

### SACRAMENTO LEGAL SECRETARIES ASSOCIATION

# THE LEGAL EAGLE

VOLUME 8 BOOK 9 AUGUST 2009



Sacramento Legal Secretaries Association

# VISIT OUR WEB SITE: WWW.SLSA.ORG

#### **PRESIDENT**

Jennifer Rotz Murphy Austin Adams Schoenfeld LLP 304 "S" Street Sacramento, CA 95811 (916) 329-3139 president@slsa.org

### **BULLETIN EDITOR**

Cassandra Baines Downey Brand, LLP 621 Capitol Mall, 18th Floor Sacramento, CA 95814 (916) 444-1000 cbaines@downeybrand.com

### MISSION STATEMENT

The Sacramento Legal Secretaries Association ("SLSA") is a nonprofit, educational organization whose purpose is to further knowledge of law and its procedures, promote a high standard of ethics, encourage a statewide networking system, and advance the interests of our members and the legal community.

NON-MEMBERS ARE WELCOME!

### AUGUST DINNER MEETING

Date: August 20, 2009

Time: 5:30 p.m. - 6:15 p.m. Meet & Greet

6:15 p.m. - 8:00 p.m. Dinner Meeting & Speaker

Place: Casa Garden Restaurant

2760 Sutterville Road, Sacramento, (916) 452-2809

Speaker: Todd Vlaanderen

California Secretary of State's Office, Legal Department

President, Sacramento County Bar Association

Topic: What's New with the Sacramento County Bar

Association and California Notary Law

Cost: \$25\* - SLSA Members; \$29\* - Non-Members

Vendor of the Month: On the Dotted Line...Notary Public Education

Services

\* Please add \$3 for reservations received after August 14, 2009.

\*\*\* Cancellations must be made 48 hours in advance for refunds. No shows will be billed. \*\*\*

RSVP: Jennifer Shelton

c/o Murphy Austin Adams Schoenfeld LLP

304 "S" Street

Sacramento, CA 95811

(916) 329-3104 phone; (916) 503-4000 fax

E-mail: jshelton@murphyaustin.com

(See Page 25 of this bulletin for Reservation Form and menu selections.)

Sacramento Legal Secretaries Association, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 0.5 hours.

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# EDITOR'S NOTE by Cassandra Baines

The Legal Eagle welcomes letters and article suggestions from readers. Please send them to: Cassandra Baines, 621 Capitol Mall, 18th Floor, Sacramento, CA 95814 or chaines@downeybrand.com.

The Sacramento Legal Secretaries Association reserves the right to edit articles and letters sent in for publication. The deadline for all submittals is the Monday after the general meeting of the month preceding the month of publication. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is distributed with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If legal advice or other expert assistance is required, the service of a competent, professional person should be sought.

The opinions expressed in the articles published herein are those of the individuals submitting the articles and not necessarily the views of the board or editorial staff. This publication may not be reproduced in whole or in part without the express written consent of the board of the Sacramento Legal Secretaries Association.

"WE GET TO MAKE A LIVING; WE GIVE TO MAKE A LIFE."

~ WINSTON CHURCHILL

Volume 8 Book 9 PAGE 3

# PRESIDENT'S MESSAGE by Jennifer Rotz

If you are a Notary Public, have ever considered becoming one, or work with notaries, you will not want to miss the August Dinner Meeting on August 20 at the Casa Garden Restaurant. I am excited to report that Sacramento attorney and Vice President of the Sacramento County Bar Association Todd Vlaanderen will be joining us to talk about "What's New with the Sacramento County Bar Association and California Notary Law." Attendees will enjoy a great presentation on the latest happenings at the SCBA and updates on California law regarding notaries. We will also be joined by On the Dotted Line... Notary Public Education Services, who will serve as our Vendor of the Month. Sabra from On the Dotted Line... will be discussing the ways in which her company assists existing notaries and those wanting to become notaries by providing the education now required by law.

Also at the August Dinner Meeting, we will be announcing the winners of the Boss of the Year and Legal Professional of the Year contests. The winners will receive their prizes and well deserved recognition. If you have not already done so, please submit your nominations for the contests. The more entries we receive, the livelier the competition will be. Please remember that these contests are not limited to SLSA members. Pass the flyers out to your friends and coworkers. I encourage you to also post the flyers in a common area at your firm, such as a break room. As always, we need your participation to make this a great, fun-filled event. Be

The August Lunch Lesson will feature Pamela K. Jansz, who is the Docket Clerk / Trainer for Seyfarth Shaw. Ms. Jansz will be going over "Master Calendaring." The lunch lesson will take place on August 13 at McDonough Holland & Allen PC.

We will wrap up our summer by offering yet another opportunity for members to help distribute food to needy families. We will once again be assisting the Sacramento Food Bank and Family Services at a church on Del Paso Boulevard. We are doing this on the last Saturday of every month because many of those that have participated have enjoyed it tremendously and have expressed the desire to do it on a regular basis. SLSA does not make a donation, monetary or otherwise. We simply show up, if and when we can, to help distribute groceries to the needy. If you would like to help out one Saturday, please contact Elicia Allen, CCLS, for more information.

"I HAVE LEARNED THAT SUCCESS IS TO BE MEASURED NOT SO MUCH BY THE POSITION THAT ONE HAS REACHED IN LIFE AS BY THE **OBSTACLES WHICH** HE HAS OVERCOME WHILE TRYING TO SUCCEED."

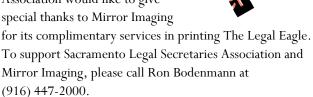
> BOOKER T. WASHINGTON

[Continued on Page 5]

sure to join us!

# **Support our Advertisers!**

Sacramento Legal Secretaries Association would like to give



#### ADVERTISERS

- Page 8 First Legal Network
- Page 23 Lightspeed Messenger
- Page 32 The Rutter Group
- Page 39 Crucial Times Courier Inc.
- Page 44 Mirror Imaging

Page 4 The Legal Eagle



# $SPEAKER\ SPOTLIGHT\ \ by\ Rhonda\ Harrigan$

Charity Kenyon, a Sacramento attorney, was the speaker for the July Dinner Meeting and the topic was "When the Newspaper Reporter Calls: Careful What You Wish For."

Charity Kenyon emphasizes appellate law, news media law and state and local public contract disputes. Ms. Kenyon is included in Northern California Super Lawyers and The Best Lawyers in America, First Amendment Law and Appellate Law. An elected member of the California Academy of Appellate Lawyers serving as its 2008-09 President, Ms. Kenyon's emphasis is on appellate advocacy, with primary or sole responsibility for more than 130 appeals and writs, including more than thirty published decisions. She is the lawyer member of the Third Appellate District's Mediation Committee, and member of the Third Appellate District's appellate mediation panel. She earned her J.D. from the University of California, Davis School of Law. She was the media liaison attorney for the preliminary hearing and pretrial motions in the Scott Peterson case, and also for the Unabomb trial in Sacramento. She has been active in the Sacramento County Superior Court Bench Bar Media committee for more that 25 years and helped establish the new bench bar media committee in Yolo County last year after the court shut the public out of a hearing without notice. She represents the Sacramento Bee, the Davis Enterprise, and other smaller northern California papers, as well as KXTV and KOVR-TV.

Ms. Kenyon covered discussing your case with the news media, trying to get a newspaper reporter to be a witness or to provide documents, trying to keep reporters from seeing records that have been filed or from attending hearings scheduled in your matter, and, keeping cameras out of the courtroom during your trial.

SLSA appreciates Ms. Kenyon taking time out of her busy schedule to give such interesting and educational information to our membership.

"A PERSON'S TRUE WEALTH IS THE GOOD HE OR SHE DOES IN THE WORLD."

~ Mohammed

# VENDOR SPOTLIGHT by Alissa Mackrill

First Legal Support Services was our July Dinner Meeting Vendor. First Legal Services has provided an array of services to communities in California, Arizona, Nevada, and New York for more than 24 years. They are pleased to help you with court filings, fax filings, e-filings, court research, service of process, and messenger services. In addition to the many legal support services that they provide they also provide investigations and reprographics.

Jim Pinter, the account executive of First Legal Support Services, joined the First Legal Network last summer after representing many companies in the pharmaceutical and biotech industries. Jim is very excited to be working in this demanding and interesting field as First Legal's Account Executive for the Sacramento Territory.

Jim's contact information can be found on Page 8 of this bulletin. Please support SLSA by supporting its vendor sponsors; consider Jim and First Legal Support Services for your filing needs.



### President's Message (Continued)

LSI will be holding its first quarterly conference in Palm Springs, California from August 14-16. Attendance at conference is not limited to LSI or SLSA members. Conferences are open to everyone interested in networking and continuing legal education. To learn more or to register, please visit the events page of our website at www.slsa.org.

