

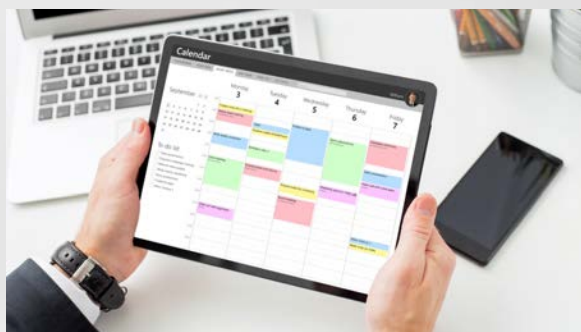


In This Issue

Your Legal Professional Planner is Ready!

Sacramento LPA has everything you need to complete your professional planner for the year. Whether it's education, networking, or filling your social calendar, check out all the things you have to choose from!

Page 17



Costa Mesa, Anyone? LPI's First Quarterly Educational Conference

"Under the Sea" is the theme for this conference, taking a "deep dive" into education, professional development, and networking.

Page 6

Have You Renewed Your Membership? What are You Waiting For?

Don't miss out! Make sure you get the member price for meetings, webinars, conferences, and more!



Page 7

Summer Court Series

This series of presentations from Superior Courts from all over the state is back by popular demand!



Page 5

ALSO IN THIS ISSUE

July Educational Event	Page 2
President's Message	Page 3
New Member Welcome	Page 7
Governor's Report	Page 8
LPI's 90th Annual Conference	Page 10
Legal Professional Planner	Page 17
Upcoming Education from LPI	Page 22
Sacramento LPA Committee Chairs and Executive Board	Page 24

SACRAMENTO LPA'S JULY 18TH EDUCATIONAL EVENT



SACRAMENTO
LEGAL PROFESSIONALS ASSOCIATION
www.saclpa.org

**JULY
EDUCATIONAL
PROGRAM &
DINNER MEETING**

July 18, 2024
Meet and Greet: 5:30 PM
Dinner: 6:15 PM
Educational Program: 6:45 - 7:45 PM

Black Bear Diner
2700 El Centro Road
Sacramento, CA 95833

**Calendaring 101:
Back to Basics**

Guest Speaker
Lynne Prescott, CCLS
Legal Education Instructor
Legal Professionals,
Incorporated

Registration Fee:
\$30 Members / \$35 Non-Members
(convenience fee applies for online payments)

Deadline to RSVP: Monday, June 10, 2024
(no refunds after this date)
Dinner Selections Available Upon Registering

This presentation is approved for CCLS
recertification credit in the amount of 1.0 hour.

To Register:
www.saclpa.org/events

Thank You to Our Vendor
Partner
RapidLegal®
Celebrating 30 Years
1994-2024

Get calendaring on your calendar and join us on July 18th at the Black Bear Diner in Natomas!

Calendaring is an essential task in any law office. No matter what practice area we work in, there are dates and deadlines we must keep track of. The consequences of missing a deadline can be dire. Missed deadlines make our law office look unprofessional. But much worse, they can cost our firm money, cost our client money, or even result in a permanent loss of a remedy for our client.

Calendaring the correct date is important because most deadlines are very unforgiving. We are either on time or we are not, and consequences for being late can be severe. Therefore, calendaring deadlines accurately deserves our undivided attention. It is one of the most basic, yet one of the most important ways to serve our clients well.

PRESIDENT'S MESSAGE

Dawn Forgeur, CCLS



Dear Members,

I hope this message finds you well and keeping cool as we move through this historically hot summer.

This past month has been particularly productive. We have planned out several upcoming educational programs and even have a few fun events in the works. Listening to member feedback, the upcoming educational programs will be geared more towards legal procedures, with topics like calendaring, law and motion, and writs of mandate. The list of the upcoming events is on our website and we will keep you updated through emails and social media.

Speaking of social media, Sacramento LPA has had a Facebook page for years, but it now has a LinkedIn presence! Please share with your colleagues.

Looking ahead, we have several exciting things planned. The Reno Bus Trip is once again scheduled to coincide with the Great Italian Festival in Reno and registration is live! Fairytale Town is an event where we dress up to hand out candy and do fun activities with the kids. This event will take place over two weekends in October, and we would love it if you could spare an evening or two to help out.

