

# THE LEGAL EAGLE

## SACRAMENTO LEGAL PROFESSIONALS ASSOCIATION



**TECH SKILLS TRAINING  
WEBINAR**  
Speaker Provided by Sacramento Legal Professionals Association

**Copilot**  
Introduction to Microsoft Copilot for the Legal Professional

**July 2025  
9th**  
NOON TO 1:00 PM  
VIA ZOOM

**REGISTER NOW**

**Marni Beach**  
Legal Technology Trainer

Microsoft Copilot is an AI tool that acts as your digital personal assistant. Through a conversational chat interface, Copilot leverages generative artificial intelligence and large language models (LLM) to help save you valuable time by assisting you with a variety of everyday tasks. This class is designed to help you understand the basics of accessing and using Copilot and writing effective prompts.

**\$15 Sacramento LPA/LPI Members  
\$25 Non-Members**  
(Zoom link will be sent the day before)

**Last Day to Register: July 7, 2025**  
No Refunds After This Date

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

**SACRAMENTO**  
LEGAL PROFESSIONALS ASSOCIATION  
WWW.SACLPA.ORG

### JULY 9 LUNCH & ZOOM

Register now for a lunch and Zoom tech training webinar: "Introduction to Microsoft Copilot for the Legal Professional." Learn how this AI tool can boost your productivity with smart prompts and everyday task support.

Presented by legal tech trainer Marni Beach.

Approved for 1 hour MCLE/CCLS credit.

Register by July 7 at [www.saclpa.org](http://www.saclpa.org).



**STRAIGHT FROM THE BENCH**  
**SACRAMENTO SUPERIOR COURT'S LAW & MOTION DEPARTMENT**  
Speaker Provided by Sacramento Legal Professionals Association

**JULY 17, 2025**  
**BLACK BEAR DINER**  
5:30 PM - Meet & Greet  
6:15 PM - 6:45 PM Dinner  
6:45 - 7:45 PM - Educational Program

**REGISTER NOW**

**The Honorable  
Richard K. Sueyoshi**

**Registration Fee:**  
\$30 Members  
\$40 Non-Members  
Last Day to Register: July 15, 2025  
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.

**SACRAMENTO**  
LEGAL PROFESSIONALS ASSOCIATION  
WWW.SACLPA.ORG

### JULY 17 DINNER MEETING

Join us at Black Bear Diner for an in-person dinner meeting featuring Hon. Richard K. Sueyoshi from the Sacramento Superior Court's Law & Motion Department.

Approved for 1 hour MCLE/CCLS credit.

Register by July 15 at [www.saclpa.org](http://www.saclpa.org).

# PRESIDENT'S MESSAGE

Dawn R. Forgeur, CCLS

We're growing—and so are the ways we connect with you! I'm excited to share that we've expanded our online presence by launching an [Instagram](#) account and creating a [Discord](#) server just for legal professionals. These new platforms offer fun, fast, and interactive ways to stay in touch, share resources, and build community—so be sure to follow and join us!



Don't forget to visit [www.saclpa.org](http://www.saclpa.org) regularly to check out our calendar of events and explore current employment opportunities in the Sacramento area.

Thank you for being part of Sacramento Legal Professionals Association. Let's keep learning, connecting, and growing—together!

- July 9 – Lunch & Zoom with Marni Beach: “Introduction to Copilot for the Legal Professional”
- July 17 – Dinner Meeting with Judge Sueyoshi: Law and Motion
- August 21 – Dinner Meeting with Angelina Ray, President of the Sacramento County Bar Association
- September 18 – Dinner Meeting with Lauren Jones: “Estate Planning Misconceptions”

[SacLPA.org/events/](http://SacLPA.org/events/)





# Membership has its benefits!

As a member of Sacramento Legal Professionals Association, you are a member of Legal Professionals Incorporated, and are entitled to attend the Summer Court Series webinars for **free**! Register at [LegalProfessionalsInc.org](http://LegalProfessionalsInc.org)



