, the nominating member of this year's Boss of the Year will receive a \$50 gift card! The Association will pay for the dinners of both the winner and the nominating member.

**RULES:**

- Provide a written description of your boss and why he or she deserves to be Boss of the Year. Your entry should not exceed two pages and should be submitted on business letterhead. The entry should be signed and dated by the Association member. Include your boss' name, member's name, and length of employment.
- Email nominations no later than **Friday, September 22, 2017**.
- Both nominee and member must be available and attend Bosses' Night on Oct. 10, 2017.
- Entries will be judged by a committee of three (3) members.

**EMAIL ALL ENTRIES TO:**  
Sheryl Boardman, VP of Marketing  
[Sheryl.boardman@compexlegal.com](mailto:Sheryl.boardman@compexlegal.com)

# UPCOMING EDUCATIONAL WORKSHOP

## SAVE THE DATE!

### State v. Federal Calendaring Procedures October 26, 2017

Do you need a refresher course on calendaring, or are you rusty when it comes to keeping up with the latest calendaring rules in state and federal court? Following outdated requirements can have serious consequences, so it's very important that you know the current rules. SCCoLPA is pleased to present "State v. Federal Calendaring Procedures" with our special guest speaker, Susan Kalra. Susan has presented several workshops for us in the past, including pre-trial calendaring and 100 Days Before Trial, so we are happy to have her back!

Join us on **Thursday, October 26, 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: \$40 for SCCoLPA/LSI Members (includes dinner/no refunds); \$60 for non-members (includes dinner and free one-year membership in SCCoLPA/no refunds).

Register and pay online at [www.sccolpa.org](http://www.sccolpa.org).

## "To Serve or Not to Serve?"

In this month's issue of *The Legal Secretary* magazine, we were very proud to see that Our Very Own Rod Cardinale's article "To Serve or Not to Serve?" was the feature article in the magazine! For all of you who are interested in or have thought about running for an LSI officer position or chairmanship position, this article is not to be missed. The article is all about Rod's journey from his early days in the legal field, to his present position as an LSI Officer. To say the least, we are all so very proud of Rod's accomplishments, and continue to support him as he continues to make a difference and inspires other to follow in his footsteps. Congratulations Rod!



ROD CARDINALE, JR has been in the legal field since 2008. He obtained his Paralegal Certification from Evergreen Valley College, San Jose, CA in 2009. In 2014, Rod joined the Law Office of Janet L. Brewer as Paralegal and Office Manager. Rod has been a member of Santa Clara County LPA since 2009, serving as President from 2010-2014 and is currently serving as Executive Advisor. Rod began serving LSI in 2011 when he was appointed as the Legal Procedure Chair. In May 2012, President Brooke Mansfield, presented Rod with the "LSI President's Award" and continued to serve LSI until he was elected Treasurer in 2016. Rod resides in Santa Clara, California with his wife, Tina, and their three children Alyssa, Anthony and Dominic.

## To Serve, Or Not To Serve?

BY ROD CARDINALE, JR., LSI TREASURER

To serve, or not to serve.... Have you ever thought about running for LSI Office, or putting your name in for a chairmanship, but you just couldn't get yourself to take the chance? I know exactly how you feel! Putting my name out there, especially being one of only a couple of men in a group of women, to be a chairman and then running for and ultimately serving as an officer of our great corporation, were not easy decisions. If you take the chance, it has the potential to have a great impact on you and your life. I want to share my experiences in serving as a chairman, and running for, and serving as, LSI Treasurer in the hopes you will take the chance to challenge yourself, possibly step out of your comfort zone and serve LSI.



My LSI journey began in May of 2010, at my first conference, which was held in Sacramento. Before I attended my first conference, I decided to join my local association. In July of 2009, I took the advice of one of my paralegal professors and joined Santa Clara County Legal Professionals Association ("SCCoLPA") and was elected and installed as its first male President in May of 2010. I was encouraged to attend conference by my professor and our then outgoing President, Chavez. I was a little reluctant to attend the conference, as I was afraid of the unknown, but took a chance, attended and haven't missed a conference since. At the conclusion of that conference, I mentioned to SCCoLPA's newly-installed Governor, Elise Dresser, CCLS ("Elise"), that I had such a good time and I was so energized to go back to SCCoLPA and get to work.