We have noticed a significant drop in attendance at our dinner meetings during the past few months. While we understand that people vacation during the summer months and, for some, the current state of the economy has had a negative impact on the pocket book, I must take a moment to express the importance of member attendance at our dinner meetings. Dinner meetings are held monthly as required by our bylaws. We are a non-profit organization that is required to conduct certain business with its members on a monthly basis. We work hard to make those monthly dinner meetings both educational and enjoyable for both members and guests alike. We work hard to hold those monthly dinner meetings at a restaurant that provides a welcoming environment and great food. We regularly welcome and incorporate your feedback regarding dinner meetings and bring topics and speakers to you according to your requests.

We are required by our bylaws to have a certain numbers of members present in order to conduct business. This is called having a "quorum." We are also required by the Casa Garden Restaurant to have a certain number of people present, and the association must pay for that certain number of people, regardless of whether that minimum has been met or not. When we do not have a quorum, we cannot conduct business. When we do not have the minimum number of people the restaurant requires present, the association loses money. Such has been the case in these past summer months.

SLSA's purpose is to provide networking and educational opportunities to our members, not to make money. However, it is important that we take care not to lose money so that we can continue to carry out our mission. I encourage you to help us do so by attending our events. A lot of work goes into bringing these events to you and it is always done with the hope that you will take advantage of and benefit from the opportunities we provide.

If you have any ideas, topic suggestions, or feedback of any kind, please do not hesitate to contact me or any other member of the board. We are here for you. Let us come together to make this a successful year for SLSA!



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## MEMBER NEWS by Jennifer Rotz

**Marni Beach** has accepted a position with Stoel Rives LLP as trainer for their California offices. Congratulations, Marni, and best wishes for your continued success!

**Kathy DeLisle** has relocated to Rhode Island. While we will miss her greatly, we are excited for her and wish her nothing but the best. Congratulations on your move, Kathy!

**Gloriela Garcia** is on maternity leave effective July 13, 2009 through September 14, 2009. Best wishes, Gloriela. Please keep us informed!

**Aaliyah Muhammad** was accepted to participate in the Women's Policy Institute in the area of Criminal Justice. Congratulations, Aaliyah!

Are you an SLSA member who has changed jobs? Been promoted? Recently engaged or married? New addition to the family? We want to know about you. Let us celebrate your accomplishments with you during good times and show you our support during tough times. Please send your news to president@slsa.org.

### MEMBERSHIP RENEWALS



### To: Members of the Sacramento Legal Secretaries Association

This is a friendly reminder that we have entered the fiscal year May 2009 through April 2010. Our annual membership dues were due on May 1, 2009. A \$5 late fee will be charged after June 1, 2009. Your bulletin subscription and membership benefits will not be interrupted until June 1. If you plan on renewing your membership, and we hope you do, please fill out a membership renewal form, which can be found in this bulletin and on our website at <a href="https://www.slsa.org">www.slsa.org</a>, and mail it to our 2009-2010 Treasurer, Debbie Frias, CCLS.

Debbie Frias, CCLS c/o The Crow Law Firm 700 E Street Sacramento CA 95814

e-mail: dfrias@crowlaw.com

SLSA thanks you for your continued support!

# August 2009

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12 Board Mtg.	13	14 LSI 2009 Conf.	15 LSI 2009 Conf.
16 LSI 2009 Conf.	17	18	19	20 SLSA Dinner Mtg.	21	22
23	24 Legal Eagle deadline	25	26	27	28	29 Sac. Food Bank
30	31					

### **DATES TO REMEMBER**

- August 12 SLSA August Board Meeting
- August 14-16 LSI August 2009 Conference
- August 20 SLSA Dinner Meeting
- August 25 Last Day to Submit Articles for the September issue of *The Legal Eagle*
- August 29 Sacramento Food Bank
- August 31 CCLS Study Course (Last Day to Register)
- September 9- SLSA Board Meeting
- September 17 SLSA Dinner Meeting

### Code of Ethics

### Legal Secretaries, Incorporated

It shall be the duty of each Member of the Legal Secretaries, Incorporated to observe all laws, rules, and regulations now and 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 Joan Moore, PLS

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# HAPPY "AUGUST" BIRTHDAY!



- Marve Breech, CCLS -- August 10
- Patti Alexander -- August 11
- Sandy Machado -- August 13
- Wanda Faye Portman -- August 14
- Marni Beach -- August 24
- Monica Parra -- August 26
- Ann Barner -- August 27
- Sheila D. Brown -- August 27
- Lois A. Greene -- August 30



# Support Services Investigations Reprographics

C: 916.281.1292 www.firstlegalnetwork.com jpinter@firstlegalsupport.com

# PICTURES









# LEGAL SECRETARIES, INCORPORATED $\sim$ ORDER FORM

ITEM	UNIT PRICE	QUANTITY	TOTAL
BRASS TACKS* A guide instructing local officers and chairmen on how to perform	\$ 5.00		S
their respective duties. Contains check lists, calendars and forms. (Rev. 5/06)			
CAREER PROMOTION/SCHOLARSHIP NOT JUST A SECRETARY	5 00		
BOOKLET A 26-page booklet designed to assist local associations in promoting the			VIII
career of legal secretary. Includes handout materials and an outline for use at career and			-
scholarship promotion events. (Rev. 2/98)			
CCLS BROCHURE Tri-fold brochure promoting the benefits of taking the CCLS	N/C		
Exam. Includes tear-off to request application form and information kit. (Rev. 2/08)			
CCLS MOCK EXAM 2006 Sample questions and answers to assist in preparing for all sections of the CCLS Exam.	20.00		
CCLS PIN A ½" high, 10-karat gold pin with CCLS logo. For the CCLS.	26.00		
	35.00		
CCLS STUDY KIT Contains Mock Exam (see above), Gregg Reference Manual with Basic and Comprehensive Worksheets and Instructor's Resource Manual.	120.00		
GUIDELINES FOR HOSTING LSI CONFERENCES* An instruction guide,	N/C		
including forms and samples, essential to any association considering a bid to host an			
LSI Conference. (Rev. 2/08)			
GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL	5.00		
PROGRAM A 34-page guide, with sample forms, to assist with the planning and			
execution of a successful legal educational program. (Rev. 8/03)			
HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND	5 00		
GUIDELINES* A booklet with step-by-step directions, including rules and			
examples, for preparing a History Book for entry in the LSI History Book Competition.			
Created for local association historians and/or presidents. (Rev. 11/05)			
HISTORY OF LEGAL SECRETARIES, INCORPORATED A 50-page memory	5.00		
of people, places and events since 1929. (Rev. 2/06)			
LAW OFFICE PROCEDURES MANUAL FLYER An 8 ½" x 11" advertisement	N/C		
of the LOPM. Includes listing of contents and Order Form. (Rev. 1/02)			<u> </u>
LAW OFFICE PROCEDURES MANUAL INSTRUCTOR'S GUIDES To assist			
instructors in conducting training classes Teacher Training Chapter offers tips for teaching. Other Guides supplement Chapters of the LOPM and contain projects,			
instructions to student, completed and blank legal forms, exams and answer keys.			
TEACHER TRAINING CHAPTER (Rev. 9/07)	4.00		<u> </u>
ADOPTIONS CHAPTER (Rev. 9/07)	7.00		
CIVIL PROCEDURE CHAPTER (Rev. 9/07)	7.00		<b> </b>
- ` <u>`                                 </u>			
CONSERVATORSHIP CHAPTER (Rev. 9/07)	7.00		ļ
CORPORATIONS CHAPTER (Rev. 9/07)	7.00		
COURT STRUCTURE CHAPTER (Rev. 9/07)	7.00		<u></u>
CRIMINAL LAW CHAPTER (Rev. 9/07)	7.00		ļ
DISCOVERY CHAPTER (Rev. 9/07)	7.00	****	
FAMILY LAW CHAPTER (Rev. 9/07)	7.00		
PROBATE CHAPTER (Rev. 9/07)	7.00		
REAL ESTATE CHAPTER (Rev. 9/07)	7.00		
UNLAWFUL DETAINER CHAPTER (Rev. 9/07)	7.00		
WORKERS' COMPENSATION CHAPTER (Rev. 9/07)	7.00		
MISCELLANEOUS CHAPTER (Rev. 9/07)	7.00	***************************************	
LEGAL SECRETARY'S REFERENCE GUIDE A legal procedure guide designed	30.00		
to assist local associations in conducting a training class. Also useful for training office			İ
personnel and as a general reference for experienced staff. (Rev. 4/07)			
	TOTAL THIS	PAGE	S

### LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

LSI BYLAWS AND STANDING RULES\* As currently adopted by the LSI

UNIT PRICE

5 00

QUANTITY

TOTAL

LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER An 8 ½" x 11"	N/C		
advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/02)  LSI LEGAL SPECIALIZATION SECTIONS BROCHURE Lists Sections offered	NIC.		
and reasons for joining. Includes Section Membership Application. (Rev. 2/08)	N/C		
LSI MEMBERSHIP BROCHURE Tri-fold brochure, extolling the advantages of	N/C		
LSI membership and programs. Contains request for membership application. (Rev.	***************************************		
2/08)			
LSI MEMBERSHIP PIN* A ¼" high oval gold-tone pin with blue and white enamel	3.00		
overlay. LSI logo in center and "Legal Secretaries, Incorporated" inscribed on circumference. For all LSI members.	******		
LSI ROSTER* Booklet with current listing of LSI officers, chairmen, past-	N/C	ļ	
presidents, honorary members, scheduled conferences, local association presidents and	I IV/C		
governors.			
MEMBERSHIP APPLICATION FORM* An 8 ½" x 11" form adopted 5/01 by	N/C	□ E-mail	
LSI for use by all local associations. Includes request for Legal Specialization Sections	*****	ì	***
information Local associations may add second-page for supplemental information	*******	-01-	
(Rev. 5/08) Can be transmitted as an e-mail attachment (Word format), if so requested.		☐ Printed	
NEW MEMBER PACKET* A 2-pocket folder containing letter from LSI President,	N/C		
LSI membership information, Specialization Sections Membership Application, list of			***************************************
benefits and providers, CCLS information, Legal Professional's and Law Office Procedures Manual flyer and Code of Ethics Local associations may insert additional	***************************************	}	***
material. For new local association members only.			
PRESIDENT'S PENDANT* A 1" high oval gold-tone pendant with blue and white	7.00		
enamel overlay LSI logo in center and "Legal Secretaries Association" inscribed on			***************************************
circumference. Eye for necklace chain on back. For local association presidents.	i		vones
PRESIDENT'S PIN* Same as pendant (see above), but with pin on back.	7.00		
	TOTAL THIS	PAGE	\$
TOTAL	PREVIOUS PA	GE +	\$
	TOTAL ORD	ER =	\$
CALIFORNIA SALES TAX (7.25% O	F TOTAL ORD	ER) +	\$
MAILING/SHIPPING AND HANDLING (15% O	F TOTAL ORD	ER) +	\$
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PLEASE LIMIT THE QUANTITIES OF NO-CHARGE ITEMS ORDERED TO MINIMAL	IMMEDIATE RI	QUIREMENTS	COMPLETE
PAYMENT INFORMATION BELOW AND MAIL COMPLETED ORDER FORM TO	D LEGAL SECR	ETARIES, INC	ORPORATED,
CORPORATE OFFICE, P O BOX 660, FORTUNA, CA 95540-0660; OR, FAX TO (			
INFORMATION MUST BE INCLUDED ORDER WILL BE MAILED OR SHIPPED WAVAILABILITY	TIHIN TO DAYS	OF RECEIPT,	SOBJECT TO
DELIVER TO: NAME AS	SOCIATION		
ADDRESS CITY	STATE	ZIP	
DAY TELEPHONE ( ) E-MAIL			
Method of Payment: Check, payable to "LSI," enclosed	VISA	MASTE	RCARD [
Method of Payment: Check, payable to "LSI," enclosed Credit Card Information: Number Expiration	n Date: Month	Ye	ear
Name on Credit Card: Card Verification Number			
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STALL BE REPLACED IMMEDIATELY BY CASH, A CERTIFIED CHECK OR MONEY ORDER PO \$25 PENALTY. PLUS THE ACTUAL COST CHARGED LSI BY THE FINANCIAL INSTITUTION FOR F			

\*Item available to LSI members only.

(Prices effective 0508)

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## EMPLOYMENT REPORT/POSITIONS AVAILABLE by Cyrene Farrell



At this time, SLSA has not received any employment opportunities to share with you. Please check back next month.

# CHARITABLE PROJECTS by Dawn Willis



SLSA helps Sacramento Food Bank & Family Services Mobile Food Distribution

On the last Saturday of July, my friend Pam and I joined Elicia Allen, Terry Olson-Skeahan (who brought her daughter Amber) and Micky Kelly in helping Sacramento Food Bank & Family Services distribute food at the Del Paso Baptist Church. When we showed up at 8:00 a.m., we immediately joined in to help set up the distribution stations. We then started bagging produce and then handing out the food as the clients came through the distribution line. It was a very pleasant and peaceful opportunity to help the homeless and low-income families in the area. When Pam and I left later that morning, we both felt a great sense of accomplishment and pride in helping those less fortunate. This was a true wake-up call to the opportunities that are available and the volume of commitment of business/grocery owners in the Sacramento area to help those in need. I have been recommending this adventure to all in my firm and highly encourage more SLSA members to join us in August. This was a

PERFECT and GREAT way to spend a Saturday morning.

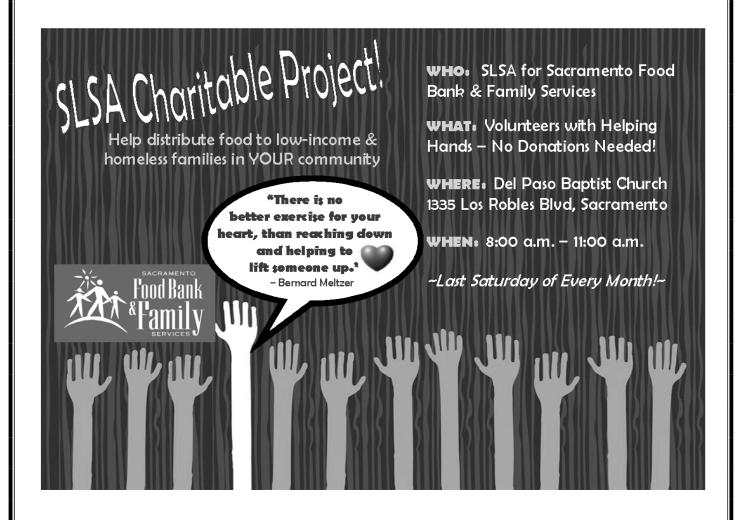
# GOVERNOR'S REPORT by Elicia Allen, CCLS



LSI's 1st Quarterly Conference is right around the corner, specifically August 14 – 16, 2009 in Palm Springs, hosted by Desert Palm Legal Professionals Association. I have received and reviewed the Official Notice from LSI and there appear to be no motions that will be presented at the general assembly. Should you be interested in reviewing the Official Notice, it has been posted at the LSI website at www.lsi.org. In addition to the Official Notice, you can also find the Legal Specialization Section Workshop Registration Form. As always, a number of great topics will be presented during the weekend. I am very excited to attend the "Unlawful Detainer – From the Day You Don't Pay to the Day You Go Away" workshop being presented on

Friday evening. I am so happy to report that in addition to your board conference regulars, pursuant to SLSA Standing Rule 26, SLSA member Desiree Delonia, CCLS will be attending to further her professional knowledge and growth. A fun and educational weekend will be had by all. Please look for my post conference report in next month's bulletin.

Additionally, I want to remind all members to submit your Chapter Achievement Reporting forms to me. This form can be found in this bulletin. Please make sure to take a look at the reporting form to see if you have earned SLSA points. Should you ever have any questions regarding earning and/or reporting Chapter Achievement Points, please contact me.



# Legal Secretaries, Incorporated LEGAL SPECIALIZATION SECTIONS

CIVIL LITIGATION
CRIMINAL LAW
FAMILY LAW
LAW OFFICE ADMINISTRATION
PROBATE/ESTATE PLANNING
TRANSACTIONAL LAW



# ARE YOU A MEMBER OF THE LEGAL SPECIALIZATION SECTIONS?

# IF NOT, HERE ARE TEN GREAT REASONS WHY YOU SHOULD BECOME A SECTION MEMBER:

- Reasonable annual dues. (\$20.00 per section; \$75.00 for all six!)
- Continuing Education in all areas of the law.
- ➤ Quarterly educational programs -- <u>Free</u> to Section Members.
- Spring Regional Seminar (So. California) and Fall Regional (Northern California) offering a discount on registration fees to section members.
- Quarterly newsletters containing up-to-date information, including changes in the law, new forms, and legal articles.
- Statewide roster of all members in all sections, for easy access to local procedural information in other counties.
- California Certified Legal Secretary®/MCLE/Paralegal CEU credits.
- Networking provides a forum for the exchange of information.
- Respect from employer when you pass on valuable information obtained at workshops and seminars.
- Professional and personal excellence.

