



## THE ADVANCE SHEET SCCoLPA's News & Events November 2016

Greetings SCCoLPA Members!

Happy November! The holiday season is quickly approaching, which means it's time to start your holiday cleaning, decorating, cooking, and checking items off of that holiday shopping list. Be sure to plan your time wisely so that you don't stress yourself out with all your chores, and make sure you find time to relax and enjoy the festivities with your family and friends. As this is the season to give thanks, we want you to know that we are always thankful and appreciate your support and involvement with Santa Clara County Legal Professionals Association, even though we know your schedules are very busy as we rush towards the end of the year.

Before we say goodbye to 2016, we want to invite you to our November and December monthly membership meetings. On **November 8, 2016**, we will present "Microsoft Excel for the Law Office," to be held at Gordon Biersch in downtown San Jose. If Excel intimidates or frustrates you, this is a presentation not to be missed! Bring your questions to the meeting and our guest speaker will help you through them. It's also Election Day, so please remember to VOTE EARLY so that you can make it to our meeting.

Our **December 13, 2016** dinner meeting is our traditional holiday celebration, so we will not be presenting a formal program. Instead, we invite you to celebrate the holiday season, and join with us in the spirit of giving. We will announce the recipients of our annual holiday charitable donations, and also partake in our annual "White Elephant/White Reindeer" gift exchange. Bring a wrapped gift (valued at no more than \$20), draw a number, and then let the stealing and hilarity begin!

By now you have heard about our holiday "Mixed Bag" fundraising endeavor. It's so easy to support us - just shop online! Simply go to [www.mixedbagdesigns.com/?fundraiserid=604410](http://www.mixedbagdesigns.com/?fundraiserid=604410), make sure our ID# (604410) is at the top of the website page, and start shopping! We will receive **40%** of every online purchase you make, and shipping is FREE on orders over \$75! This is the perfect time to get some of your holiday shopping done - Mixed Bag sells tote bags, accessories, kitchenware, home decor, gift wrap, and so much more! The deadline for our fundraiser is **November 8, 2016**, so don't wait - start shopping now! For more information, see further down in this newsletter. We appreciate your support!

SCCoLPA continues to plan and offer educational workshops in a classroom format. The goal is to provide you the education, certification, and skills to advance your careers. We strive to

offer the highest-quality courses in order to meet your needs, and we encourage you to let us know what YOU need to meet your individual educational goals. Many of you expressed interest in attending a workshop on Basic Civil Litigation for the Legal Secretary/Legal Assistant. We will be starting an 8-week training session starting on **January 12, 2017**, and the classes will be taught by SCCoLPA Past President Patty Russell. Further information can be found in this newsletter, and registration is now open on our website.

On Saturday, **January 21, 2017**, we will be offering a four-hour Ethics workshop, entitled "Ethics for Everyone - The Basics and Beyond," at Wilson, Sonsini, Goodrich & Rosati in Palo Alto. The workshop will be taught by LSI Member Diane Mecca, Certified Paralegal Instructor at Abrams College. This is your opportunity to take care of all your required continuing education ethics hours!

Being a member of SCCoLPA has been very rewarding to so many people over the years. We offer membership to legal secretaries, legal assistants, paralegals, attorneys, students, and individuals who provide legal support to you and your offices. We want our association to grow and flourish now and in the future, so we encourage each and every one of you to help us increase our membership. Starting now, SCCoLPA will be conducting a **Membership Drive**, which will run through January 31, 2017. And here's a little incentive - the member who brings in the most new members between now and the deadline will receive a \$100 Visa gift card! The winner will be announced at our February 14, 2017 monthly membership meeting. We want you and your co-workers and colleagues to be a part of the best legal professionals community in Santa Clara County! Your Executive Board is also working very hard to improve how we can increase membership and membership participation in our events. Your feedback is important to us and helps us to come up with ideas that will benefit you the most. Please feel free to reach out to us with any ideas you may have so that we can provide the best experience we can to our members.

As a reminder, "The Advance Sheet" will be distributed monthly in an online format right here via Constant Contact. Please feel free to share the newsletter with your co-workers, colleagues, and employers, and encourage them to join our association! Please also remember to "like" our Facebook page (<https://www.facebook.com/SCCoLPA>) to view all upcoming events, as well as to see what we've been up to lately.

Thank you for the opportunity to serve on the best Executive Committee on the best association in the state! I look forward to seeing all of you at our upcoming events and meetings.

Happy Holidays!