In early 2011, LSI President, Brooke Mansfield, CCLS (2010-2012) ("President Brooke") asked me if I would consider completing the term for the Legal Procedure Chair, who had to step down. After taking time to think about it and consulting with my family, I ultimately decided to step out of my comfort zone and accept the challenge. I would serve in my first LSI capacity, the

remainder of the 2010-2012 term as Legal Procedure Chair and member of the Continuing Education Council ("CEC"). In early 2012, I was again approached by President Brooke. This time, she wanted me to serve as Assistant Registrar of Delegates at the May 2011 Annual Conference, along with Elise, the 2011 Annual Conference Registrar of Delegates.

After attending my first LSI conference, in May of 2010, I mentioned to Elise that SCCoLPA needed to host a conference and I wanted to be the Conference Chairman. Without hesitation, Elise agreed and we began work on trying to host the best conference ever. At the February 2011 Quarterly Conference, our bid to host the 2013 Annual Conference was accepted and I was appointed the Conference Chairman.

In early 2014, incoming LSI President, Mary Beaudrow, CCLS ("President Mary") asked me to consider serving as LSI's Social Media Chairman. I was privately considering running for LSI Treasurer after receiving encouragement from other LSI members who thought I would be a good addition to the Executive Committee ("EC"). I was very conflicted over my belief that I could be an asset to the

8 | THE LEGAL SECRETARY

### TO SERVE, OR NOT TO SERVE?

EC and the time commitment that it would take and who would be affected by this decision. I have a full time job as a Senior Paralegal and Office Manager, a wife, three children, serve as SCCoLPA's Executive Advisor, and have my own interests. Where would I find the time? Who would feel I was spending less time with them? All hard decisions that were bigger and more far-reaching than just me. I ultimately decided I couldn't give all that the position of LSI Treasurer would require and I accepted President Mary's call to serve as LSI's Social Media Chair and Member of the Marketing Committee. This turned out to be a great decision, as I really enjoyed my position and being a member of the Marketing Committee.

or the scope of the question(s), Lynne always responded to me with a detailed response. She would even call me and walk me through some of the processes. Now that I'm comfortable with the duties, things are far less overwhelming and actually quite enjoyable. I look forward to climbing the "LSI Ladder."

Now that I've shared the story of my rise in the ranks of SCCoLPA and LSI, I'm sure many of you have similar stories about your time with your local association, LSI, or even some sort of board or committee in your local communities. All of us lead extremely busy lives and have fears and reservations about doing things we're



President Mary's call to serve as LSI's Social Media Chair and Member of the Marketing Committee. This turned out to be a great decision, as I really enjoyed my position and being a member of the Marketing Committee.

Fast forward to early 2016. Incoming LSI President, Jennifer L. Page, CCLS ("President Jennifer") asked me to consider continuing on as Social Media Chairman. I was again privately considering a run for LSI Treasurer. I found myself in the same conundrum as in 2014 - - should I run or not? My kids were all a couple years older and I felt like I was in a better place to run than I was in 2014, but again, was not sure I could give 100% to the job, so I accepted President Jennifer's call to continue on as Social Media Chair and Member of the Marketing Committee.

At the 2016 Annual Conference, LSI would find itself in a bit of a pickle, as no one had stepped up to run for LSI Treasurer. I went home and shared with my wife, other members of SCCoLPA and LSI that I had twice considered running for Treasurer, but ultimately decided it wasn't the right time for me. What I learned from those conversations was they would support me if I decided to run for the vacant position. After about a month of going back and forth, and armed with the support of those around me, I finally decided that there likely would never be the "perfect time" for me to run for LSI Treasurer, and I submitted my name for consideration for the office of Treasurer. In August of 2016, I was installed as LSI Treasurer and the first elected male officer in LSI's 82-year history.