For more information, contact Jennifer L. Page, Legal Specialization Sections Coordinator. Office: (415) 721-2040; Home: (415) 898-1010; Email: jlpage@ix.netcom.com

# LEGAL SPECIALIZATION SECTIONS Of LEGAL SECRETARIES, INCORPORATED

### MEMBERSHIP APPLICATION / ANNUAL RENEWAL FORM

Complete and mail with your check made payable to LSI, for \$20 for each section, or a total fee of \$75 per year to join all SIX sections simultaneously if an LSI Member, or \$40 for each section or a total fee of \$150 per year to join all sections simultaneously if joining as a non-LSI member.

Jennifer L. Page, Legal Specialization Coordinator, Mail to: 1641 Hill Road, Novato, California 94947 Enclosed is payment of my dues for the fiscal year 8/1/07 through 7/31/08 for the following Section(s). Please check appropriate boxes below for the sections you are joining. Method of Payment: Check, payable to "LSI," enclosed □VISA □ MASTERCARD □ Credit Card Information: Number \_\_\_\_\_ Expiration Date: Month \_\_\_\_ Year \_\_\_ Name on Credit Card: \_\_\_\_\_ Card Verification Number PER LSI STANDING RULES, CHECKS ISSUED TO LSI WHICH ARE NON-NEGOTIABLE BECAUSE OF INSUFFICIENT FUNDS OR OTHER REASON SHALL BE REPLACED IMMEDIATELY BY CASH, A CERTIFIED CHECK OR MONEY ORDER FOR THE AMOUNT OF THE ORIGINAL CHECK, PLUS \$25 PENALTY, PLUS THE ACTUAL COST CHARGED LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL **NEW** RENEWAL **Criminal Law** Family Law Law Office Administration Litigation Probate/Estate Planning **Transactional Law** (PLEASE PRINT OR TYPE) NAME: MR./MRS./MS ADDRESS/CITY/STATE/ZIP\_\_\_\_\_ LOCAL ASSOCIATION: LSA/LPA RESIDENCE PHONE ( ) BUSINESS PHONE: ( ) FAX: E-MAIL ADDRESS: EMPLOYER: \_\_ EMPLOYER'S ADDRESS: PREFERRED MAILING ADDRESS: 

HOME 
OFFICE 
EMAIL YEARS OF LEGAL EXPERIENCE: SPECIALTY: FAMILIAR WITH PRACTICE IN COUNTIES OF (Please indicate each County, not area):

### **CHAPTER ACHIEVEMENT REPORTING FORM**

Each Association in LSI participates every year in the Chapter Achievement Contest. Associations are grouped in categories depending upon the Association's membership (Group A: 5-30; B: 31-50; C: 51-75; D: 76-95; and E: over 95). Five awards of \$250 each are presented by Stuart F. Cooper Co. to the highest scoring Association in each of the above categories at the Annual Conference of LSI. Chapter Achievement points are tracked during the year by the Association's Governor. The Chapter Achievement Report covers activities from April 1, 2009 through March 31, 2010. This form's purpose is to track each member's activity during the course of the fiscal year. Please complete the form each time you attend a function and mail it to the person named below. If you attend a function and are not sure if it applies, include it below on the blank line provided and it will be determined if it applies. If you are an SLSA officer or committee chair, PLEASE take particular note to the last item below. Thank you.

Month/Year	Function					
	I submitted a potential advertiser to the Editor of The Legal Secretary magazine. (25 poi	nts per advertiser)				
	I submitted an article to <i>The Legal Secretary</i> magazine. (50 points per article)					
	I attended an LSI Quarterly Conference and/or Annual Conference. (50 points)					
	I attended an Officer/Chairman Workshop at the LSI Annual Conference. How many? _	(25 points)				
	I attended the President's Roundtable at the LSI Annual Conference. (25 points)					
	I belong to an LSI-sponsored credit union. (100 points)					
	l am insured through an LSI plan. (100 points)					
	I rented a car through Hertz and received the LSI discount. (200 points per rental)					
	I enrolled in an LSI-approved retirement planning program. (100 points)					
	I sponsored a CCLS study group. (200 points)					
	I participated in a CCLS study group. (25 points)					
	I conducted a CCLS Mock exam. (150 points)					
	I took the CCLS exam. (Test date:) (100 points)					
	I passed the CCLS exam. (Test date:) (200 points)					
	I submitted questions to the Continuing Education Council for use on the CCLS Mock ex	(am How many? (25 points)				
	I recertified as a CCLS during the 2009-2010 fiscal year. (50 points)	(20 points)				
	I gave a presentation on legal secretarial careers at a local educational institution. (50 p	nints her presentation)				
	I attended another Association's monthly meeting, installation, or other function. (50 points)					
	I taught an educational workshop or seminar. (75 points per event)	its per event)				
	I attended an educational workshop or seminar sponsored by SLSA or another local association. (25 points per event) I attended an educational workshop or seminar sponsored by a Forum, CEB or The Rutter Group. (25 points per event)					
	I conducted a short session on legal procedures at an SLSA dinner meeting. (25 points					
		per meeting)				
	I am a member of at least one Legal Specialization Section. (50 points)	<b></b> >				
	I am a member of all six Legal Specialization Sections as of March 31, 2009. (100 point					
	I attended a Legal Specialization Section Seminar at Quarterly or Annual Conference. H	ow many? (50 points per				
	meeting)					
	I attended a Legal Specialization Section Regional Seminar. (75 points)					
	I submitted an article for use in a Legal Specialization Section newsletter. (50 points)					
	I submitted an article to LSI Director of Public Relations for publication in the Daily Journ					
	I gave a formal presentation on benefits of membership to a law office. (50 points per pr					
	I gave a formal presentation on benefits of membership to the local bar association. (10)					
	I purchased the LSI Legal Professional's Handbook between April 1, 2009 and March 3					
	I purchased updates to the LSI Legal Professional's Handbook between April 1, 2009 ar	nd March 31, 2010. (100 points)				
	I purchased the Law Office Procedures Manual between April 1, 2009 and March 31, 20	10. (200 points)				
	I purchased updates to the Law Office Procedures Manual between April 1, 2009 and M	arch 31, 2010. (100 points)				
	I am an SLSA officer or committee chair. I timely responded to my LSI counterpart's qui	arterly directive(s). Attachéd is (are				
	a copy (copies) of my response(s). (20 points per directive)	, , , , , , , , , , , , , , , , , , , ,				
Name:	Phone:	_				
City:	State:	Zip:				
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Please attach additional pages if necessary. Thank you for your assistance. If you have any questions, you can reach Elicia Allen, CCLS at (916) 488-1795; or e-mail at eallen@tamurraylaw.com. Otherwise mail to:

Elicia Allen, CCLS SLSA Governor 2009-2010 Law Offices of Todd A. Murray 1050 Fulton Avenue, Suite 218 Sacramento, CA 95825

# CCLS QUIZ by Elizabeth Bomke, CCLS

# ETHICS & RULES OF PROFESSIONAL CONDUCT QUIZ

	True or False
	1. A legal assistant must make sure the client understands that he/she is not an attorney. That is, if a client needs advice that only an attorney may provide, the legal assistant must defer to an attorney.
	2. A legal assistant may perform an attorney's duty as long as he/she knows what the attorney would do.
	3. A legal assistant may render independent legal judgment if he/she has enough knowledge and experience to do so.
	4. If ethics prevent an attorney from taking an action, the legal assistant may do it because he/she is not an attorney.
	5. A legal assistant may give legal advice to his/her friends.
	6. If an attorney has the proper attorney/client relationship and responsibility, a legal assistant may perform any task that the attorney delegates to him/her.
	7. A legal assistant may negotiate fees with a client.
	8. As long as an assistant strictly follows the rules of ethics, appearance does not matter.
	9. A legal assistant may represent a client before the court if the court has authorized that assistant to do so.
	10. Codes of Conduct written by bar associations are only for attorneys; the codes for legal assistance come ONLY from the NALA.
	11. If the court clerk assumes that a legal assistant is an attorney, then the legal assistant does not have to correct that error.
	12. A legal assistant must do what is necessary to obey the ethics rules of the court.
	13. A legal assistant needs ongoing education only if his/her firms pays for it.
	14. A legal assistant must protect the confidences of a client.
Answers can be	found on Page 18.