Elise Dresser, CCLS  
President

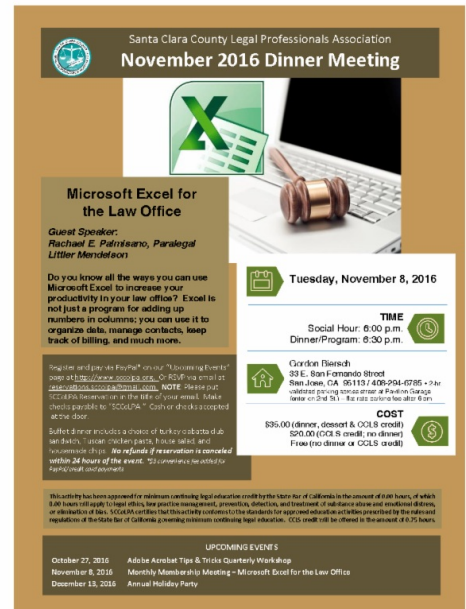


## Upcoming Monthly Meetings

### November 8, 2016 Monthly Dinner Meeting

Do you know all the ways you can use Microsoft Excel to increase your productivity in your law office? Excel is not just a program for adding up numbers in columns; you can use it to organize data, manage contacts, keep track of billing, and much more. Do you need help creating workbooks, changing column width and height, creating and copying formulas, scaling and printing? Look no further than at our November 8, 2016 dinner meeting, where we will present "Microsoft Excel for the Law Office."

Please join us as we welcome Rachael E. Palmisano, Paralegal at Littler Mendelson, who will show you all the latest tips and tricks. Bring your questions and Rachael will help you! CCLS credit in the amount of .75 hours will be offered. It's Election Day, so don't forget to vote early!



**Santa Clara County Legal Professionals Association**  
**November 2016 Dinner Meeting**

**Microsoft Excel for the Law Office**

**Guest Speaker:**  
Rachael E. Palmisano, Paralegal  
Littler Mendelson

Do you know all the ways you can use Microsoft Excel to increase your productivity in your law office? Excel is not just a program for adding up numbers in columns; you can use it to organize data, manage contacts, keep track of billing, and much more.

**Tuesday, November 8, 2016**

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

**Cost:**  
\$35.00 (dinner, dessert & CCLS credit)  
\$25.00 (CCLS credit, no dinner)  
Free for members & CCLS credit

**UPCOMING EVENTS**  
October 27, 2016: Adobe Acrobat Tips & Tricks Quarterly Workshop  
November 8, 2016: Monthly Membership Meeting - Microsoft Excel for the Law Office  
December 13, 2016: Annual Holiday Party

### December 13, 2016 Monthly Dinner Meeting



**Santa Clara County Legal Professionals Association**  
**2016 Holiday Party**

**"White Reindeer" Gift Exchange**  
Join us for a fun-filled, festive evening! Bring a wrapped gift not to exceed \$20 and participate in our "White Reindeer" gift exchange!

**Tuesday, December 13, 2016**  
Social: 6:00 p.m. Dinner: 6:30 p.m.  
**Gordon Biersch**  
33 E. San Fernando Street, San Jose (408) 294-6785  
Validated parking (2 hrs) across the street at the Pavilion Garage (enter on second St.) - Flat rate fee after 6:00 p.m.  
**Reservations \$35.00**

**UPCOMING EVENTS**  
October 27, 2016: Adobe Acrobat Tips & Tricks Quarterly Workshop  
November 8, 2016: Monthly Membership Meeting - Microsoft Excel for the Law Office  
December 13, 2016: Annual Holiday Party

Ho Ho Ho! Join us on December 13, 2016 for our annual holiday celebration! It's sure to be a fun-filled, festive evening at Gordon Biersch as we ring in the holidays. Join us as we play our traditional White Elephant gift exchange - just bring a wrapped gift not to exceed \$20 in value, pick a number out of a hat, and let the stealing begin! We will also announce the worthy recipients of our annual holiday charitable donations.

Do you want to show off that lovely Christmas sweater that's at the back of your closet? Wear it to the party and if you are judged to have the "ugliest" sweater, you'll win a special prize! We will also play some holiday trivia games with every winner receiving a prize!

Hope to see you there - with bells on!

**IMPORTANT NOTICE: WE HAVE MOVED!** Please note that we have moved to Gordon Biersch Brewery for our dinner meetings! We will be in the private Pilsner dining room, across from the main entrance and outdoor patio. The restaurant is located at 33 E. San Fernando Street (between 1st and 2nd Streets), San Jose, CA 95113, (408) 294-6785. Validated parking is available at the Pavilion Garage located underground through the 2nd Street entrance.