I'll admit, the job was pretty overwhelming the first month or so as LSI Treasurer. I spent a good amount of time getting to know the policies, procedures and duties of the Treasurer, while trying to keep up with the routine duties of depositing money and paying the bills. Thank God for Lynne Prescott, CCLS, LSI Executive Secretary and immediate past LSI Treasurer. She was absolutely amazing to me! She was somebody to lean on for support and guidance. If I couldn't figure something out, I would reach out to Lynne for help. No matter the time of day

stories about your time with your local association, LSI, or even some sort of board or committee in your local communities. All of us lead extremely busy lives and have fears and reservations about doing things we're not comfortable with. The question we face is, will we succumb to those reservations and fears, or will we tackle them head on? If you're considering a position with your local association, an LSI chairmanship, or even running for elected office of LSI, but can't seem to get past the time commitment or any fears or reservations about the job, you're not alone. There's not one member of the LSI leadership team who doesn't get nervous or feel overwhelmed about their position from time to time. What I've learned along the way is that it's not the fears or reservations about taking on a position, not about what position I've held, what committee I was on, or what accomplishments I've made; rather, it's about the people I've met, the relationships I've formed, and the experiences I've gained. I've made lifelong friendships and relationships that I wouldn't have made if I didn't take the chances I did along the way.

"To Serve, or Not to Serve?" Throughout my journey, the answer to this question has become much clearer. If you experience a similar journey to mine, your life will be richer for the experience and so will LSI's. You will meet interesting people and make lifelong relationships which will add richness to your life that far surpasses the urge to stay inside your box. So, to answer the question, "To serve or not to serve"...SERVE!!

LS

AUGUST 2017 | 9

## GOVERNOR'S CORNER

~ by *Linda Neuman, SCCoLPA Governor* ~

This month's Governor's Corner will focus on LSI's First Quarterly Conference, held August 18-20, 2017 at the Stockton Hilton, in Stockton, CA. My complete Governor's Report is posted on SCCoLPA's Members' Only section of the website. Below is a detailed summary of that report:

LSI's 1st Quarterly Conference was held August 18-20, 2017, at the Stockton Hilton in Stockton, California. The theme for the weekend was "Mission Possible." Attending and representing SCCoLPA were: Rod Cardinale, Jr. LSI Treasurer and SCCoLPA Executive Advisor,) Elise Dresser, CCLS, CCLS Certifying Board Chairman and SCCoLPA President, SCCoLPA Vice President of Membership, Shannon Quigley, SCCoLPA Governor, Linda Neuman, and SCCoLPA Parliamentarian, Elena Schneider, CCLS.

Before the Welcome Reception, the CEC Council offered a workshop entitled "Cannabis: A Combined Medical and Recreational System." The Friday Night Reception was held poolside. During the reception, Shannon and Elena dressed up

as "Santa's elves" and did a GREAT job selling opportunity drawing tickets to raise funds for our conference in Reno next year. Following the Welcome Reception there were two Legal Specialization Section Seminars. The Civil Litigation Section offered "Beginning Litigation Docketing" and the Transactional Section offered "Commercial Cannabis: Smoking Out The Truth About What Is Legal."

As in the past....Bright and early on Saturday morning at 7:30 a.m. LSI's CCLS Chair Terrie Quinton, CCLS, presented a workshop entitled "Skills."

The Board of Governors meeting was called to order on Saturday morning, August 19, 2017, at 9:00 a.m. by LSI President Jennifer L. Page, CCLS, Marin County LPA. Jan Kuykendall, Co-Chair of this Conference, introduced the Welcome Speaker, Michael Tubbs, Mayor of Stockton. Mayor Tubbs, who is the youngest and the first African American Mayor in Stockton, welcomed all in attendance. Mayor Tubbs started out his speech by trying to foil the myth that Stockton is a crime ridden city and ending it with his everyday goal of making the world a better place, so that when he looks back on what he did he can reflect on how he improved the world in some way.

Highlights of the Board of Governors Meeting:

Vice President Heather Edwards thanked the 20 associations that responded to her Directive. She referred everyone to her report that listed programs that associations throughout the state have presented. I was happy to see (Our Very Own) "Taking a Murder Case to Trial" listed in her report.

Heather also announced that a new point system will be in place for submission of Chapter Achievement contest entries starting 03/31/18. These groups are as follows:

Group A - 0 - 10,000 points  
Group B - 10,001 - 20,000 points  
Group C - 20,001 - 30,000 points  
Group D - 30,001 - 40,000 points  
Group E - 40,001 - 50,000 points  
Group F - 50,001 and over points

Treasurer Rod Cardinale, Jr. provided a Summary of Revenue & Expenses to the members, and once again did a WONDERFUL job reading his report.