## SUMMER COURT SERIES 2025

Thursdays 12 to 1 pm

### JUNE

- June 12 - San Diego County Superior Court
- June 26 - California Court of Appeal, Third Appellate District

### JULY

- July 10 - Napa County Superior Court
- July 24 - California Court of Appeal, First Appellate District
- July 31 - Contra Costa County Superior Court

### AUGUST

- August 7 - Riverside County Superior Court
- August 14 - U.S. District Court, Southern District of California
- August 21 - San Mateo County Superior Court
- August 28 - Sacramento County Superior Court

**Registration  
is now  
OPEN**

**More Dates  
to Come!**

*Do you have questions for the court clerks? Join us on the above dates when a clerk will provide information on their court process, procedures, and updates, followed by a Q&A session.*

**LPI Members: Free**  
**Non-LPI Members: \$55**

Online Registration & Payment  
[LegalProfessionalsInc.org/Events](http://LegalProfessionalsInc.org/Events)  
(or scan the QR Code)



Legal Professionals Incorporated is an approved provider and certifies that each webinar is approved for minimum continuing legal education (MCLE) credit in the amount of 1.0 hour by the State Bar of California, and is also approved for CCLS credit.





**LEGAL TECHNOLOGY TRAINING**



**Instructor:**  
**June Hunter**

June Hunter is a Technical Enablement Sr. Specialist at DISCO and teaches computer essentials at UC San Diego Division of Extended Studies in their ABA-approved Paralegal Studies program.

## MASTERING OUTLOOK

Essential Tips and Tricks for Legal Professionals

July 15, 2025 @ 12:00 PM

For more information or group registrations, please email: [training@legalprofessionalsinc.org](mailto:training@legalprofessionalsinc.org).

**\$55 for Non-Members**  
**\$25 for Members**




<https://www.legalprofessionalsinc.org/events/>

Unlock the full potential of Microsoft Outlook in your legal practice! This webinar is designed specifically for legal professionals looking to enhance productivity, streamline communication, and manage cases more efficiently. Join us to learn expert tips and time-saving tricks for email management, calendar organization, task tracking, and secure communication—all tailored to meet the unique demands of the legal industry. Whether you're new to Outlook or looking to sharpen your skills, this session will help you work smarter, not harder.

June Hunter is an affiliate of Legal Professionals, Incorporated, an approved provider, and certifies that this activity is approved for 1.0 hour of CCLS credit.


# PROBATE




**For Beginners**

Begin your journey into the probate field with our "Probate for Beginners" class.

This course provides a clear, step-by-step guide through the essential procedures of probate, from initiation to conclusion. This class will help you understand the basics, familiarize yourself with the fundamental concepts, and learn how to complete the initial documents.



**SATURDAY**  
**JULY 19, 2025**  
**10 AM TO 12 PM**




**Presented by: Carmen Vasques**

Carmen Vasques has worked as a legal professional for over 30 years. She began her career as a file clerk and translator in 1992 and joined the Law Offices of C. Kent Stephens in 2000, which later became Stephens & Stephens LLP, where she has worked for the past 25 years. During this time, she specialized in probate, estate planning, trust administration, civil, transaction, and business law.

**LPI Member - \$40 / Non-LPI Member - \$100**

To Register, go to our website:  
<https://www.legalprofessionalsinc.org/events>  
or scan the QR code.



LEGAL PROFESSIONALS, INC. IS AN APPROVED PROVIDER AND CERTIFIES THAT THIS SEMINAR IS APPROVED FOR 2 HOURS OF CCLS CREDIT; MCLE CREDIT IS NOT AVAILABLE.