## SCCoLPA Presents:

## BEGINNING CIVIL LITIGATION FOR LEGAL SECRETARIES, LEGAL ASSISTANTS, PARALEGALS, AND LEGAL SUPPORT STAFF

## An 8-Week Training Course Starting January 12, 2017

SCCoLPA is pleased to offer an eight-night workshop on Basic and Conclusive Civil Litigation Procedures for the beginning and re-entry level legal professional (i.e., legal secretary, legal assistant, paralegal, receptionist, and anyone interested in obtaining knowledge of civil procedures). This is also a great opportunity to refresh your knowledge and skills.

Topics covered include:

- Introduction to Civil Litigation and Pre-Litigation Intake
- Complaints/Answers/Cross-Complaints
- Discovery (two nights)
- Motions
- Motions for Summary Judgment
- Pre-Trial and Trial Procedures
- Court Rules and Statutes
- Calendaring

Attendees are required to attend each session to obtain a Certificate of Completion. Six (6.0) hours of CCLS credit to be offered for the entire 8-week workshop. The classes will be presented and taught by SCCoLPA Past President Patty Russell, beginning January 12, 2017.

The training courses will be held on Thursday evenings from 6:30 p.m. to 8:00 p.m., at Hoge, Fenton, Jones & Appel, 60 S. Market Street, 12th Floor, San Jose. Light snacks and beverages will be provided.

Workshop fees: \$150.00 (includes the Legal Secretaries Reference Guide and course materials). **Registration Deadline: December 16, 2016.** Registrations received after December 16, 2016: \$175.00. All fees must be paid prior to the beginning of the workshop. Register online and pay via PayPal at [www.sccolpa.org](http://www.sccolpa.org).





## 8 - Week Training Course **BEGINNING CIVIL LITIGATION** For Legal Secretaries & Legal Support Staff

►► **Thursdays Beginning January 12, 2017** ◀◀  
**6:30 p.m. – 8:00 p.m.**

**Hoge, Fenton, Jones & Appel**  
**60 South Market Street, 12th Floor, San Jose, CA 95113-2396**

Santa Clara County Legal Professionals Association is pleased to offer an eight-night workshop on Basic and Conclusive Civil Litigation Procedures for the beginning and re-entry level legal professional (i.e., legal secretary, legal assistant, paralegal, receptionist, and anyone interested in obtaining knowledge of civil procedures). This is also a great opportunity to refresh your knowledge and skills.

Classes presented and taught by  
SCCoLPA Past President Patty Russell,  
beginning January 12, 2017

### TOPICS COVERED:

- ♦ Introduction to Civil Litigation and Pre-Litigation Intake
- ♦ Complaints/Answers/Cross-Complaints
  - ♦ Discovery (two nights)
  - ♦ Motions
- ♦ Motions for Summary Judgment
  - ♦ Pre-Trial and Trial
  - ♦ Rules and Statutes
  - ♦ Calendaring

Attendees are required to attend each session to obtain a Certificate of Completion. 6.0 hours of CCLS credit to be offered for entire 8-week workshop. Light snacks and beverages provided.

### ENROLLMENT INFORMATION

Deadline for Registration: December 16, 2016

Registration Fee: \$150.00 (includes class materials) - Registration received after Dec.16, 2016: \$175.00

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

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

Phone/Fax: \_\_\_\_\_ Amount Paid: \$ \_\_\_\_\_

All fees must be paid prior to the beginning of the 8-week workshop. Please make checks payable to "Santa Clara County Legal Professionals Association" or "SCCoLPA" and mail registration form and check to: SCCoLPA, P.O. Box 90509, San Jose, CA 95109. Receipt available upon request. OR register and pay online on our website, [www.sccolpa.org](http://www.sccolpa.org), under "Upcoming Events."

## SAVE THE DATE!

Hooray! We have a date for SCCoLPA's much-anticipated 7th Annual Crab Feed! Mark **February 11, 2017** on your calendar and plan to attend the BEST crab feed in town! We'll be serving fresh Dungeness crab, garlic bread, salad, pasta featuring Rod's Famous Pasta

Sauce, and dessert. Wine, beer, soda, and water will be sold at the bar.

**Please note: We have moved to a new location!** The crab feed is moving to the Quinlan Community Center, 10185 N. Stelling Road, in Cupertino. You will love this new venue! Once again DJ Lannie will be spinning tunes when the dance floor opens, and we'll also feature a HUGE silent auction!

Ticket prices are \$45 for adults and \$20 for children (4-12). You can buy tickets on our website ([www.sccolpa.org](http://www.sccolpa.org)) or online at <http://sccolpacrabfeed.eventbrite.com>.