Current Period Actual

Total Expenses: \$ 53,575

Total Income: \$ 41,581

Income <Deficiency> Over Expenses = <\$ 11,994>

The Board of Governors meeting was recessed at 10:15 a.m. The Criminal /Family Law LSS Section presented "General Factors Re Child & Spousal Support" and the Federal Law LSS Section presented "Overview of Maritime Law."

At the Open Lunch which was moderated by Heather Edwards and (Our Very Own) Rod Cardinale, Jr., the subject of discussion was association membership, how to get, retain and acknowledge. (Our Very Own) Shannon Quigley, SCCoLPA's Vice President of Membership was asked to speak at the lunch on membership in general

and in particular our member appreciation BBQ!!!! Shannon's presentation was a HIT and SCCoLPA is again a rising star in the eyes of associations throughout the state. Go Shannon and Team SCCoLPA!!!)

I attended the Governor's Luncheon, where we reviewed the Executive Committee Resume. My complete report can be found on the Members' Only section of our website.

The afternoon session of the Board of Governors reconvened at 2:11 p.m. LSI Executive Secretary Lynne Prescott called the roll. 29 governors were present, constituting a quorum. The entire afternoon session consisted of the governors voting on the Executive Committee Recommendation and Proposed Bylaw Amendments. You can find a complete report on the voting results in my complete report which can be found on the Members' Only section of our website. However, I do want to report that after many years of deliberating and discussion, the governors finally voted to allow student membership and associate membership in LSI! More details to follow, but this membership tier will become effective next May 2018 - very exciting!

The reports of the officers, appointed officers, committee chairmen and remaining chairs not called to conference are all available on the LSI website.

The Board of Governors meeting was recessed at 4:00 p.m. The afternoon LSS seminars were: The Law Office Administration LSS Section presented "Toxic Employees, Toxic Workplaces" and the Probate and Estate Planning LSS Section presented "The Fiduciary Duty: What Is It And What Does It Impose Upon You?"

We were surprised by a couple of different events at the Saturday Night Banquet. The speaker for the evening broke out in song and President Jennifer awarded Social Media Chairman Erika Garduno the "Shining Star" award for all of her WONDERFUL work as Social Media Chairman last year. (Different and unexpected are GOOD things.)

On Sunday morning, Brunch Chairman Leisel Hart introduced guest speaker Janet Smith, Deputy District Attorney, Homicide Division, San Joaquin County who gave a wonderful speech about how her support staff has inspired her and how important it is to work together like the different instruments in a band.

President Jennifer announced the winners of the four scrip tickets to the November 2017 Quarterly Conference to be held at the Lions Gate Hotel in Sacramento:

- (1) Santa Barbara, LPA
- (2) Desert Palm, LSA
- (3) Santa Clara, LPA (Our Very Own)
- (4) Conejo Valley, LPA

With no further business to come before the Governors, the Board of Governors Meeting was adjourned at 10:17 a.m.

The 1st Quarterly Conference of LSI was adjourned to the 2nd Quarterly Conference on November 10-12, 2017 to be held at the Lions Gate Hotel and Conference Center in Sacramento, California hosted by Placer County LPA.



Respectfully submitted,  
Linda Neuman  
PROUD Governor of SCCoLPA



Conference Chair Jan Kuykendall, CCLS, welcoming the attendees on Friday . . .  
with Norbert!



SCCoLPA has its own Santa's elves - Elena Schneider and Shannon Quigley were busy at work selling opportunity drawing tickets.





Governor Linda Neuman and LSI Life Member Don Lee comparing their "secret agent" trenchcoats - ready for "Mission Possible!"



LSI Treasurer Rod Cardinale, Jr. and Executive Advisor Mary Beaudrow, CCLS getting ready for the Board of Governors meeting





Good friends hanging out before the banquet: Linda Neuman, Heather Nowak, Leanna Pierce



Bettina Jacobson, Rod Cardinale, Jr., and J. Cori Mandy, CCLS



Elena Schneider, CCLS and Heather Nowak



Our Very Own LSI Treasurer Rod Cardinale, Jr. giving his quarterly financial report.





City of Stockton Mayor Michael Tubbs





Spies or Santa's Elves? Elena and Shannon are ready for the next assignment!  
Thank you for a job well done fundraising for SCCoLPA!