THE LEGAL EAGLE PAGE 18

### LEGAL PROCEDURES by Annamaria Dugan

E-Discovery: California's Electronic Discovery Act

Amidst the controversy surrounding the State's budget negotiations, Governor Arnold Schwarzenegger quietly signed into law the State's first set of electronic discovery regulations. In 2006, the Federal Rules of Civil Procedure were amended to address and grapple with issues that arise in the e-discovery context in federal cases. The California Electronic Discovery Act, chaptered June 29, 2009, and which takes effect immediately, largely mirrors federal regulations.

Highlights of the Electronic Discovery Act include the following:

Electronically stored information should be provided in the form ordinarily maintained or in a reasonably usable form;

Supports previous laws that required production of electronic data, emails, instant messaging and other recoverable data in civil actions, while clarifying obligations for expense of recovery;

A party may object to the production of electronically stored information on burden or inaccessibility grounds, but that party bears the burden of providing that objection, and a court may still require production upon a showing of good cause by the demanding party; and the Act is applicable to third parties pursuant to subpoenas, although one can expect potentially less ediscovery burdens being placed on third parties as opposed to parties in a case; and

Any party or an attorney who, as a result of routine, good faith operation of an electronic system, fails to produce electronically stored information that has been lost, damaged, altered or overwritten, shall not be sanctioned.

Please refer to the full text of California's Electronic Discovery Act chaptered by Assem. Bill No. 5 (Stats. 2009, Ch. 5) in PDF file format or HTML file format by visiting: http:// www.leginfo.ca.gov.



# CCLS QUIZ ANSWERS by Elizabeth Bomke, CCLS

True	
Truc	

2. False

3. False 4.

5. False False

True

7. False 8.

6.

9.

False

True

10. False

11. False 12. True

13. False 14. True

### SACRAMENTO LEGAL SECRETARIES ASSOCIATION

### PRESENTS A LUNCH LESSON on

# "Master Calendaring"

Date/Time: August 13, 2009 - 12 p.m. to 1 p.m. CCLS Credit: 1.0

Registration begins at 11:45; speaker will begin promptly at noon. MCLE Credit: 1.0

Location: McDonough Holland & Allen, 500 Capitol Mall, 18th Floor, Sacramento

Topic: "Master Calendaring"

Speaker: Pamela Jansz, CLA, is the docket clerk and trainer for Seyfarth Shaw, LLP in

Sacramento. She has developed and trained Fireman's Fund Staff Counsel offices nationwide. Prior to Seyfarth and Fireman's she was an independent training consultant

with her primary focus consulting and training law firms on end user training and

implementation of CompuLaw Vision.

Cost: \$15 for LSI Members \$17 for non-LSI Members Seating is Limited – Register Today!

Lunch will be provided. Last day to register or cancel: August 12, 2009. No shows will be billed.

Name	Daytime Phone
	Are you a Member of SLSA?
Firm	Would you like information on SLSA
	Membership?
	Do you require an MCLE/CLE/CCLS certificate?
Mailing Address	□ MCLE/CLE □ CCLS □ Attorney
-	E-mail

Public parking is available in the building for a cost.

Make checks payable to: SLSA; mail reservation to:

Paula Lockard, CCLS McDonough Holland & Allen, PC 500 Capitol Mall, 18<sup>th</sup> Floor Sacramento, CA 95814-4692 Phone: 916.403.2531 Fax: 916.444.8334

Email: plockard@mhalaw.com



If you cannot attend this event but are interested in membership, please call (916) 488-1795 Visit our web-site: http://www.slsa.org

Sacramento Legal Secretaries Association, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 1 hour.



### **Sacramento Legal Secretaries Association Membership Renewal Invoice**

Membership Period: May 1, 2009 – April 30, 2010

**Due Date: May 1, 2009** 

Make check payable to:

### Sacramento Legal Secretaries Association

Amount Due:

(Renewals are due May 1 and will incur a late fee of \$5 after the date of June 1, 2009.)

Return the completed invoice and full payment to:

Debbie Frias, CCLS c/o The Crow Law Firm

700 E Street

Sacramento, CA 95814

MEMBED	INFORMATION	MI EACE PRINT	TECIBLY
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Which address should be listed in the n		□ Business	□ Residence
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Are you interested in being on the ballo What events, topics, and speakers wou	•	□ Yes	□ No
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Volume 8 Book 9 Page 21

# MEMBERSHIP CHAIR REPORT by Terry Olson-Skeahan

Hello Everybody!!

If you have not already done so, please renew your membership with SLSA!! And if you are not a member, please join!! The benefits are ENORMOUS!! It's still only \$40 for the entire year!!

Last month we installed M'Lisa Cunningham and Heather Kocina as members. They were not able to attend but were installed in absentia. We look forward to seeing them next month. Please, members, welcome them when you see them. And if you don't know them, introduce yourself. I have made some great friends just by walking up to someone and saying, "Hello, my name is Terry Olson-Skeahan. What is your name?"



Here is a little bio on our new members:

**HEATHER KOCINA** – Heather is a Managing Partner of SearchPros Staffing. She has 3 children and celebrates her birthday on January 27th.

**M'LISA CUNNINGHAM** – M'Lisa is a Legal Assistant with Murphy, Campbell, Guthrie & Alliston. Her sponsor is One Legal. She specializes in Family Law and Litigation. She celebrates her birthday on December 26.

We have some great topics coming up at our monthly dinner meetings, so please be sure to check the website for information on those meetings. If you become a member, your registration fee is less than that of a non-member to attend the meetings. We all need to take advantage of saving money, and our firms do too.

# BENEFITS HIGHLIGHT by Cassandra Baines

As an active member of SLSA, you are also a member of its parent association, LSI. LSI members have access to membership in Provident Central Credit Union. Please read the article below to find out more about Provident:

# Provident Central Credit Union Provident CU has joined Invest in America

Provident has joined Invest in America, a program designed to encourage credit union members to purchase products and services from American companies.

Buying American helps stimulate our economy and credit union members are offered incentives for buying such products. Chrysler, for example, is offering its "Chrysler Double Cash for Your Old Car" program through August 31, 2009. Consumers get up to a \$4,500 cash rebate when you purchase a qualify Chrysler, Jeep, or Dodge vehicle. This incentive program is designed to leverage the government "Cash for Clunkers" program.

If you qualify for the government program, you will receive double the money, or up to \$9,000! Meanwhile, General Motors is offering a discount equal to supplier pricing through December 31, 2009.

To learn more about Invest in America, along with the GM and Chrysler incentives, visit (www.lovemycreditunion.org).

As a reminder, stimulus tax break incentives are still in place for vehicle purchases. For specifics and to see if you qualify, go to (www.irs.gov/newsroom/article/0,,id=210901,00.html).



Page 22 The Legal Eagle

### REAL ESTATE VOCABULARY LIST by Elizabeth Bomke, CCLS

M - Z





Mortgage A written document executed by the owner of land by which the land

is given in trust, as security for the payment of a debt or the

performance of an obligation.

Mortgagor The party borrowing money from a bank or other lending agency,

who secures the loan with property the party owns in whole or in

part.

Personal Property All property which is not land or improvements permanently affixed

to land. For example, stocks, bonds, furniture, autos, clothing, promissory notes, etc. Items of tangible personal property are often

referred to as "chattels."

Personalty Things movable, as distinguished from real property or things

attached to the realty.

Preliminary Title Report A report showing the condition and/or clouds on the title of real

property in preparation for issuance of a title policy.

Property Anything that is owned by a person or entity.

Quitclaim Deed A deed which conveys whatever right, title, or interest the grantor

may have in property at the time of conveyance, if any. There is no guarantee or covenant of title implied in a a quitclaim deed (in

contrast to a grant deed).

Real Property Land and all buildings and fixtures permanently attached to land and

intended to be part of the land.

Reconveyance The process of clearing title on a property held under a deed of trust,

after the obligation has been paid in full; also the document that declares that the lender and the trustee no longer have any interest in the property. The lien is reconveyed to the owner of fee title.

Separate Property Property owned by a married person in his/her own right during

marriage.

Tenancy in Common A form of ownership by two or more persons who hold undivided

interests, without right of survivorship; interests need not be equal or created at the same time. On death, a tenant in common's interest may be passed to his/her heirs (in contract to joint tenancy).

Tenant A person who has been granted a tenancy in the real property of

another, also called "lessee." Also, a tenant may be lawfully in possession without a lease agreement, such as a tenant in possession when a lender forecloses on real property and acquires title at a

foreclosure sale.

Title Evidence of a person's right to or the extent of his/her interest in

property. "Clear title" refers to property on which there are no liens

or encumbrances and no competing claims of ownership.

[Continued on Page 26]

"BELIEVE, WHEN YOU ARE MOST UNHAPPY, THAT THERE IS SOMETHING FOR YOU TO DO IN THE WORLD. SO LONG AS YOU CAN SWEETEN ANOTHER'S PAIN, LIFE IS NOT IN VAIN."