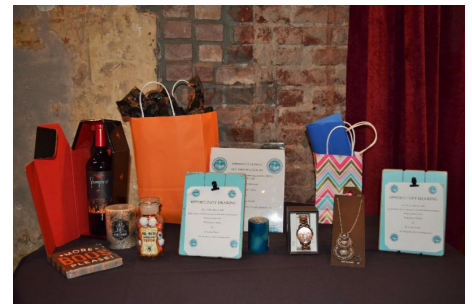


## OCTOBER HIGHLIGHTS

### October Membership Meeting October 11, 2016

Our October 11, 2016 Day in Court & Annual Bosses' Night was held at Gordon Biersch in downtown San Jose. Members enjoyed a delicious dinner buffet that included Mediterranean pizza, bruschetta chicken, salad, and Gordon Biersch's world-famous garlic fries. Special thanks to our guest speaker, Tamara Davis, Deputy Manager of the Santa Clara County Superior Court, who presented an overview of the Santa Clara County Civil Grand Jury. It was also a very special evening as SCCoLPA honored Attorney William Faulkner of McManis Faulkner as its Boss of the Year! Congratulations to Mr. Faulkner and to Elena Schneider, CCLS, who nominated her boss and read her inspirational nominating letter to the member. Well deserved to you both!

Thank you all for attending and we look forward to seeing you at our future meetings and events!







*Day in Court guest speaker Tamara Davis, Deputy Manager, Santa Clara County Superior Court.*



*Vice President of Membership Shannon Quigley presented SCCoLPA's Member in the Spotlight for October to SCCoLPA Past President and current LSI Treasurer to Rod Cardinale, Jr. Rod was honored for his unwavering dedication to the Association, and for stepping up to serve on LSI's Executive Board. We are*



*William Faulkner, Esq., SCCoLPA's Boss of the Year 2016 and Nominating Member Elena Schneider, CCLs*





*Let there be cake!*



*Continuing Education Chair and CCLS Chair Vivian Shreve, CCLS, and Gus Shuwayhat of Planet Depos. Thanks to Gus for informing our members about Planet Depos and all the services it offers to the local legal community. Thanks also for all the goodies!*

## ***WELCOME TO OUR NEW MEMBERS!***

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

**Denise Aki-Valles  
Adriana Bonilla  
Melissa Cardinale  
Madison Corbitt  
Jackie Ferreira  
Franchette Garcia**

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

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## **SAN MATEO COUNTY LPA'S DAY AT THE RACES October 23, 2016**

Several SCCoLPA members attended San Mateo County LPA's Annual Mary King Day at the Races, held on October 23, 2016 at Golden Gate Fields in Emeryville, CA. We enjoyed seeing many of our LSI friends, enjoyed a delicious brunch, and watched some exciting horse racing! To top it off, our group was escorted down to the field where we were able to get our picture taken with one of the winning jockeys! We had a great time and hope to return next year!





## Governor's Corner

~ by Linda Neuman, SCCoLPA Governor

### What Goes on at a Governors' Lunch During an LSI Conference?

Have you ever wondered what the 37 Governors do when they assemble for lunch at Conference?

No, we don't have a secret ceremony or perform a secret handshake. We do enjoy a lovely lunch and some pretty good dessert. But all the while we are going over an agenda full of items to address, including going over the Executive Committee (EC) Resume which is usually 4 pages long. The EC Resume is comprised of items the EC discussed during their all-day meeting on Friday before the business portion of the meeting on Saturday at any given Conference.

Since the general assembly does not know which items listed on the EC Resume the Governors asked questions about or requested clarification on, if you as Governor addressed





any items on the EC Resume at the Governors' lunch, you must get up at the General Assembly and ask your question again. The Governors had the benefit of an answer or clarification at the lunch but the other members in attendance did not.

The Luncheons are moderated by the LSI Executive Secretary and the LSI Parliamentarian. Before each Conference the Governors are required to forward a "Notice of Attendance at Conference" which gives the LSI Executive Secretary the basis for her roll call and quorum numbers at Conference. In addition to submitting our names for attendance purposes, there is always a space on the form for the Governors to request a subject or topic to be addressed at the luncheon. These are where some of the agenda items come from. Sometimes the LSI Parliamentarian is in attendance to clarify if the Governors will be voting on a particular Bylaw or Standing Rule Amendment and whether it is a majority vote by voice or by a standing 2/3 vote.

We as Governors have a lot of material we cover at the lunch and you almost never see an idle pen or pencil, everyone is taking notes or voicing their opinions. It truly is a working lunch.

If any member has a topic you would like voiced at a Governors lunch, please let me know and when I send in my Notice of Attendance at the next Conference I will get that topic put on the agenda, and let you know what LSI and the other Governors have to say about it.

I hope you now have a better understanding of what goes on at the Governors Lunch at Conference.

Until next time..... Linda Neuman, the proud Governor of SCCoLPA.