## Member in the Spotlight September 2017 Wendy Alvarez, CCLS

*by Shannon Quigley, Vice President of Membership~*

I am proud to announce that our Member in the Spotlight this month is Wendy Alvarez, CCLS.

When Wendy was growing up, she lived all over the Bay Area, from San Francisco to South San Jose, and attended three different high schools, namely Hillsdale High School in San Mateo, Monte Vista High School in Cupertino where she met her husband, and Santa Clara High from where she graduated.

Wendy landed in the legal field in 1990 when a family friend, who was a legal secretary, encouraged her to



interview for the law firm she worked at. Wendy went to the interview and was hired as the receptionist! That is where her legal education began. The attorneys paid for her to take classes offered through the Legal Secretaries, Inc. ("LSI") and before Wendy knew it, she was taking on secretarial work. She joined LSI that same year and has been a member ever since.

When asked what motivates her, she says it is her family, church, and work. Wendy has a son who is 19 and a daughter who is 15 and she finds it rewarding that she is able to "lead by example" by being a positive influence in their lives. She sees it in their work ethics and how they view life.

A day in Wendy's life would go something like this: Get up, get ready for work, eat breakfast, feed their pug (Memphis), make sure her kids are up and getting on their way for school/work, go to work, pick up her daughter from school, come home and visit with her family, workout, make dinner and depending on what day of the week it is, attend church. Go to bed, repeat daily!

When asked how SCCoLPA benefitted her personally and professionally, she states that it has given her a support system, especially when she was studying for the California Certified Legal Secretaries ("CCLS") exam. In 2009, she obtained the CCLS designation after passing a grueling all-day exam and has vowed "to never do it" again! Wendy said that SCCoLPA has also provided her with a network of people who are in the same field as she is and says she has met wonderful people whom she admires and appreciates, especially those who are called to be on the Board. Her daughter will sometimes ask her if she could do anything else for work, what would it be. She tells her that there is not anything else she would rather do because she loves her job. Wendy also said she does not know if she would feel that way if she was not a member of SCCoLPA and all of its perks!

Thank you, Wendy for sharing yourself with us! We congratulate you on being chosen as our September Spotlight Member!

## Board Member in the Spotlight

Have you ever thought about running for a SCCoLPA board position? Or how about a chairmanship position? Nominations and elections are held each year in the spring, so now is the time to start thinking about stepping outside your box and trying something new! You have seen in our newsletters and at our meetings all the great work our officers and chairmen have done throughout the year. Yes, it's a volunteer position and requires some extra time to add to your schedule, but if you talk to any officer or chairman, they will tell you that it's totally worth it!

Last month you read about what our Governor does in a typical month. This month we will feature the role of Treasurer, which position has been held by April Ignaitis, CCLS, for the last several years. April's "Day in the Life" is presented in this month's issue:

### A "Day in the Life" of the SCCoLPA Treasurer

**by: April Ignaitis, CCLS**

\$\$\$\$\$, Per Capita Reports, Quickbooks, Profit and Loss statements, Check Detail, Balance Sheets, and so much more! What does this all mean? Well, its' a day, week, month, year in the life of your SCCoLPA Treasurer.

Let's start with Per Capita Reports. During our membership drive/renewal period each year, I keep track of the membership applications that roll in (i.e., renewals and new members). Then, mid-June of each year, I submit an initial Per Capita Transmittal ("PCT") Report to the LSI Treasurer and the LSI Administrator (LSI is our parent corporation). The PCT lists the number of members that renew as well as new members. The PCT also includes any changes that members may have, such as becoming a new CCLS, or changes in mailing address, employment, etc. I submit the PCT along with a check, as each local association in turn pays dues to our parent corporation, LSI (Legal Secretaries, Inc.). Thereafter on a monthly basis, or as needed, I then submit supplemental PCT's that continue to come in, etc. That is also how LSI keeps track of members in order to mail you The Legal Secretary magazine each quarter. So, if you have any changes to your mailing address, be sure to let us know!

About every April/May, I, along with SCCoLPA President and our EA, prepare our annual budget and present it to the members to vote on.

I collect the money we receive (i.e., cash, checks and paypal) and make weekly deposits based on need (so all those cash/checks/paypal from our membership dinners, fundraisers, workshops, etc., gets deposited). I also write checks to pay for our membership dinner meetings, and any other bills that need to be paid (i.e., post office box, subscriptions and approved reimbursements to members and officers for items paid out of their own pocket.)