These endeavors are designed to further our mission and create even more impact in our community. Your involvement and feedback are crucial, and I encourage you to participate and share your ideas.

Thank you once again for your support.

Sincerely,

A handwritten signature in blue ink that reads "Dawn". The signature is written in a cursive, flowing style.

Dawn R. Forgeur, CCLS
President



Sacramento LPA Congratulates

Donna Day
LPI PRESIDENT 2024-2026



Embrace 
THE JOURNEY

SUMMER COURT SERIES

Members of Sacramento LPA can attend the entire series for FREE!!



2024 Summer COURT SERIES



June

Thursday, June 27 • **California Court of Appeals – “Demystifying Appeals with the Third Appellate District”**
Speakers: Colette Bruggman, Clerk/Executive Officer and Todd Eyster, Supervising Deputy Clerk

July

Thursday, July 11 • **San Mateo Superior Court**
Speakers: Emily Gomes, Criminal & Appeals Supervisor; Alessandra Robleto, Family Law & Probate Supervisor; and Rina Singh, Civil & Small Claims Supervisor

Thursday, July 18 • **Riverside Superior Court**
Speaker: Carrie Snuggs, Chief Deputy of Operations

Thursday, July 25 • **United States District Court, Southern District**
Speakers: Joe Diaz, CM/ECF Coordinator and Elizabeth “Liz” Sotelo, CM/ECF Specialist

August

Thursday, August 1 • **California Court of Appeals, First Appellate District**
Speaker: Beth Robbins, Assistant Clerk/Administrator

Thursday, August 8 • **Solano Superior Court**
Speaker: Sara MacCaughey, Assistant Court Executive Officer

Thursday, August 22 • **Alameda Superior Court**
Speaker: Clerk, Alameda Superior Court

Thursday, August 29 • **Bankruptcy Court Updates**
Speakers: Gary B. Randolph, Esq. and Kathleen A. Cashman-Kramer, Esq.

September

Thursday, September 5 • **Sacramento County Superior Court**
Speakers: Renee San Miguel, General Civil Unit and Elizabeth Macdonald, Law and Motion Unit

Thursday, September 19 • **Orange County Superior Court**
Speakers: Court Clerks from the Civil e-Filing Unit

LPI Members: FREE!
Non-LPI Members: \$55

Online Registration & Payment
LegalProfessionalsInc.org/Events



THURSDAYS 12:00 – 1:00 P.M.

EACH OF THESE WEBINARS ARE APPROVED FOR CALIFORNIA MINIMUM CONTINUING LEGAL EDUCATION (MCLE) CREDIT IN THE AMOUNT OF 1.0 CREDIT HOUR



TAKE A "DEEP DIVE" AT LPI'S QUARTERLY EDUCATIONAL CONFERENCE

Costa Mesa, Here We Come!



Legal Professionals, Incorporated
First Quarterly

Educational Conference

August 16-18, 2024

 **Hilton Orange County/Costa Mesa**
3050 Bristol Street
Costa Mesa, CA 92626
1-800-HILTONS

6 SEMINARS!*
Live & Via Zoom

Don't Wait!
REGISTER NOW!
www.legalprofessionalsinc.org/events

 **FIRSTLEGAL**
Joint Venture Partner

 **ESQUIRE**
Joint Venture Partner



Michelle Hererra, Esq.
Pillsbury Winthrop Shaw Pittman, LLP
**Federal Court Trials:
What to Do Before Trial**



Chaz Hales, Esq.
**Bitcoin, Block Chain, Crypto
Currencies, and the Law**



Debbye Rosenthal, Esq.
Law Office of Debrah Rosenthal, APC
**Surrogacy and Egg Donation 101:
The Basics of Art Contracts from
Match to Clearance**



Bethany Enszt, M.S.
U.C. San Diego Extension Paralegal Studies
2 Legal Technology Seminars!
**I Found It on the Internet, So It Must be
True: Ethical Obligations Using the
Internet in Your Case**
Professional Ethics



Alexander Carroll, Esq.
Pillsbury Winthrop Shaw Pittman, LLP
**State Court Trials:
What to Do Before Trial**

*MCLE and CCLS Credit Available

Conference Theme:
Take a Deep Dive WITH LPI



EDUCATION | PROFESSIONAL DEVELOPMENT | NETWORKING

MEMBERSHIP RENEWAL

Did You Forget Something?