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## Member in the Spotlight November 2016

If you've been wondering who designs all our great event flyers every month and keeps our website up and running, it's none other than SCCoLPA's Member in the Spotlight for November, our very own Mark Dresser, Website Coordinator and Social Media Chair.



Mark began his legal career over 25 years ago, working as a court runner at the law firm of Newton Remmel in Mountain View. Over the years, Mark's job duties expanded as he learned all aspects of how to run a law firm behind the scenes. He developed an in-house billing program for the firm, and handled all accounts payable and receivables. He also designed the firm's website and supervised its maintenance. When the partners at Newton Remmel retired last year, Mark landed a job at the law firm of McManis Faulkner in San Jose, where he is a member of the firm's financial team.

Mark has been a member of SCCoLPA since 2011, but before then had been designing all of SCCoLPA's promotional materials for several years. Ever since he was asked to design the flyer for our very first crab feed, we knew we had a winner! Mark designs and creates every monthly dinner flyer, our educational workshop flyers and all our fundraiser flyers. We don't know how he does it, but every flyer is unique and distinct and we admire his endless creativity. We thank Mark for his dedication to the Association and congratulate him for being selected November's Member in the Spotlight!

## **LATEST COURT UPDATES:**

### **U.S. DISTRICT COURT - NORTHERN DISTRICT OF CALIFORNIA**

#### **FRCP 6 re Time to Respond to Electronic Service**

FRCP 6, which provides 3 more days for responding when papers are served electronically, is set to disappear effective December 1, 2016 (yes, Dec. 1, not Dec. 31). It's in our FRCP books and explained in Committee note as being no longer necessary given advances in technology. Here's a link reflecting the change. <https://www.federalrulesofcivilprocedure.org/latestupdates/>

#### **Duty Judges/New Judges**

Effective October 2016: [www.cand.uscourts.gov/dutysch](http://www.cand.uscourts.gov/dutysch)

**U.S. DISTRICT COURT - CENTRAL DISTRICT OF CALIFORNIA** The Central District Court has preliminarily approved amendments to the local rules listed below. Their proposed effective date is December 1, 2016. A redline of the proposed changes accompanies the electronic version of this notice and may also be found on the Court's website. The proposed amended rules are the following:

#### Local Civil Rule:

\* L.R. 83-17.2 [Timely Notice of Execution Dates From California Attorney General]

#### Local Criminal Rule:

\* L.Cr.R. 46-2.1 [Written Consent of Surety]

### **U.S. BANKRUPTCY COURT - NORTHERN DISTRICT OF CALIFORNIA**

\*Change of U.S. Postal Service mailing address for the San Francisco location, effective immediately:

U.S. Bankruptcy Court  
450 Golden Gate Avenue  
P.O. Box 36099  
San Francisco, CA 94102

### **SANTA CLARA COUNTY SUPERIOR COURT**

#### **\*New Judicial Leadership Named by Santa Clara County Judges**

Assistant Presiding Judge Patricia Lucas to become Presiding Judge; Criminal Supervising Judge Deborah Ryan named new Assistant Presiding Judge:

[www.scscourt.org/general\\_info/news\\_media/newspdfs/PR\\_NewLeadership2016.pdf](http://www.scscourt.org/general_info/news_media/newspdfs/PR_NewLeadership2016.pdf).

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## **ORDER IN THE COURT - TEST YOUR LEGALESE!**

*~ by Elena Schneider, CCLS, SCCoLPA Parliamentarian*

### **What is a tort?**

A tort is a private or civil wrong - anything from defamation to physical assault - that results in money damages having to be paid. There are three elements to any tort action: a legal duty between the accused and the accuser must have been in place; a breach of that legal duty

must be proven; and it must be shown that damages resulted from that proven breach. If, for example, a dog bites the next-door neighbor's child, necessitating medical attention, a tort claim may be pending against the owners of the dog. The plaintiffs would have to prove the owners were negligent in their legal duty to control the dog or that they breached their duty to protect from harm those who entered their property. Restaurant owners would be liable to tort action should a customer contract food poisoning, and theater owners could face tort action if a patron is injured due to an ill-lit corridor or a defective seat.

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## **NEED A TAX WRITE OFF?**

*~ by April Ignaitis, CCLS, SCCoLPA Treasurer and Ways & Means Chair*

Hard to believe that it's approaching that time of year! If you are looking for a year-end tax write off, look no further than your own SCCoLPA! Your generous cash/check donation will go towards continuing SCCoLPA's mission of providing continuing education programs, promoting a high standard of ethics, and offering scholarships to worthy students who are interested in pursuing the field of law, as well as other programs in which we are involved.