After making all those deposits and writing checks, I then enter all that in Quickbooks. Quickbooks is the financial software we use to create the monthly financial reports (such as those balance sheets, profit and loss statements) that are posted to SCCoLPA's website each month under the members only section (if you don't have the password, contact our VP of membership). At the end of each month and before our board meetings, I submit the financial reports (balance sheet, profit and loss statement, check detail, reconciliation report, and deposit summary) to the Executive Board for review.

Then, at the membership dinner meetings, I give my little speech, about posting the financial reports to the website.

Lastly, every mid-September I efile our IRS tax forms, (which are only two forms) and email the confirmation of the efilings to the LSI Treasurer and LSI administrator as confirmation of compliance. Each local association must efile the tax forms each September in order for each local chapter to be able to have their Governor (like our very own Linda Neuman) to be able to "sit" and vote on items that are presented at LSI's annual conferences, which are held in May of each year.

If you have any questions about what the Treasurer's job entails, please feel free to reach out to me!



## Order in the Court

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

### What is Hearsay?



At a trial or legal hearing, hearsay - also known as "report" or "rumor" - is secondhand evidence provided by witnesses who are merely repeating what they heard someone else say. Its accuracy or reliability is solely dependent on someone not present in the courtroom or who has no connection with, or can't be cross-examined for, the legal proceeding in progress. Hearsay is not evidence that is illegally obtained; rather, it is defective evidence. While weak and often not admissible, hearsay is sometimes used as a legal tactic to plant a seed of doubt in the minds of jurors who are duly asked to disregard it by the judge. It can be used by an attorney - knowing hearsay evidence will be objected to by the attorney for the other party and sustained by the judge - to set up another witness, or cast doubt on the credibility of that witness, later in the trial.

## CCLS Monthly Quiz

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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, which is scheduled to take place on March 17, 2018, 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).

## CALIFORNIA CODES

- |                                  |       |
|----------------------------------|-------|
| 1. Business and Professions Code | _____ |
| 2. Civil Code                    | _____ |
| 3. Corporations Code             | _____ |
| 4. Family Code                   | _____ |
| 5. Government Code               | _____ |
| 6. Health and Safety Code        | _____ |
| 7. Insurance Code                | _____ |
| 8. Labor Code                    | _____ |
| 9. Penal Code                    | _____ |
| 10. Probate Code                 | _____ |
| 11. Public Utilities Code        | _____ |
| 12. Vehicle Code                 | _____ |

### ANSWER KEY:

1. Bus. & Prof. Code
2. Civ. Code
3. Corp. Code
4. Fam. Code
5. Gov. Code
6. Health & Saf. Code
7. Ins. Code
8. Lab. Code
9. Pen. Code
10. Prob. Code
11. Pub. Util. Code
12. Veh. Code



**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)<br><input type="checkbox"/> <b>Northern California</b><br><input type="checkbox"/> <b>Southern California</b> | (Select one)<br><input type="checkbox"/> <b>Saturday, September 16, 2017</b><br><input type="checkbox"/> <b>Saturday, March 17, 2018</b> |
|----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|

- **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><small>Payable to "LSI"<br/>Mail to above address</small> | PayPal <input type="checkbox"/><br><small>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.</small> |
|---------------------------------------------|-----------------|---------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <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: _____ |

|                                |                                                                                                         |                  |
|--------------------------------|---------------------------------------------------------------------------------------------------------|------------------|
| Name:                          |                                                                                                         |                  |
| Mailing Address:               |                                                                                                         |                  |
| Last 4 digits of SSN:          |                                                                                                         | Email:           |
| Phone (Day):                   |                                                                                                         | Phone (Evening): |
| LSI Member:                    | <input type="checkbox"/> Yes ( <i>enclose copy of LSI Membership Card</i> ) <input type="checkbox"/> 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 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).

**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 "State v. Federal Calendaring Procedures" on October 26, 2017. If you need a refresher course on calendaring, or need to learn the differences between calendaring in state court vs. federal court, this workshop is not to be missed! 90 minutes of 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.



## 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: _____     | Year I became a member of SCCoLPA: _____            |
| Birthdate: _____                     | How many years with SCCoLPA? _____                  |
| Month/ Day                           |                                                     |

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!