HELEN KELLER

### REAL ESTATE VOCABULARY LIST CONTINUED

Title Insurance Insurance issued by a title insurance company against loss or damage resulting

from defects or failure of title to a particular parcel of realty, or from the enforcement of liens existing against it at the time the insurance policy was issued but not shown as exceptions to title in the policy. The policy does not

promise title, but only promises to pay if owner does not have title.

Trustee In a deed of trust, the entity to which bare legal title with the power of sale is

conveyed in trust for the benefit of the beneficiary (e.g. lender).

Trustor One who creates a trust. (In a deed of trust, the borrower.)

Warranty Deed A deed in which the grantor warrants good, clear title to the property. The

deed explicitly or implicitly contains covenants regarding the quality of title.





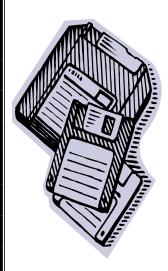
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## LAW OFFICE PRODUCTS/MANAGEMENT by Beba Maletic-Arsov

With electronic documents and email usage growing at such a rapid pace in law firms, maintaining comprehensive matter files has become more daunting. Records information is often left unclassified in lawyers' inboxes and personal folders. Further, many firms have no way to link physical files with electronic files for a complete matter record. Records personnel and IT staff must work together to make sure that all records, regardless of media type or source of origin, are managed consistently and according to the same classification and retention policies. Without a systematic process for classifying, retaining, retrieving and disposing of all records, firms increase their risk exposure as well as that of their clients.

One such program and the legal industry's most sophisticated search engine for records management is **LegalKEY Records Management**. The tool provides firms with the ability to track and manage all records from the creation through to final disposition. Drag and drop email capabilities reduce end-user burden and enhance overall compliance.

It operates much like a library system -checking records in and out and keeping track of individuals waiting for records. As a productivity tool, it also enables staff to create files, inserts, and documents from standard lists and then to electronically scan file and insert barcodes, simplifying time-consuming tasks such as packing boxes, running off-site transfers, check-out processes, re-files, and conducting office inventories. These capabilities, in combination with the built-in spellchecker and thesaurus, improve departmental efficiencies by accelerating the recording process and eliminating data integrity issues associated with manual records management practices.

The desktop module gives users a complete view of everything in the client/matter index, both electronic and physical. It provides end-users with limited and controlled access to the records management system. Because the desktop is web-based, it eliminates the need to install updates on each desktop, thereby insuring that *everyone* in the firm is always utilizing the most up to date software. A few things the module allows end-users to do:

- Request, view and select files from their desktops;
- Request delivery of physical items from the records center;
- Search, view and print indices and imaged records;
- Request creation of new items;
- Perform global searches; and
- Transfer records between users.

The solutions are designed to complement a law firm's existing technologies and business information flow. An invaluable program with time saving, efficient and economical tools to enhance the firm's productivity and yours.

For more information on LegalKEY Records Management go to:

http://www.opentext.com/2/uk/sol-industry/sol-ind-legal/sol-ind-legal-records-mgmt.htm



# Sacramento Legal Secretaries Association

Dinner Meeting - August 20, 2009

Vendor of the Month:



Speaker: Todd Vlaanderen of the

California Secretary of State's Office and Vice President of the Sacramento County Bar Association

On The Dotted Line... Notary Public Education Services

Topic:

"What's New with the Sacramento County Bar Association and California Notary Law"

5:30 – 6:15 p.m. Meet & Greet 6:15 – 8:00 p.m. Dinner Meeting Casa Garden Restaurant 2760 Sutterville Road, Sacramento Tel: (916) 452-2809 \$25 SLSA Members\*/\$29 Non-Members\* Benefitting the Sacramento Children's Home



RSVP by AUGUST 14. Complete & detach reservation form, enclose check payable to SLSA, and mail to: Jennifer Shelton, Murphy Austin Adams Schoenfeld, 304 "S" St., Sacramento, CA 95811; phone: 916.329.3104; fax: 916.503.4000; email: <a href="mailto:jshelton@murphyaustin.com">jshelton@murphyaustin.com</a>.
\*Please add \$3 for reservations made after AUGUST 14. NOTE: Cancellations must be received 48 hours in advance for a refund. No-Shows will be billed.

MCLE & CCLS Credit: SLSA, a local association of Legal Secretaries, Inc., an approved provider, certifies that this activity has been approved for minimum Continuing Legal Education credit by the State Bar of California and California Certified Legal Secretary credit in the amount of 0.5 hours.

<b>N</b> AME: _		ENTRÉE SELECTION:	
Address:		☐ Bangkok Chicken  (grilled chicken breast topped with a mild coconut-peanut sauce and served over cilantro-lime rice)	
CITY: _	State: Zip:	☐ Pasta Spirals* (pasta spirals filled with spinach, fontina and pinenuts)	
_	FAX:	*Vegetarian entrees must be ordered 24hours or more in advance.	
	Are you an SLSA member? □YES □NO If "No", are you interested in membe	rship? □YES □NO	
	Are you interested in hearing about SLSA volunteer opportunities? ☐ Y	ES □NO	

PAGE 26 THE LEGAL EAGLE

### PARLIAMENTARIAN REPORT by Rhonda Harrigan

#### The Minutes

The record of the proceedings of a deliberative assembly is usually called the Minutes, or the Record, or the Journal. In the meetings of ordinary societies, there is no object in reporting the debates; the duty of the secretary, in such cases, is mainly to record what is "done" by the assembly, and not what is said by the members. The minutes should show:

- Kind of meeting, "regular" (or stated) or "special," or "adjourned regular" or "adjourned special;"
- Name of the organization or assembly;
- Date/time of meeting and place, when it is not always the same;
- The fact of the presence of the regular chairman and secretary, or in their absence the names of their substitutes,
- Whether the minutes of the previous meeting were read and approved, or approved as corrected, and the date of the meeting if other than a regular business meeting;
- All main motions (except such as were withdrawn) and motions that bring a main
  question again before the assembly, stating the wording as adopted or disposed of,
  and the disposition--including temporary disposition (with any primary and
  secondary amendments and adhering secondary motions then pending;
- Secondary motions not lost or withdrawn where needed for clarity of the minutes;
- Previous notice of motions;
- Points of order and appeals, and reasons the chair gives for the ruling;
- Time of adjournment.

Generally the name is recorded of the mover, but not of the seconder, unless ordered by the assembly. When corrections to the minutes are made by the assembly, the corrections are made in the written text of the minutes being approved, and the minutes of the meeting where they are corrected merely state that the minutes were approved "as corrected", without actually stating the details of those corrections.

The secretary should sign the minutes, and in some societies the minutes are also signed by the president. When the minutes are approved, the word "Approved" should be written on the minutes with the secretary's initials and the date.

The essentials of a record should be entered, as previously stated, and when a count has been ordered or where the vote is by ballot, the number of votes on each side should be entered. When the voting is by roll call, a list of the names of those voting on each side should be entered, and those answering "Present", and enough names of those present, who fail to respond, to reflect that a quorum was present.

Where the regular meetings are held weekly, monthly, or quarterly, the minutes are read at the opening of each day's meeting, and, after correction should be approved. Where the meetings are held several days in succession with recesses during the day, the minutes are read at the opening of business each day. If the next meeting of the organization will not be held for a long period, as

[Continued on Page 31]

### PARLIAMENTARIAN REPORT CONTINUED

six months or a year, the minutes that have not been read previously should be read and approved before final adjournment. If this is not practical, then the executive committee or a special committee should be authorized to correct and approve them. A special meeting does not approve minutes, and its minutes should be approved at the next regular meeting.

When the reading of the minutes is dispensed with they can afterwards be taken up at any time when nothing is pending. If not taken up previously, they come before the assembly at the next meeting before the reading of the later minutes.

Robert's Rules says that all MAIN motions should be shown in the minutes. However, at a meeting, the secretary will have a need to record nearly all motions and what was done (their disposition), recording details that are not intended to show up in the final draft to be submitted for approval at the next regular meeting.

These notes will then be edited and condensed so that secondary motions, e.g. amendments, are not listed separately in the minutes, but are incorporated into the final wording that is the exact same wording used by the chair in putting the question to a vote and/or otherwise disposing of the main motion. The final draft will show all MAIN motions, as amended, and will not show the evolution of the wording of a motion during its amendment. Thus, a half-dozen handwritten pages may become a single typewritten page.

For example, the final draft minutes may be worded as follows:

After amendment, a motion by H.M. Robert was adopted, "that the club purchase a new laptop computer for use by the secretary in preparing minutes and other correspondence, at a cost not to exceed \$2,500."