Our 501(c)(3) documentation can be provided upon request. If you have any questions, please contact President Elise Dresser, CCLS, at [endresser@gmail.com](mailto:endresser@gmail.com).

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## **CCLS QUIZ OF THE MONTH**

*~ by Vivian Shreve, CCLS, SCCoLPA Continuing Education Council Coordinator,  
CCLS Chair*

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 October 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 18, 2017, please contact SCCoLPA's CCLS Chair, Vivian Shreve, CCLS, at [vshreve@wsgr.com](mailto:vshreve@wsgr.com). Applications can be found on SCCoLPA's website, or LSI's website at [www.lsi.org](http://www.lsi.org).

## **CALENDARING**

Match the documents with its due date.

- |    |     |   |  |
|----|-----|---|--|
| 1. | ___ | Overnight mail extension of time.                 | A. No later than 10 days after initial trial date setting or 70 days before initial trial date, whichever is closer to trial |
| 2. | ___ | Notice of motion and motion.                      | B. 5 calendar days   |
| 3. | ___ | Case Management Conference Statement              | C. 16 court days before the hearing  |
| 4. | ___ | Demand for exchange of expert witness information | D. 2 court days  |



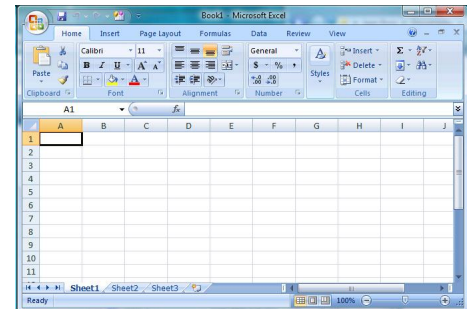
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| 5.     ___ | Responses to written discovery     | E. 5 court days before the hearing                      |
| 6.     ___ | Reply to motion                    | F. 15 calendar days before the hearing                  |
| 7.     ___ | Request for entry of default       | G. 30 calendar days after service.                      |
| 8.     ___ | Notice of ex parte application     | H. 9 court days before the hearing.                     |
| 9.     ___ | Service by mail extension of time. | I. 10 calendar days after response to complaint was due |
| 10.    ___ | Opposition to motion               | J. 10:00 a.m. the court day preceding the hearing       |

Answer Key:

1. D
2. C
3. F
4. A
5. G
6. E
7. I
8. J
9. B
10. H

## We're Listening to You!

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 regular email blasts as we announce more educational workshops to be presented in the next several months.



Starting on January 12, 2017, we will offer a series of training classes entitled "Beginning Civil Litigation for Legal Secretaries & Legal Support Staff." The classes will be taught by SCCoLPA Past President Patty Russell and will be held at Hoge Fenton in downtown San Jose on Thursday nights. Additional information is in this newsletter and also on our website, [www.sccolpa.org](http://www.sccolpa.org). Topics covered in these training classes will include An Introduction to the Law Firm Environment; Law Office Procedures; Calendaring, Filing, Discovery, Motion Practice, and Trial Preparation.

Future programs in 2017 will include an Ethics workshop, 100 Days Before Trial, and eDiscovery.

If you have any other ideas or suggestions for future workshops, please contact us!

## Calling All Members - We Need Your

**Participate in our Fall/Winter Membership Drive! The SCCoLPA member who refers the most new members to the association will win a \$100 Visa gift card! The drive runs from now until January 31, 2017, so get your co-workers and colleagues to join!**

## Santa Clara County Legal Professionals Association MEMBERSHIP DRIVE 2016-2017

**JOIN TODAY!**

### WHAT SCCoLPA OFFERS:

**MEMBERSHIP**

**NETWORKING**

**EDUCATIONAL  
SEMINARS &  
WORKSHOPS**

**LOCAL JOB POSTINGS**

**Let's Grow Together!  
Be a Part of the  
Largest Legal  
Professionals  
Community in Santa  
Clara County!**

### WHO CAN JOIN?

- Legal Secretaries
- Legal Assistants
- Paralegals
- Attorneys
- Students
- Legal Support Providers




### MEMBERSHIP DRIVE CONTEST:

**For every new member you bring who  
signs up for membership between  
September 1, 2016 through January 31,  
2017, you will be entered to win a \$100  
Visa gift card. Winner will be announced  
at SCCoLPA February 14, 2017 General  
Membership Meeting**

## Membership Dues Promotion 2016-2017

U.S. Legal Support is pleased to announce its new 2016-2017 Membership Dues Payment Program! Place 8 record retrieval orders and U.S. Legal will pay your 2016-2017 annual membership dues (\$50 maximum donation)! Orders must be placed before 9/30/16 in order to qualify. If you have already submitted your 2016-2017 dues, U.S. Legal will apply your orders toward the 2017-2018 dues. The official order form is available on SCCoLPA's website ([www.sccolpa.org](http://www.sccolpa.org)) and for additional information, contact Geoff Cohen at [gcohen@uslegalsupport.com](mailto:gcohen@uslegalsupport.com).