### Legal Professionals Incorporated - Summer Court Series – Free for Members

Jul 10 Napa County Superior Court  
 Jul 24 California Court of Appeal, First Appellate District  
 Jul 31 Contra Costa County Superior Court  
 Aug 7 Riverside County Superior Court  
 Aug 14 U.S. District Court, Southern District of California  
 Aug 21 San Mateo County Superior Court  
 Aug 28 Sacramento County Superior Court

### Legal Professionals Incorporated - Legal Technology Training & University - Prices Vary

Jul 1 Overview of CA Discovery  
 Jul 1 Trial Preparation  
 Jul 8 Appellate Procedures in CA & The 9th Circuit Court of Appeals  
 Jul 8 Advanced Discovery  
 Jul 8 Mastering The Maze: Navigating the CA Rules of Court  
 Jul 16 Intermediate Legal Professional Training Series – Transactional Law

[LegalProfessionalsInc.org/events/](https://www.legalprofessionalsinc.org/events/)



# VENDOR SPOTLIGHT

## APTUS COURT REPORTING

Aptus is a full-service court reporting firm bringing the most talented and reliable court reporters to your case. When you partner with Aptus, you receive everything from online calendaring to deposition technology, as well as online storage for transcripts and exhibits. Our team is dedicated to being the best Court Reporting firm, and we're committed to delivering an unparalleled experience. Whatever your deposition needs call for, we have it covered.

Please contact Ashley Syvertsen Lopez for any of your court reporting needs!  
alopez@aptus.cr / 916-791-7008 / [www.aptus.cr](http://www.aptus.cr) / [scheduling@aptuscr.com](mailto:scheduling@aptuscr.com)

## UPDATED JUDICIAL COUNCIL FORMS

Here are some of the New and Revised Judicial Council forms, effective on July 1, 2025. The full list is at this link: [Latest Changes](#)



### **Adoption**

ADOPT-203\* New Stepparent Adoption Request

### **Civil**

CIV-050\* Rev. Statement of Damages (Personal Injury or Wrongful Death)

### **Criminal**

CR-101 Rev. Plea Form, With Explanations and Waiver of Rights—Felony

CR-110/JV-790 Rev. Order for Victim Restitution

CR-164\* New Retail Crime Restraining Order—Criminal (CLETS-RCO)

### **Decedents Estates**

DE-154/GC-035\* Rev. Request for Special Notice

### **Family Law**

FL-142 Rev. Schedule of Assets and Debts

FL-145 Rev. Form Interrogatories—Family Law



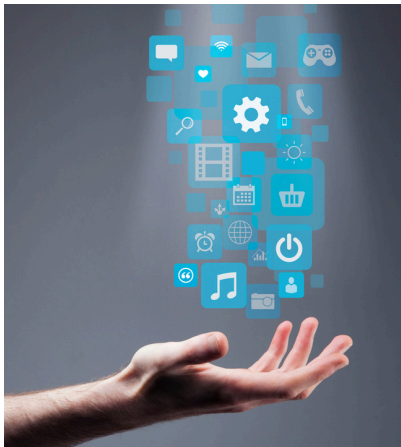


## VENDOR SPOTLIGHT

VERITEXT LEGAL SOLUTIONS

Veritext is the leader in deposition and litigation support solutions with a proven track record of industry excellence. For law firms and corporations, we provide coverage across all of North America, state-of-the-art conference rooms, facilitate the connection with highly skilled reporters and videographers, provide advanced technology, remote services, unparalleled client service, and on-time delivery. Our solutions utilize the latest easy-to-use technologies to streamline the deposition process, and reliably handle the most complex cases. All of this combined with unmatched data security (including HIPAA and PII compliance) ensure that Veritext clients have the best tools available and the confidence of working with the market leader.

Please contact Morgan Albanese for any of your court reporting needs!  
malbanese@veritext.com / 916-300-5184 / [www.veritext.com](http://www.veritext.com) / [calendar-sf@veritext.com](mailto:calendar-sf@veritext.com)



### JUNE EDUCATIONAL PROGRAM

#### **Beyond the Vault: Protecting Digital Assets in Estate Planning**

Lynne Prescott, CCLS presented the June educational program and taught us what digital assets are and why they matter.