## Happy Birthday to Our Members!

Happy Birthday to the following SCoLPA members:

**April Ignaitis, CCLS - September 3**  
**Irma MacKay - September 3**  
**Tim Willette - September 6**  
**Maria Patterson, CCLS - September 9**  
**Jeanne Smith - September 10**  
**Susan Buchanan - September 25**



**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 November 6 and ending December 18, 2017. 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, NOVEMBER 6, 2017**

Depositions

Verifications

**CLASS SESSION OPENS MONDAY, NOVEMBER 6, 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 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 November 3, 2017, 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 November 6, 2017. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study.

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

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**SERVE, SURVIVE, & THRIVE WITH LSI  
A TRIBUTE TO OUR MILITARY**

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**PLACER COUNTY LEGAL PROFESSIONALS ASSOCIATION**

NOVEMBER 10, 11, &amp; 12, 2017

LSI QUARTERLY CONFERENCE

LIONS GATE HOTEL &amp; MCCLELLAN

CONFERENCE CENTER, MCCLELLAN, CALIFORNIA

**CONFERENCE REGISTRATION FORM**

NAME (ON BADGE): \_\_\_\_\_  
 MAILING ADDRESS: \_\_\_\_\_  
 CITY/STATE/ZIP: \_\_\_\_\_  
 HOME PHONE: \_\_\_\_\_ WORK PHONE: \_\_\_\_\_  
 E-MAIL ADDRESS: \_\_\_\_\_  
 LOCAL ASSOCIATION: \_\_\_\_\_ LSA/LPA (FULL NAME)

PLEASE CHECK IF APPLICABLE AND INCLUDE TITLE:

☐ STATE OFFICER \_\_\_\_\_☐ STATE CHAIRMAN \_\_\_\_\_

PLEASE CHECK IF YOU ARE:

☐ GOVERNOR ☐ CCLS ☐ PLS

SCRIP (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET AND BRUNCH)

POSTMARKED ON OR BEFORE OCTOBER 9, 2017 \$120.00 \$ \_\_\_\_\_

POSTMARKED OCTOBER 10, 2017 OR LATER \$130.00 \$ \_\_\_\_\_

**INDIVIDUAL TICKETS**

|                                        |       |         |          |
|----------------------------------------|-------|---------|----------|
| REGISTRATION BY OCTOBER 9, 2017        | ___ @ | \$20.00 | \$ _____ |
| REGISTRATION OCTOBER 10, 2017 OR LATER | ___ @ | \$30.00 | \$ _____ |
| WELCOME RECEPTION (FRIDAY)             | ___ @ | \$25.00 | \$ _____ |
| GOVERNOR'S LUNCHEON (SATURDAY)         | ___ @ | \$25.00 | \$ _____ |
| PRESIDENT'S LUNCHEON (SATURDAY)        | ___ @ | \$25.00 | \$ _____ |
| OPEN LUNCHEON (SATURDAY)               | ___ @ | \$25.00 | \$ _____ |
| SATURDAY NIGHT BANQUET                 | ___ @ | \$50.00 | \$ _____ |
| VEGETARIAN MEAL REQUESTED              |       |         |          |
| SUNDAY BRUNCH                          | ___ @ | \$35.00 | \$ _____ |
| TOTAL AMOUNT ENCLOSED                  |       |         | \$ _____ |



SATURDAY NIGHT BANQUET \_\_\_\_\_ @ \$50.00 \$ \_\_\_\_\_  
 \_\_\_\_\_ VEGETARIAN MEAL REQUESTED  
 SUNDAY BRUNCH \_\_\_\_\_ @ \$35.00 \$ \_\_\_\_\_  
 TOTAL AMOUNT ENCLOSED \$ \_\_\_\_\_

PLEASE MAKE CHECKS PAYABLE TO: **PCLPA CONFERENCE FUND**

MAIL TO: MICHELLE RODGERS, CCLS  
 24740 ORO VALLEY ROAD  
 AUBURN, CA 95602

FOR GENERAL INFORMATION CONTACT: REGISTRATION CHAIR - MICHELLE RODGERS, CCLS (530) 613-9512 - [mrodgerscls@gmail.com](mailto:mrodgerscls@gmail.com) OR CONFERENCE CO-CHAIRS - BETTINA JACOBSON, (916) 616-8159 - [bettinajacobson@gmail.com](mailto:bettinajacobson@gmail.com) - RACHEL MALERBI, (916) 217-5569 - [rachel@iamisonfamilylaw.com](mailto:rachel@iamisonfamilylaw.com)