**Santa Clara County Legal Professionals Association  
Promotional Program**

**U.S. Legal Support is happy to announce our new  
2016/2017 Santa Clara County Legal Professionals Association  
Membership Dues Payment Program!**

The details are simple:

Place 8 Record Retrieval orders, fill out the required information on the attached page and U.S. Legal Support will pay your 2016/2017 Annual Dues!™ Orders must be placed before September 30, 2016 in order to qualify. If you've already submitted your 2016/2017 Annual Dues, we will apply your orders toward the 2017/2018 dues. If you're not a current U.S. Legal Support customer, please visit our website at [www.uslegalsupport.com](http://www.uslegalsupport.com) and register for our online portal.

For any additional information, feel free to contact your U.S. Legal Support Account Representative, Geoff Cohen, at 415.259.8302 or via email at [gcohen@uslegalsupport.com](mailto:gcohen@uslegalsupport.com).

\*Offer not available on insurance-related work.  
\*\*\$50.00 Maximum donation.

About U.S. Legal Support:  
U.S. Legal Support, Inc., founded in 1994, is a privately held company with over 40 offices located across the United States. As one of the leading providers of litigation services, we are the only litigation support company that provides court reporting, record retrieval, litigation, eDiscovery and trial services to major insurance companies, corporations and law firms nationwide.

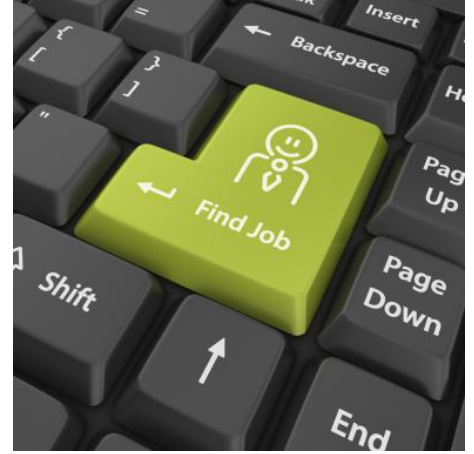
These changing times demand a commitment by those in the legal field to achieve the highest degree of excellence in every phase of personal and professional growth. Take a step in the right direction. Advance your legal career. Improve your professional and personal skills.  
**Become a Member of USL today!**

Established in 1934, Legal Secretaries, Incorporated, (LSI) is a nonprofit mutual benefit corporation organized for the purposes of providing educational, professional, and personal development programs to its members.



## 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!



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## Volunteers Needed!

West Valley College is looking for a member to serve on its Paralegal Advisory Board. Our very own Rod Cardinale, Jr., has served on the advisory board for the last several years but due to other commitments, he has decided to step down and offer the position to another SCCoLPA member.

Members include local attorneys, legal administrators, paralegals, and other legal professionals. The Advisory board meets twice a year to share ideas about what is happening in the workplace, what type of skills law firms are looking in potential employees, and to discuss ways to help the paralegal program stay current with the latest requirements in the legal field. It also reviews the program curriculum and provides feedback on any needed changes.



So, if you are interested in this position, please contact President Elise Dresser, CCLS, at [endresser@gmail.com](mailto:endresser@gmail.com) for more information.

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## Santa Clara County Legal Professionals Assoc.

# SUPPORT OUR mixedbag designs FUNDRAISER

We're selling tote bags, accessories, kitchenware & more through a Mixed Bag Designs fundraiser!

### IT'S EASY TO SUPPORT US - JUST SHOP ONLINE!

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- Make sure our ID# **604410** is at the top of the website before shopping.
- We receive 40% of every online purchase
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- **Questions?** Contact: [Elena Schneider @ eschneider@mcmmanislaw.com](mailto:eschneider@mcmmanislaw.com)

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**This fundraiser runs from October 11-November 8, 2016**





## PARALEGAL ASSOCIATION OF SANTA CLARA COUNTY

### TO ALL ATTORNEYS, PARALEGALS & OTHER LEGAL PROFESSIONALS:

DATE: Wednesday, November 9, 2016  
TIME: 12:00 – 1:30 PM (Lunch included!)  
TOPIC: The Ins and Outs of Real and Personal Property Taxes: (1 hour MCLE Credit)  
SPEAKER: Bill Snyder, CPA – Founding Partner at Shannon & Snyder  
LOCATION: Hilton Garden Inn, Mountain View – 840 E. El Camino Real, Mt. View, CA 94040

Mr. Bill Snyder will discuss the most efficient and cost effective way to assist clients with matters related to real and personal property transfers. Bill will provide a basic understanding of Step-up Basis; he will define Assessed Values versus Fair Market Values; and he will spend time discussing the change in ownership process through the County Assessor's offices, and how the Appeals Board process works, should it be necessary in reversing or rectifying a tax imperfection on a transfer.