We Miss You!

Hey, super legal professionals! There's a lot of you missing out there. Being a member of Sacramento LPA is one of the BEST things you can do for your career, as well as your personal and professional development. And don't forget that membership in Sacramento LPA automatically makes you a member of Legal Professional, Incorporated, so all of these great educational events you're seeing here are either FREE or significantly discounted with membership.



RENEW NOW!

<https://www.saclpa.org/members-only/membership-renewal/>

Welcome to Sacramento LPA's Newest Members!

Christa Barrera
Dulce Cermak
Janie Collier
Maggie Foley
Amber Krausse
Idalia Monique Stark
Lindsay Riley

Dawna Carson
Sandra Daniels
Nancy Garcia
Maren Padilla
Joanna Pelayo
Meridith Rogester
Nicole Thompson



GOVERNOR'S REPORT

Marci Frazier



I'm thrilled to share with you the highlights from our recent gathering in Newark, California, from May 16-19, 2024, where we celebrated a monumental milestone: LPI's 90th anniversary. The theme of the annual conference was "Aloha," a tribute to Hawaii's vibrant and festive culture.

Friday evening was an enchanting kickoff with lei-making activities and a Hawaiian-inspired street taco bar that set the tone for a memorable weekend. On Saturday morning, the Pre-Board of Governors Meeting began promptly at 8:02 a.m., where several important resolutions were passed:

- ☒ General sponsorship with Depos Solutions LLC, effective from April 1, 2024, to April 1, 2025, for \$5,000.
- ☒ Limited agreement with California Advocates Management Services, starting May 1, 2024, on a month-to-month basis for six months at \$1,000 per month.
- ☒ Updated price sheet for the LPI Education Council.
- ☒ LPI Proposed Standing Rule Amendment No. 1: Complete deletion of Standing Rule 10.
- ☒ LPI Proposed Standing Rule Amendment No. 2: Revision of Standing Rule 15.1 to replace "member" with "representative."

The first session was graced by Mary Lou Floyd, CCLS, CEC Coordinator of Mt. Diablo LPA, leading the Pledge of Allegiance. Vivian Shreve, CCLS, delivered a heartfelt reading of the Code of Ethics, honoring Joan M. Moore, PLS, CCLS, LSI President from 1980 to 1982. I had the honor of presenting a Memorial Address titled "Bearing the Unbearable," followed by a warm welcome from Lori Hunt, Esq., of Manfred & Hunt. Heather Edwards, CCLS, then brought energy to the room with a lively introduction of each Executive Committee member, set to the backdrop of Hawaiian music and adorned with leis.

(Continued on page 9)

GOVERNOR'S REPORT

Cont'd from Page

Donna Day delivered an inspiring Marketing Committee report, expressing gratitude to her team with thoughtful gifts. Donna highlighted a remarkable 34% increase in LPI membership during her tenure as Vice President, and awarded \$100 certificates to the associations with the highest membership growth. Sacramento LPA proudly received a certificate for achieving a 4% increase in 2023-24. Following various award presentations, the first session concluded, and attendees transitioned to an array of enriching educational opportunities.

Saturday night's banquet was a cultural feast and featured authentic Hawaiian dancing. We celebrated the Chapter Achievement awards, with Sacramento LPA narrowly trailing San Diego LPA by just 350 points. President Rod Cardinale, Jr., presented the Legacy Award posthumously to Jennifer L. Page, CCLS, whose husband, Tony Page, was there to accept on her behalf. The Rising Star award was presented to George Siambis of San Mateo County LPA. The coveted President's Award was presented to Heather Nowak of Orange County LPA. The evening continued with music, dancing, and networking.

On Sunday during the second session, Lynne Prescott, CCLS, delivered an emotional speech marking the end of her distinguished ten-year tenure on the Executive Committee. She was ceremoniously escorted to the Past Presidents' table by President Rod Cardinale, Jr., and Past President Heather Edwards, CCLS. President Rod Cardinale, Jr. gave a moving farewell address, followed by the grand 90th installation of officers. Lynne Prescott, CCLS, served as the installing officer. The new officers include:

Treasurer: Larry McGrew of San Francisco LPA, with Rod Cardinale, Jr., as marshal.