What are digital assets? Digital assets are things such as: bank accounts, photos on your phone or social media, identities online, social media accounts, email accounts, cloud storage, etc.

What can go wrong without an estate plan. Your heirs could be locked out due to lack of passwords or legal access. Digital assets could be lost forever. There could be disputes among family members over access or control (i.e. social media accounts). Leaving digital assets unsecured could lead to exposure to fraud or theft.

What can you do now. Inventory all digital assets; include account names and URLs, along with usernames and passwords. Consider using a password manager such as Lastpass, 1Password, or Bitwarden. Decide if you want to have your social media accounts closed or put in a memorialized state.

What to think about. Consider appointing a digital executor who is a person designated to manage a decedent's digital assets and electronic communications according to your instructions. Do you want to transfer ownership of some assets and delete others? Do you want online contacts notified of your passing?

Digital assets are a real and evolving part of a person's legacy - do not ignore them!

## 2025 ANNUAL CONFERENCE

Tammy Hunt, CCLS  
Delegate

The LPI Annual Conference kicked off in high gear with a night of murder and mystery that took place on Friday night. The Murder at the Juice Joint had all the great aspects of fun and mystery with Notorious Nick Nemetz, the North Side Mob Boss, being killed at just the right moment when the lights went out... hmmm, who dunnit? There were numerous people who thought it was me (Southside Sal – Mob Boss of the South Side) or Nick's henchman, Mugsy Malone, played by one of the conference vendors. Well, after some time where all were able to ask questions to get more information to figure out who dunnit, pay for clues (aka bribery), and clues being found throughout the event, the whodunnit was solved by P.I. Pinkerton (aka June Hunter), and it turned out it was Cameron Rottier, the Police Chief (who was on the payroll of both Nick and Sal). Who woulda guessed? Fortunately, there were a few people that guessed who the murderer was, helped to apprehend the killer, and were rewarded with the Smoking Gun Award. Cast members included many members of LPI, as well as several of our vendors who joined in on the fun...and it was fun!

On Saturday, all of the usual business was conducted with officers and chairpersons providing their reports for the previous quarter. Some key take-aways include:

- Membership has increased slightly with nine associations having reported gains over the past year.
- Our publications have had a fabulous year with a total combined amount of revenue in the amount of \$79,787.11 (LOPM and LPH – hard copy and LPH online). The LOPM was just recently updated as well.

## The Murder at the Juice Joint had all the great aspects of fun and mystery ...

- Tammy Hunt, CCLS



Nikki Pacheco, Tammy Hunt, and Heather Edwards

- The Publications Revisions Committee will be swapping out Worker's Compensation for CEQA in the LPH.
- The educational seminars and webinars have raised over \$116,000 over the past year.
- Scholarships under the Eula Mae Jett Scholarship Program were awarded in all three categories.

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- The 2025-2026 LPI Officers were installed – Larry McGrew, Treasurer; Erika Garduño – Executive Secretary; Bettina Herrick-Jacobson – Vice President; and Donna Day – President. The installation was great and presented by the Installing Officer, Heather Edwards, CCLS, LSI/LPI Past President 2018 – 2020. Fun fact, Heather awarded the Rising Star award to Donna while Heather was President.



Linda Brown and Tammy Hunt

- President Donna Day, selected our very own Ron Ackland to receive this year's President's Award, which was well-deserved. Ron has made significant contributions to LPI in the area of social media, advertising, and publication. He currently serves as the Editor of The Legal Professional magazine that comes out on a quarterly basis.

The conference ended on Sunday with many thanks and gifts being given to President Donna Day, the 2025 Annual Conference Chairs, and a few tears were shed. The conference came to a close with the singing of our closing song "Til We Meet Again" that was led by Diana E. Estabrook, LSI Past President 1984-1986.

My thanks to President Dawn for asking me and allowing me to serve in the capacity of Delegate for SLPA at this conference.