Mr. Snyder and his partner at Shannon & Snyder have been providing quality, personalized tax and financial guidance since 1994. Bill is a Santa Clara University Alum, and is an active member of AICPA and CalCPA.

Bill is a Certified Public Accountant with a twist! By combining his expertise, experience and imagination, he has become a specialist in commercial and residential tax appeals for properties throughout California. During the collapse of the real estate market, Bill and his partner decided to offer property tax appeals services along with their full-service accounting, tax management and financial guidance. Bill handles all kinds of properties, including office, R&D, manufacturing, hotels, golf courses, shopping centers, service stations, and more.

- Objectives:
- 1 - Real Property Ownership Changes through the Assessor's Office
  - 2 - Understanding Step up Basis
  - 3 - Assessed Values versus Fair Market Values

PASCCO Member: \$26.00      PASCCO Student Member: \$23.00      Non-Member: \$30.00

Register online:

<https://www.eventbrite.com/e/the-ins-and-outs-of-real-and-personal-property-taxes-tickets-28866571693>

*PASCCO is a State Bar of California approved MCLE provider  
CLAE credit is approved by the National Association of Legal Assistants ("NALA")*



## PARALEGAL ASSOCIATION OF SANTA CLARA COUNTY

### TO ALL ATTORNEYS, PARALEGALS & OTHER LEGAL PROFESSIONALS:

DATE: November 17, 2016  
TIME: 6:00 pm – 8:00 pm  
TOPIC: Choosing a Fiduciary  
SPEAKER: [John W. Prokey, Esq.](#)  
LOCATION: [De Anza College](#) (Parking Fee: \$3.00)

As advisors, we are often asked to recommend a fiduciary. Selecting the best fiduciary can be a difficult task. This program will detail factors to consider when recommending or selecting a fiduciary. The program will also provide discussion on the types of services fiduciaries provide. The goal of the program is to allow advisors to be a better resource to clients and more successfully play matchmaker between clients and fiduciaries.

John W. Prokey is the Senior Managing Partner of Ramsbacher Prokey Leonard LLP. His law practice includes advising high-wealth individuals, families and closely-held business owners in tax, business and estate planning. He is a frequent lecturer and guest speaker at numerous tax planning seminars and conferences throughout California and elsewhere, and is a prolific author on various tax and estate planning topics.

Mr. Prokey is a member of the California State Bar and serves on the Taxation and Trusts and Estates Sections thereof. He also is a former member of the Taxation Section Executive Committee and the former Chair (2004-2005) of its Estate and Gift Tax Sub-Committee. Currently, John is a member of the Santa Clara County and American Bar Associations, the Santa Clara County Estate Planning Council, and the Silicon Valley Bar Association. He received his Baccalaureate of Science degree from Santa Clara University in 1994 and his Juris Doctor degree from Santa Clara University School of Law in 1999, graduating cum laude in both undergraduate and law school studies.

Objectives:

1. Enhanced understanding of the services provided by fiduciaries
2. Learn a paradigm for assessing fiduciaries
3. More effectively advise clients on selection of a fiduciary

PASCCO Member: \$25.00

PASCCO Student Member: \$23.00

Non-Member: \$35.00

Register online: <https://www.eventbrite.com/e/pascco-mcle-general-meeting-november-17th-choosing-a-fiduciary-tickets-28787882331>

*PASCCO is a State Bar of California approved MCLE provider; this seminar is approved for 1.0 MCLE Credit.  
CLE credit is approved by the National Association of Legal Assistants ("NALA")*

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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 2016-2017 are:

President  
Vice President - Membership  
Vice President - Marketing  
Executive Secretary  
Treasurer  
Governor  
Executive Advisor  
Parliamentarian

Elise Dresser, CCLS  
Shannon Quigley  
Sheryl Boardman  
Elizabeth Cameron, CCLS  
April Ignaitis, CCLS  
Linda Neuman  
Rod Cardinale, Jr.  
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

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## Contact Us

Santa Clara County Legal Professionals Association  
P.O. Box 90509  
San Jose, CA 95109  
[www.sccolpa.org](http://www.sccolpa.org)  
[www.facebook.com/sccolpa](https://www.facebook.com/sccolpa)

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