Secretary: Erika Garduno of Desert Palm LPA, with Heather Edwards, CCLS, as marshal.

Vice President: Bettina Jacobson of Placer County LPA, with Rod Cardinale, Jr., as marshal.

President: Donna Day of Alameda County LSA, with Mary Rocca, CCLS, as marshal.

Rod Cardinale, Jr., then presented to President Donna Day the president's pin, gavel, and perpetual silver cup, engraved with the names of past presidents as well as the newly installed president. Gifts to the outgoing president included a monetary contribution from LPI members, history books from LPI Historian Shannon Quigley, and a special gift from Alameda County presented by Mary Rocca, CCLS. The ceremony concluded with Lynne Prescott, CCLS, escorting Rod to the Past Presidents' table, and newly installed President Donna Day delivering a stirring speech titled "Embracing the Journey."

As we wrapped up, it was announced that LPI's 1st Quarterly Conference is scheduled for August 16-18, 2024, at the Hilton Costa Mesa in Costa Mesa, CA. Let's make 2024 a year of inspiration, innovation, and continued excellence!

Highlights from LPI's 90th Annual Conference of Delegates and Board of Governors Meeting May 17-19, 2024 Newark, California



Sacramento LPA was well represented at LPI's 90th Annual Conference!

Back Row (Left to Right): Marci Frazier; Michelle Welch; Launa Atkinson, CCLS;
Corene Brooks; Anne French; Ron Ackland; Pennie MacPherson; Crystal Rivera.
Front Row (Left to Right): Brenda Johnson, CCLS; Jan Ainsworth; Dawn Forgeur,
CCLS; Lynne Prescott, CCLS.

Kalman S. Zempleny II CCLS Celebration Luncheon at Annual Conference



A lovely table setting for
California's newest CCLSs



Brenda Johnson, CCLS,
Certifying Board Chair



Erika Garduno
LPI Treasurer



Larry McGrew
Incoming LPI Treasurer

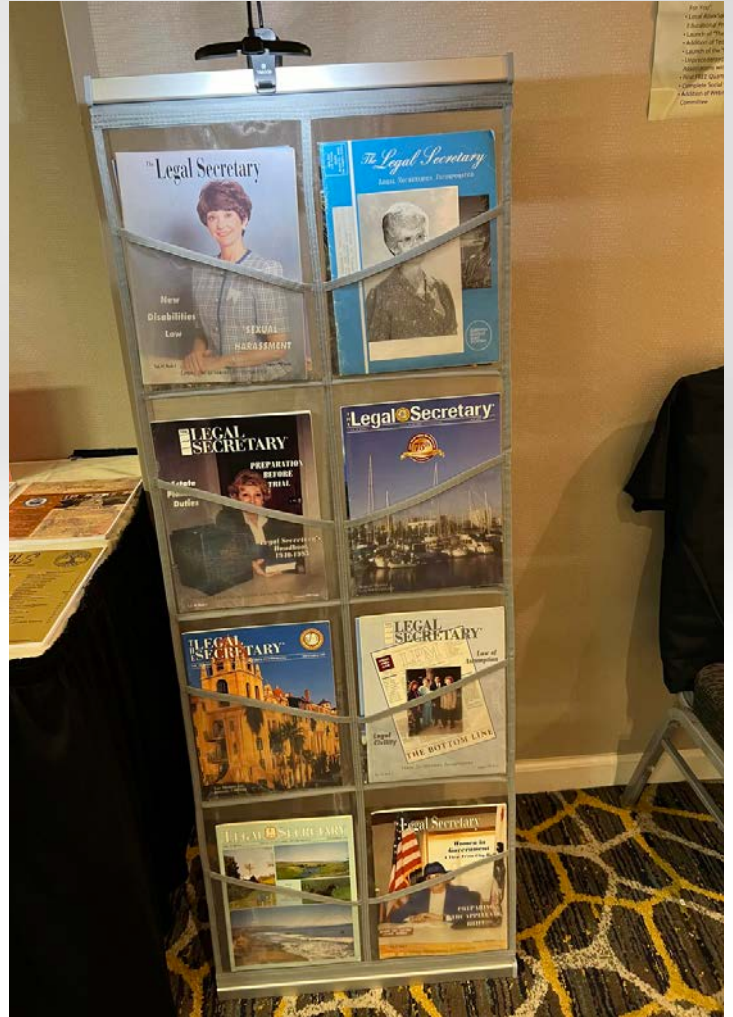


Bettina Jacobson
LPI Executive Secretary

The Legacy Project Pop-Up Museum



Legacy Project Curator Heather Edwards,
CCLS, LSI/LPI Past President 2018-2020



Above: History chronicled in
the archives of *The Legal Secretary*
magazine



Left: The latest in technology
(circa 1983)

The Legacy Project Pop-Up Museum



Exhibits and guest book table in the Legacy Room
(notice the white gloves for touching artifacts!)