The fact that the motion was amended is mentioned only parenthetically, without providing details.

www.parlipro.org



# APPLICATION FOR MEMBERSHIP IN SACRAMENTO LEGAL SECRETARIES ASSOCIATION

COMPLETE AND DELIVER THE <u>ORIGINAL</u> APPLICATION, WITH CHECK PAYABLE TO SLSA, FOR \$40 (\$25 FOR STUDENTS) WHICH INCLUDES LOCAL DUES, ANY INITIATION FEE, AND LEGAL SECRETARIES, INCORPORATED (LSI)\* PER CAPITA TAX, TO:

Terry M. Olson-Skeahan Bartkiewicz, Kronick & Shanahan 1011 22<sup>nd</sup> Street Sacramento, CA 95816

NAME OF APPLICANT			
EMPLOYER			
MAILING ADDRESS			
BUSINESS TELEPHONE ()			
BUSINESS E-MAIL			
EMPLOYMENT IN THE LEGAL FIELD (INCLUDE PO	SITIONS, DATES)		
PREVIOUS MEMBERSHIP IN A LEGAL SECRETARIES	S ASSOCIATION (INCLUDE ASSOCIATE	IONS, DATES)	
IF ACCEPTED AS A MEMBER, I AGREE TO BE BO INCORPORATED, AND THE LOCAL ASSOCIATION TO 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 the memory of Joan M. Moore, PLS, CCLS, LSI President 1980-82.)			
SIGNATURE OF APPLICANT	I	DATE	
SPONSOR	APPLICATION APPR	OVED	
~ ~ LSI LEGAL SPECL	ALIZATION SECTIONS MEMBE	RSHIP ~ ~	
LSI MEMBERS MAY ALSO JOIN ONE OR MORE O		<del></del>	
~ CIVIL LITIGATION	~ CRIMINAL LAW	~ FAMILY LAW	
~ LAW OFFICE ADMINISTRATION	PROBATE/ESTATE PLANNING	~ TRANSACTIONAL LAW	
SPECIALIZATION SECTION MEMBERSHIP INCLUDES: (1) QUARTERLY SECTION NEWSLETTERS; (2) FREE QUARTERLY CONFERENCE WORKSHOPS; (3) REDUCED REGISTRATION FEES FOR REGIONAL SPECIALIZATION SECTIONS SEMINARS; AND, (4) ROSTER LISTING EACH SECTION MEMBER'S NAME, CONTACT INFORMATION, EXPERTISE AND GEOGRAPHICAL AREA WITH WHICH FAMILIAR. SECTION DUES ARE NOMINAL AND A DISCOUNT IS OFFERED FOR MEMBERSHIP IN ALL SIX SECTIONS.			
FOR LSI LEGAL SPECIALIZATION SECTIONS www.lsi.org; or, TRANSMIT A COPY OF THIS EN			
LEGAL SPECIALIZATION SECTIONS COORDINATOR LSI CORPORATE OFFICE P.O. BOX 660 FORTUNA, CA 95540-0660			
FACSIMILE: 707.725.134	44 E-MAIL: lsiorg@suddenlin	kmail.com	

(Form adopted 5/01; revised 5/08)

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Talents, Interests, Hobbies:					
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Arbitration Bankruptcy	Law Office Management Litigation	Specify:	Other		
Business/Corporate Law	Probate/Estate Planning				
EDUCATION:					
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Secretarial Training Course Two Year Junior/Business Co.	Additional Education	Additional Education Above Four Year Degree			
TYPE OF OFFICE:	Salf Emmlared				
Law Office Government Services	Self-Employed Corporate Legal Depa	artment			
Court System	Other Specify:				
			Vacation		
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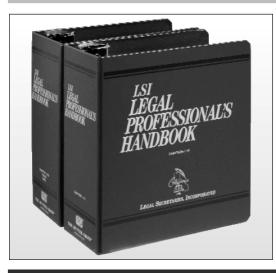
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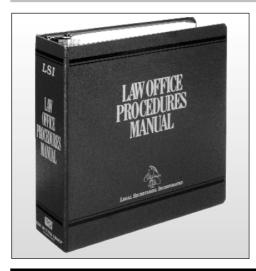
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### BEGINNING LEGAL SECRETARY COURSE by Astrid Watterson, CCLS

The Spring 2009 Beginning Legal Secretary ("BLS") course was conducted by Dawn Forgeur, CCLS and I, on behalf of the Sacramento Legal Secretaries Association. We have finished another successful Beginning Legal Secretary course. Many thanks to Jaymie Moralez for once again taking over the BLS Assistant position; without her, life would have been a lot more difficult. For a few years now, teaching these classes has included a partnership of two — we are now a trio. Thanks to Jaymie for taking the laboring oar of fielding calls, assisting with the registration process, assisting in correcting assignments, and keeping things organized so that Dawn and I could focus on the teaching part of the BLS class.

I would like to begin my report by congratulating the top ten scoring students for the Spring 2009 class. They did a fantastic job in earning their grade and working to keep it.

Geri Bauer Michelle Davis

Melissa Hatter Scotty Jorgenson

Janae Long Corrine Perez

Laura Peron Melanie Rogers

Andrea Savig Dee Souter

The Beginning Legal Secretary course is a 9-week training program designed to teach students about the introduction to the law office, file management, service of process, legal citations (i.e., differences between BlueBook and California Style Manual), discovery procedures, civil litigation procedures, docketing/calendaring, alternative dispute resolution, and pre-trial proceedings.

We began the class with 24 students. In order to pass the Beginning Legal Secretary class, a student must have a cumulative homework grade of 75% or more and pass the final exam with a grade of 75% or more. Overall, the class was a success. The final exam was a comprehensive exam including questions most commonly missed throughout the course and questions from all of the weeks of class instruction and reading materials. In the end, 21 qualified to take the final exam; 7 passed with an A; 6 passed with a B; 3 passed with a C of 75% or above — the required passing percentage.

While each class is different based on student personalities and the dynamics of the class itself, Dawn, Jaymie, and I really enjoyed this group of students. I was shocked at how organized this class was. They were there each day on time, homework set on the table, and ready to learn. It was a bit unnerving at first, since neither Dawn, Jaymie, or I had ever had a class run as smoothly, but we found that we had a genuinely good time and enjoyed spending time with each of them.

I would like to thank Downey Brand for allowing us to use their conference room and being such wonderful and accommodating hosts. Downey Brand has shown a tremendous support for SLSA's efforts to provide continuing legal education to the legal professional and we thank them for it!

I hope to see others step up and impart some of their knowledge. If you ever thought about it, I encourage you to try teaching and help others succeed and achieve their goals of continuing to learn and grow. Once again, thank you for allowing Dawn and I to teach this program.



### SACRAMENTO LEGAL SECRETARIES ASSOCIATION

### PRESENTS A LUNCH LESSON on

## "Unlawful Detainers - Step by Step"

Date/Time: September 22, 2009 - 12 p.m. to 1 p.m. CCLS Credit: 1.0

Registration begins at 11:45; speaker will begin promptly at noon. MCLE Credit: 1.0

Location: McDonough Holland & Allen, 500 Capitol Mall, 18<sup>th</sup> Floor, Sacramento

Topic: "Unlawful Detainers – Step by Step"

Speaker: Elicia Allen, CCLS, is the current Governor, and past president of the Sacramento

Legal Secretaries Association. She is a paralegal at the Law Offices of Todd A. Murray.

She is a 2002 graduate of MTI College with an A. A. in Paralegal Studies and she

became a California Certified Legal Secretary in March 2008.

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Cost: \$15 for LSI Members \$17 for non-LSI Members Seating is Limited – Register Today!

Lunch will be provided. Last day to register or cancel: September 21, 2009. No shows will be billed.

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Public parking is available in the building for a cost.

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Email: plockard@mhalaw.com



If you cannot attend this event but are interested in membership, please call (916) 488-1795 Visit our web-site: http://www.slsa.org

Sacramento Legal Secretaries Association, a local association of Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 1 hour.

### OF NOTE by Cassandra Baines

With the State experiencing a budget crisis, "furlough" Fridays have become a reality. Legal professionals are faced with immediate changes in the court system. Following are change notices for a few local counties.



# The Superior Court of California, County of Yolo

725 Court Street, Room 308 ● Woodland, California 95695 ● Telephone 530-406-6838

In an effort to mitigate significant decreases in funding, Yolo Superior Court will implement a budget reduction plan that includes twelve (12) days of Court staff furloughs to begin on August 19, 2009 and continue every third Wednesday of each month, with an additional Wednesday in December.