**NO REFUNDS AFTER OCTOBER 9, 2017**



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LIONS GATE HOTEL & CONFERENCE CENTER  
 MCCLELLAN, CALIFORNIA



#### HOTEL REGISTRATION FORM

LIONS GATE HOTEL  
 3410 WESTOVER STREET  
 MCCLELLAN, CA 95652  
 PH: 916/640-6222



NAME: \_\_\_\_\_  
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 CITY/STATE/ZIP: \_\_\_\_\_  
 HOME PHONE: \_\_\_\_\_ WORK PHONE: \_\_\_\_\_  
 E-MAIL ADDRESS: \_\_\_\_\_  
 LOCAL ASSOCIATION: \_\_\_\_\_ LSA/LPA (FULL NAME)  
 ARRIVAL DATE: \_\_\_\_\_ DEPARTURE DATE: \_\_\_\_\_

ACCOMMODATIONS: (PLUS APPLICABLE TAXES AND FEES)

- ☐ QUEEN BED - \$115.00  
☐ QUEEN BED HANDICAP - \$115.00  
☐ KING BED DELUXE - \$115.00  
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[https://cc.synxis.com/req.aspx?Chain=13325&template=LEX\\_GCLX&shell=LEX\\_FLEX&hotel=59015&arrive=11%2015%272017&depart=11%2015%272017&Rooms=1&adults=1&group=LSI](https://cc.synxis.com/req.aspx?Chain=13325&template=LEX_GCLX&shell=LEX_FLEX&hotel=59015&arrive=11%2015%272017&depart=11%2015%272017&Rooms=1&adults=1&group=LSI)

PARKING IS FREE AND TRANSPORTATION FROM THE AIRPORT CAN BE MADE THROUGH THE HOTEL. THE HOTEL REQUIRES AT LEAST 48 HOURS ADVANCE NOTICE WITH FLIGHT INFORMATION AND CELL #

FOR GENERAL INFORMATION CONTACT: REGISTRATION CHAIR - MICHELLE RODGERS, CCLS (530) 613-9512 - [mrodgerscls@gmail.com](mailto:mrodgerscls@gmail.com) OR CONFERENCE CO-CHAIRS - BETTINA JACOBSON, (916) 616-8159 - [bettinajacobson@gmail.com](mailto:bettinajacobson@gmail.com) - RACHEL MALERBI, (916) 217-5569 - [rachel@iamisonfamilylaw.com](mailto:rachel@iamisonfamilylaw.com)

**HOTEL REGISTRATION DUE BY OCTOBER 27, 2017**





AUGUST 2017 | 21

## 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)





Mary L. King, CCLS  
10/01/36 - 04/12/12

## San Mateo County Legal Professionals Association Celebrates

# Mary L. King Day at the Races Sunday, October 22, 2017

Golden Gate Fields Gates open at 11 a.m.

Cost: \$48 per person, \$20 for children 5 to 17  
(4 and under/free)

Includes: Valet preferred parking, Program, Turf Club  
Seating and Prime Rib Buffet Lunch

**There will be a hat contest!!**  
**1st, 2nd & 3rd prize winners!**



**Make this a fundraising opportunity for your Association**  
**For details contact your local Inter-Association Chairman**

Bonnie Stensler, PLS, CCLS  
Inter-Association Chairman San Mateo County LPA  
[bjstensler@comcast.net](mailto:bjstensler@comcast.net) or call: 415-613-9873

\*Turf Club Dress Code: All guests including children are requested to dress in a smart casual style. Sweat pants/suits, T-shirts, baseball hats, and thong style shoes are strongly discouraged; Stylish casual footwear including tennis shoes are welcome. Guests arriving in shorts, tank tops or clothing with offensive logos will be denied access into the Turf Club.







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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!

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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.

**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  
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low-income and disadvantaged individuals and families.

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#### *About Esquire Deposition Solutions*

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

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## **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).

## **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  
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Elena Schneider, 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

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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