LPI founder, Eula Mae Jett



So many history books - - So much history!

More Highlights!



Past President's ring presented to Rod Cardinale, Jr.



Ben Silowitz, Santa Clara County LPA, enjoying the conference!



The Speed Mentoring Workshop is definitely one of the highlights of attending Annual Conference!



LPI Executive Committee members having an "Aloha" moment!

More Highlights!



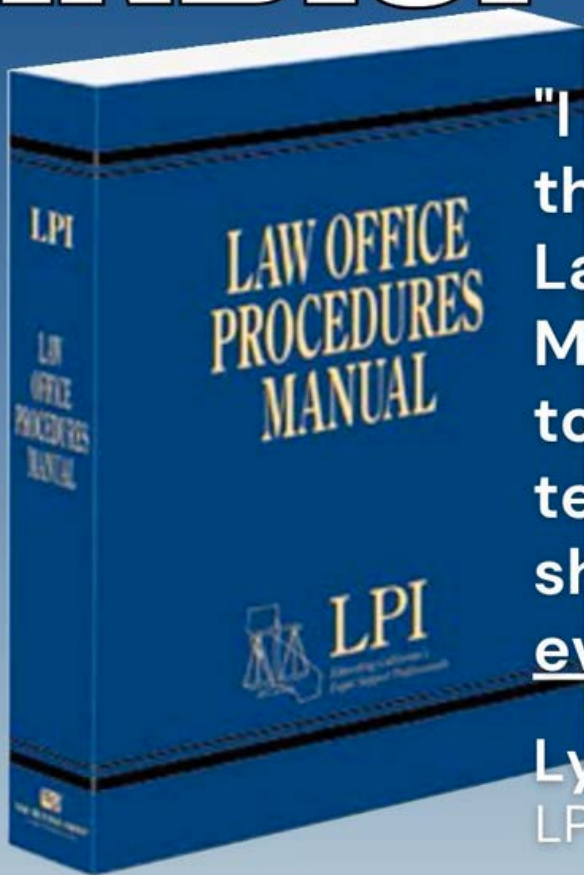
Presentation to LPI Past President Lynne Prescott, CCLS, by Sacramento LPA



LPI Past President Rod Cardinale, Jr., giving a big "Aloha" smile to the conference attendees

Aloha

INDISPENSABLE



"I am so excited to see the latest updates to the Law Office Procedures Manual and cannot wait to use it in the classes I teach. This publication should be in the hands of every legal professional!"

Lynne Prescott, CCLS
LPI Legal Education Instructor



Legal Professional Planner

Sacramento LPA has everything you need to complete your professional planner for the year. Whether it's education, networking, or filling your social calendar, check out all the things you have to choose from!

August 2024

Legal Professionals,
Incorporated, Presents



A Lunchtime Learning Live Webinar

Law & Motion (Part 1)

Speaker Provided by Sacramento Legal Professionals Association

This presentation will focus on the basics of law and motion practice and the required elements for successfully preparing and submitting motions with the court.

 August 20, 2024
12 Noon to 1 PM

\$20* Sacramento LPA/LPI Members
\$35* Non-Members

*Processing Fee Applies to Online Payments
Make Checks Payable to "SLPA" and Mail to:
Sacramento LPA
3053 Freeport Blvd., #244
Sacramento, CA 95828-4346

Last Day to Register: August 16, 2024
No Refunds After This Date



Speaker

Lynne Prescott, CCLS

Lynne is LPI's Legal Education Instructor, teaching the Intermediate and Advanced Legal Professionals Training Courses. She also teaches Sacramento LPA's Beginning Legal Professionals Training Course.