## CONGRATULATIONS!



Congratulations to Ron Ackland, a dedicated member and current Treasurer of the Sacramento Legal Professionals Association, on receiving this year's President's Award, selected by Legal Professionals Incorporated (LPI) President Donna Day! This well-earned recognition honors Ron's significant contributions to LPI, particularly in social media, advertising, and publications. As the Editor of *The Legal Professional* magazine, Ron continues to showcase excellence and commitment in every issue. We're proud to have him as part of Sacramento Legal Professionals Association and celebrate this outstanding achievement!



## 2025 ANNUAL CONFERENCE

Lynne Prescott, CCLS  
Governor

Sacramento LPA was well represented at LPI's 91<sup>st</sup> Annual Conference of Delegates and Board of Governors Meeting in El Cajon, including President Dawn Forgeur, CCLS, Vice President Brenda Johnson, CCLS, Delegate Tammy Hunt, CCLS, Treasurer Ron Ackland, Leanne Ruesink, and yours truly,



Lynne Prescott, CCLS & Mike Lewis

In addition to attending the pre- and post-Board of Governors meetings, I had the pleasure of co-presenting at the Speed Mentoring event with Education Council Member Mike Lewis of San Francisco LPA on the topic of mentoring. On Saturday, I presented a workshop on State vs. Federal Court Calendaring. So many of our members are doing an incredible job of serving at the LPI level, and were heavily involved throughout the conference in various capacities. It makes me very proud to be a member of both Sacramento LPA and LPI.

LPI's next conference is being hosted by Santa Clara County LPA the weekend of August 8-10, 2025, in San Jose, just a couple of hours away. It would be great to see you there!

## APRIL EDUCATIONAL MEETING

### Who's Who in the Law Office, Tracey N. Perkins

This panel discussion featured Tracey Perkins (Recruiting Manager, Paralegal, and Instructor), along with panelists Elle Chaseton, Dawn Forgeur, CCLS, and Marci Frazier from Best Best & Krieger. Tracey aimed to clarify roles within legal offices and highlight essential skills for legal support staff in 2025 and beyond. Tracey explored the distinctions among paralegals, legal assistants, secretaries, and admin assistants in terms of duties, credentials, and required skills. Speakers also examined how responsibilities often blur in real practice and emphasized adaptability, especially in boutique firms.

Tracey also shared strategies for career growth—such as mentoring, continuing education, networking, and mastering tech tools. Market trends point to modest salary increases, hybrid work expectations, and a growing demand for tech-savvy, cross-functional legal staff. The event closed with a "Career Glow-Up Checklist" encouraging participants to know their role, build their brand, and be a proactive, indispensable part of their legal team.



You can reach Tracey at [tracey@roundhillsearch.com](mailto:tracey@roundhillsearch.com) or on [LinkedIn](#).

**Santa Clara County LPA**  
Presents  
**Legal Professionals Incorporated's**  
First Quarterly Conference  
AUGUST 8-10, 2025

**Dog Days of Summer!**

Complimentary SJC Airport Shuttle, Pet Friendly, Pool

**Individual Conference Pricing:**  
(Plus \$5.00 convenience fee)

EARLY BIRD CONFERENCE REGISTRATION - \$30.00 (\$40.00 after July 11, 2025)  
OPTIONAL FRIDAY NIGHT RECEPTION POOL PARTY - \$35.00  
(Includes Two (2) drink tickets provided by Jen Fairbank of Planet Depos)

**SATURDAY LUNCH BUFFET - \$50.00**  
(Must also choose the \$30.00/\$40.00 registration fee option)

**SATURDAY BANQUET BBQ BUFFET - \$75.00**  
**SUNDAY BREAKFAST BUFFET - \$40.00**

**FULL SCRIP - \$165.00**  
(Includes all of the above except for the Optional Friday Night Reception Pool Party)

**\*REGISTER HERE\***

Conference Co-Chairs: Vivian Shreve, CCLS & Elise Dresser, CCLS  
email: Presidents@SCCLPA.org  
website: www.sccclpa.org