In order to provide continued service to the public, the August 19<sup>th</sup> furlough will not close the court entirely. Rather, we will run an arraignment calendar and have minimum staff on site to handle statutorily mandated services, emergency matters, accept filings and payment of fines. All other services will be suspended.

The arraignment calendar is expected to be handled in Department 9. Room 111 on the first floor of the main courthouse, will be open to the public from 8:00 am to 4:00 pm for filing of documents (civil and criminal), and DV restraining orders. The payment center in the main courthouse will also be open to the public from 8:00 am to 4:00 pm.

A judge will be available for search warrants and other emergency matters from 8:00 to 4:00. Law Enforcement Officers are asked to go to Room 111 for assistance. The phone number for emergency protective orders is (530) 406-6759.

There is also pending statewide legislation that would completely close courthouses on the third Wednesday of each month. If the proposed legislation *is* passed, it will likely not be implemented until the third Wednesday of September. However, in order to achieve the 12 day furlough program for fiscal year 2009-10, Yolo Superior Court will partially close one Wednesday in August and one additional Wednesday in December.

If the legislation does *not* pass, the court will continue to have mandatory furlough days with partial court closure the third Wednesday of each month, with one additional Wednesday in December.

The following is a schedule of Court furlough days for 2009-10:

Aug. 19, 2009 Oct. 21, 2009 Dec. 15, 2009 Jan. 20, 2010 Mar. 17, 2010 May 19, 2010

Sept. 16, 2009 Nov. 18, 2009 Dec. 23, 2009 Feb. 17, 2010 Apr. 21, 2010 June 16, 2010

Please pass this information along. If you have useful information you would like to share with your fellow members, you may email it to Cassandra Baines at chaines@downeybrand.com

[Continued on Page 42]

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### OF NOTE CONTINUED



### Change to Filing Deadlines for San Joaquin Superior Court

Effective Monday, August 3, 2009, the new hours for the Superior Court of California, San Joaquin County will be 8:00 a.m.-3:00 p.m. The Tracy and Lodi Court locations will be moved from 2:00 p.m. to 1:00 p.m.

### **Questions re Superior Court Furlough and Filings**

Since the drop box is available on the furlough days, do we count that furlough day as a court day? Or a holiday?

If a document is due on that furlough day, is it supposed to be placed in he drop box?

If a hearing is scheduled for a date 16 days out (or more), I assume you count that furlough day as a holiday?

#### Answer:

Furlough days are considered the same as court holidays, so documents cannot be filed on those days or back-dated to the furlough day if the document is put in the drop box. Documents placed in the drop box on furlough days will be filed as of the next court working day. If a document is due on the furlough day, it will be treated as a weekend or holiday due date and will be given until 5:00 p.m. the next working day to be filed. If a hearing is scheduled for a date 16 days out or more, the furlough day will be counted the same as a holiday. Every court should be treating the furlough days the same, but we have not received any formal information from the AOC yet.

Diana Landmann, Court Manager San Joaquin County Superior Court 222 E. Weber Avenue, Room 303 Stockton, CA 95202 209.468.2364 7/30/09

### **Eastern District Bankruptcy Court**

On August 2, 2009, at 8 PM, the Court's e-Filing system will be updated and changes will be as follows:

- An Amendment Cover Sheet for Master Address List and an Amended Master Address List (as text file) will be required anytime an Amended Schedule D, E, or F that adds creditors is filed. EDC form 2-015 for the Amendment Cover Sheet has been modified to reflect this change. In addition, the "pick-list" of the subtypes pertaining to amendments will be rearranged so that the more common selections appear at the top of the list.
- Filers will be required to acknowledge that they have read the notice regarding redaction responsibility before they will be allowed to login. This notice will be displayed to the left of the "Log In" text boxes. If filers do not acknowledge the notice they will not be able to login.

### OF NOTE CONTINUED

### San Bernardino Superior Court

Pursuant to California Rules of Court 10.620, the Superior Court of California, County of San Bernardino hereby gives notice that commencing October 12, 2009, it intends to close the Superior Court located in Redlands, California.

The court intends to transfer all Probate matters to the Civil Division, located at 303 West Third Street, San Bernardino, CA, and traffic matters to 351 North Arrowhead, San Bernardino, CA.

All filings for Probate matters will be accepted by the Probate Division of the Clerk's office located at 303 West Third Street, San Bernardino, CA.

All Redlands filings for traffic matters will be accepted at 351 North Arrowhead Avenue, San Bernardino, CA.

The Clerk's offices are open Monday through Friday, 8:00 a.m. to 4:00 p.m., except for court holidays.

All public comments must be sent via email to the Presiding Judge of the Superior Court at Redlands@courts.sbcounty.gov.

Comments must be received by Friday, August 21, 2009 at 5:00 p.m.



THE LEGAL EAGLE PAGE 40



# NEWS RELEASE

Release Number: 40

Date: July 30, 2009

### JUDICIAL COUNCIL OF CALIFORNIA ADMINISTRATIVE OFFICE OF THE COURTS Public Information Office 455 Golden Gate Avenue San Francisco, CA 94102-3688 www.courtinfo.ca.gov

415-865-7740

Lynn Holton Public Information Officer

# Judicial Council Approves Reallocation of \$159 Million to Support Trial Courts

Council Also Approves Court Closures of One Day a Month From September 2009 to June 2010

San Francisco—In response to the unprecedented statewide fiscal crisis and judicial branch budget reductions, the Judicial Council of California yesterday approved the reallocation of \$159 million in special funds to offset cuts to the trial court operations budget. The special funds address on a one-time basis a portion of the court funding cuts and unfunded growth costs for court security, employee retirement, dependency counsel, and the court interpreter program.

In addition, the council approved the closure of all state courts on the third Wednesday of each month, from September 2009 through June 2010. The actions were taken at a public meeting here yesterday.

The court closures are authorized by Government Code section 68106, recently approved by the Governor and Legislature as part of budget trailer bill (Senate Bill X4 13) to the 2009–2010 Budget Act.

"The mission of the Judicial Council is to improve access to justice, so it is extremely difficult for us to make any decision that results in closing our courts," stated Chief Justice Ronald M. George, chair of the Judicial Council. "However, it is important that we have a broad perspective during these times and not take any action that in the long term may be even more devastating than the proposals we are now considering."

The state's top jurist also encouraged judges to take part in voluntary pay reductions, since court employees who are furloughed also will be subject to pay cuts. The Chief Justice indicated that he will take a voluntary pay cut starting at the first available opportunity.

# LEGAL SECRETARIES, INCORPORATED MEMBERSHIP LIST AS OF 1/31/09

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25	Antelope Valley	LSA	3	ļ	18	21
57	Beverly Hill/Century City	LSA	0		49	49
24	Butte County	LPA	1		16	17
47	Capitol City	LPA	12		34	46
11	Conejo Valley	LPA	0		10	10
30	Desert Palm	LPA	1 2		23	25
17	El Dorado County	LPA	0		22	22
33	Fresno County	LPA	10		28	38
49	Humboldt County	LPA	13		40	53
44	Imperial County	LPA	12		22	34
38	Livermore-Amador Valley	LPA	4	l	35	39
66	Long Beach	LSA	30		49	79
34	Los Angeles	LSA	11		22	33
15	Marin County	LPA	6		12	18
41	Merced County	LPA	1 1		30	31
30	Monterey County	LSA	10		21	31
41	Mt. Diablo	LPA	16	2	37	55
20	Napa County	LSA	0		19	19
100	Orange County	LSA	26		58	84
31	Palo Alto	LSA	5		27	32
25	Placer County	LPA	5		14	19
31	Redding	LPA	0		9	9
15	Rio Hondo District	LPA	4		15	19
52	Riverside	LPA	7		24	31
190	Sacramento	LSA	56		97	153
177	San Diego	LSA	73 .		125	198
59	San Fernando Valley	LSA	7		39	46
54	San Francisco	LPA	6	<1>	44	50
37	San Gabriel Valley	LSA	3		25	28
65	San Mateo County	LSA	15		53	68
28	Santa Barbara	LSA	2		19	21
55	Santa Clara County	LSA	14		36	50
18	Santa Cruz County	LPA	4		16	20
24	Santa Maria	LPA	9		19	28
44	Sonoma County	LSA	0		42	42
14	Southern Butte	LSA	3		11	14
40	Stanislaus County	LPA	0		30	30
39	Stockton-San Joaquin	LPA	5		38	43
5	Trinity County	LSA	0		5	5
38	Ventura County	LPA	3		29	32
25	Members at Large		20	<1>	21	41
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Please fill out this form to let us know the changes you would like to make to your membership record.

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