REGISTER

www.saclpa.org/events

This presentation is approved for California Minimum Continuing Legal Education (MCLE) credit in the amount of 10 credit hours and approved for CCLS recertification credit in the amount of 1.0 hour.

Legal Professional Planner

September 2024

September 19th Educational Program & Membership Meeting

Presentation by Sacramento County Superior Court: Update on the Court's Now Mandatory E-Filing System

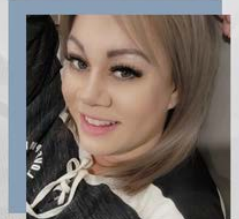


Presents

Sacramento County Superior Court: Update on the Court's Now Mandatory E-Filing System

Speaker Provided by Sacramento Legal Professionals Association

The Court's new civil e-filing system, launched in January 2024, is now mandatory. What can e-filers expect going forward? In this update from the Court, we will learn how the system is working, what issues have been identified, and what the Court anticipates for e-filing in the coming months. Bring your questions and bring feedback on your experiences with the new system.



Jessica Gable is the Supervising Courtroom Clerk, Civil Division, for Sacramento County Superior Court.

September 19, 2024

5:30 PM - Meet & Greet
6:15 PM - 6:45 PM Dinner
6:45 PM - 7:45 PM Educational Program

Black Bear Diner - 2700 El Centro Road
(off of I-80 and El Camino, next to the 49er Truck Stop)



Registration Fee:
\$30 Members
\$40 Non-Members

(convenience fee applies for online payments)

Deadline to RSVP:
Tuesday, Sept. 17, 2024 (no refunds after this date)

This presentation is approved for California Minimum Continuing Legal Education (MCLE) credit in the amount of 1.0 credit hours and approved for CCLS recertification credit in the amount of 1.0 hour.

Legal Professionals, Incorporated, Presents



A Lunchtime Learning Live Webinar

Law & Motion (Part 2)

Speaker Provided by Sacramento Legal Professionals Association

Law & Motion Part 2 will cover specific types of motions, how they differ, how they are used, and what is required when filing with the court.

September 10, 2024
12 Noon to 1 PM

\$20* Sacramento LPA/LPI Members
\$35* Non-Members

*Processing Fee Applies to Online Payments
Make Checks Payable to "SLPA" and Mail to:
Sacramento LPA
3053 Freeport Blvd., #244
Sacramento, CA 95828-4346

Last Day to Register: September 6, 2024
No Refunds After This Date



Speaker

Lynne Prescott, CCLS

Lynne is LPI's Legal Education Instructor, teaching the Intermediate and Advanced Legal Professionals Training Courses. She also teaches Sacramento LPA's Beginning Legal Professionals Training Course.

REGISTER
www.saclpa.org/events



This presentation is approved for California Minimum Continuing Legal Education (MCLE) credit in the amount of 1.0 credit hours and approved for CCLS recertification credit in the amount of 1.0 hour.

September 10th Lunchtime Learning Lesson

Part 2 of the Law & Motion Series
How certain motions differ, how they are used, and what's required when filing with the court.

Legal Professional Planner

October 2024



**Tickets Going On Sale
This Week!!!**

**SACRAMENTO LPA'S
RENO BUS TRIP!**

Stay Tuned!

October 12, 2024

October 17th Educational Program and Membership Meeting at Black Bear Diner



Topic: Writs of Mandate

Fairytale Town's Safe & Super Halloween Event

(2 Weekends in October)



Join Sacramento LPA in King Arthur's Castle as we give back to the community and the children of Sacramento during Halloween Season!

Legal Professional Planner

November 2024

Lunchtime Learning Lesson

November 12, 2024
Via Zoom



LPI Quarterly Educational Conference

November 15-17, 2024
Walnut Creek, CA



Sacramento LPA Friendsgiving Dinner

With so much to be thankful for, this gathering of friends is the perfect way to kick off the holiday season.