**Holiday Inn**  
BY IHG  
1350 N. First Street  
San Jose, CA

Planet Depos  
LPI Joint Venture Partner

FIRSTLEGAL  
LPI Joint Venture Partner



**August 8-10, 2025**

**Holiday Inn San Jose - Silicon Valley**  
1350 North 1st Street  
San Jose, CA 95112

**First Quarterly Education Conference**  
**6 Seminars!**  
In Person & Via Zoom

**REGISTER NOW**

Enhance your insights, network with like-minded professionals, engage in inspirational sessions, and connect with industry experts.

**Seminars:**

- Saturday, August 9, 2025, 10:00 AM**  
"A Mindful Approach to Work-Life Balance in a 24/7 World"  
Keili Parmley, Human Resources Director, City of Milpitas
- Saturday, August 9, 2025, 11:00 AM**  
"Navigating Ethical Challenges in Employment Law: Staying on the Right Side"  
Jeanine DeBacker, Esq., McPharlin, Sprinkles & Thomas
- Saturday, August 9, 2025, 1:45 PM**  
"Differences Between Patent, Copyright, Trademark, and Trade Dress"  
Jeffrey Nail, Esq., Wilson Sonsini
- Saturday, August 9, 2025, 3:15 PM**  
"The Prop in the Digital Age: A Team Approach to Technology in the Courtroom"  
Lynne Prescott, CCLS, Messing Adam Jasmine & Shoro, LLP
- Saturday, August 9, 2025, 1:45 PM**  
"Managing Social Media Ethics Instagram, Facebook, Twitter, Snapchat, and More"  
Bethany Ensz, M.S., U.C. San Diego, Div. of Extended Studies
- Saturday, August 9, 2025, 3:15 PM**  
"Fee Agreement Essentials: Protecting Your Practice from Ethical and Legal Risks"

These seminars are approved for California Minimum Continuing Legal Education (MCLE) and CLE recertification credit, excluding ethics credit for the three ethical seminars in the amount of 2.0 hours each. To locate approved ethics seminars, visit the CLE website at www.cle.org.

Planet Depos  
Joint Venture Partner

FIRSTLEGAL  
Joint Venture Partner

## 1<sup>st</sup> Quarterly Conference - Education and Networking Legal Professionals Incorporated

### Legal Professional's Reference Guide

*California Edition*



**90LPI** LEGAL PROFESSIONALS INCORPORATED  
Providing California Legal Support Professionals

**Available on Amazon!**

Kickstart your legal career with the Legal Professional's Reference Guide, California Edition, a practical handbook tailored for new legal secretaries, practice assistants, and paralegals. This guide provides a solid foundation in essential office procedures, legal document preparation, court filing processes, and day-to-day responsibilities in a legal setting.

Packed with step-by-step instructions, the guide covers drafting professional correspondence, understanding court systems, managing court calendars, and mastering legal terminology through an extensive glossary. You'll also learn the importance of professionalism through sections on ethics, confidentiality, and proper conduct, along with key technology skills such as document management and e-filing.

To help you grow beyond the basics, the guide offers strategies for strong client communication, resolving conflicts, and managing expectations. It also points to career-building resources like continuing education, certifications, and networking opportunities—making it an indispensable tool for both new and aspiring legal professionals.





Lynne Prescott, CCLS, and Patty Miller, PLS, CCLS



Tanya Tate, Erika Garduño, June Hunter, Nikki Pacheco

## Legal Professionals Incorporated's 91<sup>st</sup> Annual Conference of Delegates and Board of Governors Meeting



Legal Professionals Incorporated Officers for FY 2025-2026 (from L to R): President Donna Day; Vice president Bettina Herrick-Jacobson; Executive Secretary Erika Garduño; and, Treasurer Larry McGrew



Heather Edwards, CCLS, Winner of the 2024-2025 Legacy Award