November 21, 2024

Black Bear Diner, Natomas



Legal Professional Planner

December 2024

Annual Mock Trial and Gift Exchange December 19, 2024



January 2025

Annual Court Updates Event



*January 16, 2025
Sacramento Hilton
Arden West*

Snapshot of Upcoming LPI Webinars and Multi-Week Courses

July 23, 2024	Word Styles	Legal Technology Webinar
July 29, 2024	Writ Procedures: Preparing & Lodging the Record	CLE Webinar*
July 30, 2024	Overview of Legal Research	Legal Research Webinar
August 6, 2024	Word and Adobe 911 Formatting Fixes	Legal Technology Webinar
August 7, 2024	Intermediate Legal Professionals Training Course	Multi-Week Training Course
August 7, 2024	Requesting Your Client's Medical Records	CLE Webinar*
August 20, 2024	Word: Formatting Pleadings & Discovery	Legal Technology Webinar
August 27, 2024	Internet Research	Legal Research Webinar

**Free to Sacramento LPA Members*



LPI's Executive Committee 2024-2025



Donna Day
President



Bettina Jacobson
Vice President



Erika Garduno
Executive Secretary



Larry McGrew
Treasurer



Rod Cardinale, Jr.
Executive Advisor



**90th Annual
Conference of Delegates
Board of Governors Meeting**



Elise Dresser, CCLS
Parliamentarian

Sacramento LPA's Committee Chairs for Fiscal Year 2024-2025

To learn more about an open committee chair position,
please contact President Dawn R. Forgeur, CCLS
at president@sacIPA.org.

Advertising/Vendor Liaison

OPEN

Bulletin Editor

Lynne Prescott, CCLS (Interim)

California Certified Legal Secretary (CCLS)

Brenda Johnson, CCLS

Charitable Projects

Rebecca M. Lerma, Chair

Annual Court Updates Event

Terry Olson

Brenda Johnson, CCLS

Employment

Kathy Rockenstein (employment@sacIPA.org)

Historian

OPEN

Legal Procedures

OPEN

Legal Professional Training

Lynne Prescott, CCLS

Brenda Johnson, CCLS



Marketing

OPEN

Membership

Brenda Johnson, CCLS(vicepresident@SacIPA.org)

Nominations & Elections

Lynne Prescott, CCLS

Professional Liaison

Dawn Willis (parliamentarian@SacIPA.org)

Programs/Reservations

Lynne Prescott, CCLS

Scholarship

OPEN

Ways & Means/Interclub

OPEN

Social Media/Website

OPEN

Special Committees

Fairytale Town – Crystal Rivera

Reno Bus Trip – Michelle Welch & Lynne Prescott,
CCLS

Sacramento LPA's Executive Board 2024-2025



Dawn Forgeur, CCLS
PRESIDENT



Brenda Johnson, CCLS
VICE PRESIDENT



Michelle Welch
SECRETARY



Ronald Ackland
TREASURER



Marci Frazier
GOVERNOR



Dawn Willis
PARLIAMENTARIAN



Lynne Prescott, CCLS
EXECUTIVE ADVISOR



Sacramento LPA and LPI: The One-Stop Shop for Your Legal Education and Training Needs

- Local Educational Events
- Basic, Intermediate, and Advanced Level Training
- Continuing Legal Education
- Legal Technology Training
- Professional and Career Development
- Group Discounts

www.legalprofessionalsinc.org

www.saclpa.org

Trusted

Celebrating over 90 years of educating California's legal support professionals, LPI and Sacramento LPA continue to serve the legal industry by providing quality, affordable programs and services to paralegals, secretaries, attorneys, and support staff at every level of development.

LPI is a State Bar approved MCLE provider.

Tested

Found in legal offices throughout California, LPI's *Law Office Procedures Manual* and *The Legal Professionals Handbook*, written and edited by legal professionals actively working in the legal field, are published by The Rutter Group and considered industry standard resources for legal procedure.

Contact Us!

info@saclpa.org

info@legalprofessionalsinc.org



LIVE & ON-DEMAND CLE WEBINARS

Presented by leading industry experts on current, relevant topics. Most offer MCLE/CCLS credit.



MULTI-WEEK COURSES

Trial Preparation, Discovery, Appellate & Federal Procedure, Beginning Legal Secretary Training, Intermediate & Advanced Legal Professional Training, Legal Research/Writing, Ethics.



LEGAL TECHNOLOGY TRAINING

Covers legal technology and software utilized by legal professionals at all levels. Meets State Bar requirements for technology compliance.



QUARTERLY SEMINARS

Live continuing education and technology training seminars at each LPI quarterly conference. Typically six workshops to choose from.



CERTIFICATION PROGRAM

California Certified Legal Secretary ("CCLS") certification is achieved by passing a comprehensive examination covering seven separate areas of law.