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WWW.SLSA.ORG

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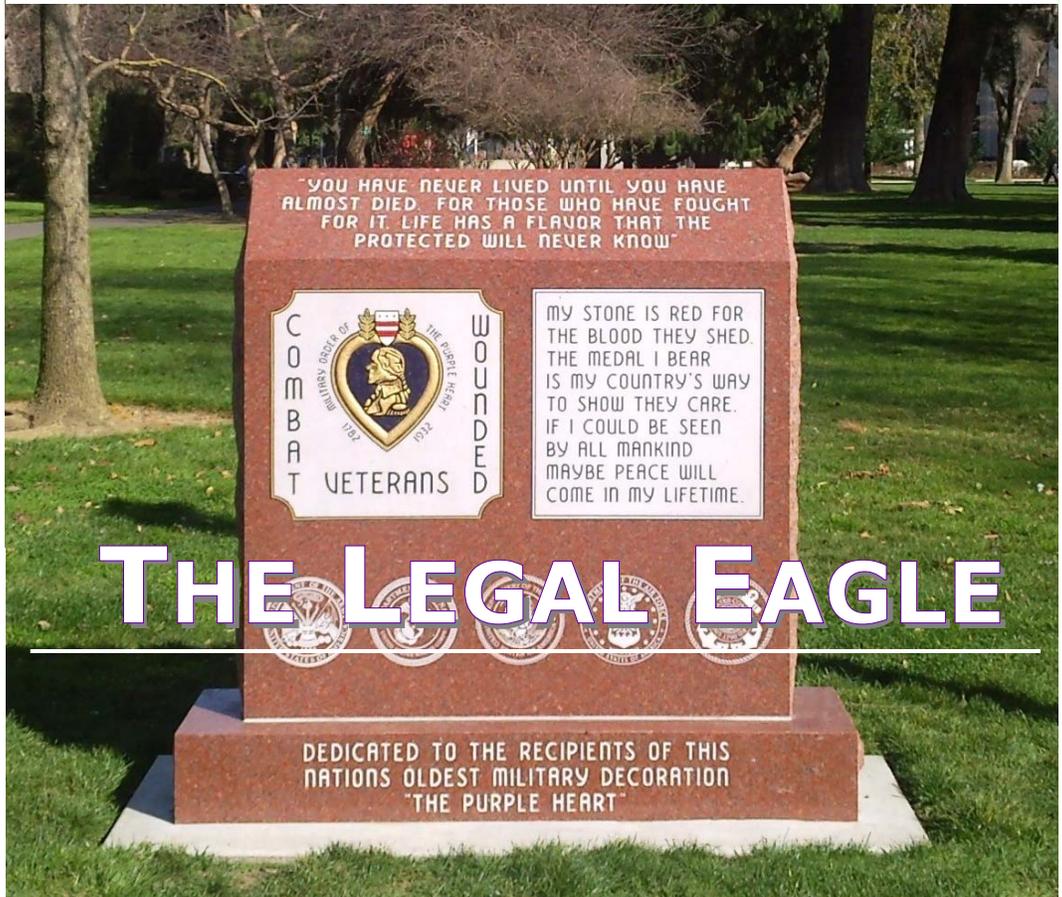
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## Sacramento Legal Secretaries Association



# THE LEGAL EAGLE



## May Events

- **May Regular Dinner Meeting – May 10.** This meeting will be held at the Courtyard Marriott - Midtown Sacramento, 4422 Y Street, Sacramento. You can register online through our website ([www.slsa.org](http://www.slsa.org)) or contact Maimie Chyinski at [reservations@slsa.org](mailto:reservations@slsa.org). *See page 14.*
- **LSI 78th Annual Conference – May 17-20.** This conference will be held at the Bahia Resort Hotel—998 W. Mission Drive, San Diego. *See pages 24-25.*

## 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!



# President's Report

by Dawn Forgeur, CCLS



My goal is to continue to bring you quality educational meetings.

~Dawn Forgeur, CCLS



It's the start of the new fiscal year and my second term as your President. Thank you for electing me again. I would like to once again congratulate and introduce the rest of your Executive Board for this year:

**Vice President:**  
Lynne Gomes

**Secretary:**  
Maimie Chyinski

**Treasurer:**  
Deseree Gamayo

**Governor:**  
Melanie Herman

**Parliamentarian:**  
Astrid Watterson, CCLS

My installing marshal this year was Astrid Watterson, CCLS. This was her first time installing an executive board into office, and she did an awesome job! Thank you, Astrid.

My goal is to continue to bring you quality educational meetings. SLSA has been hard at work lining up speakers for the dinner meetings, and as they are confirmed, that information is being updated online in the events section of the website. SLSA will also be hosting Lunch Lessons every other month this year! I am very pleased to be able to announce this, as Lunch Lessons was one of the most requested events last year. As Lunch Lessons are confirmed,

those events will also be updated on the website and Facebook.

LSI's Annual Conference will be held in San Diego from May 17-20, 2012. Please see the Governor's Report for information about classes being held. Remember, if you can't attend one of the Legal Specialization Section Seminars, you can always purchase a copy of the handouts by using the LSS registration form, which can be found in this bulletin.

I hope to meet more of you this year at the events and meetings. Please feel free to send me an email if you have any questions, suggestions, or comments ([president@slsa.org](mailto:president@slsa.org)) about SLSA.



## CHANGE OF ADDRESS:

Please remember if you have moved offices or home, be sure to send us your Change of Address form so that we can update our records. This will minimize any delay in your receiving our monthly bulletin, any correspondence, and the LSI quarterly magazine. The change of address form can be found in this bulletin or on our website. They should be mailed to our Vice President and Membership Chair, Lynne Gomes, to her work address at Greenberg Traurig, LLP, 1201 K Street, Ste. 1100, Sacramento, CA 95814.

## Of Note



The Los Angeles County Superior Court has announced that by June 30, 2012, the court will reduce its staff by nearly 350 workers, close 56 courtrooms, reduce its use of court reporters, and eliminate the Informal Juvenile Traffic Courts. Courtrooms being closed include 24 civil, 24 criminal, 3 family, 1 probate and 4 juvenile delinquency courts. The court said that as of May 15 it will no longer provide court reporters for civil trials. The court also noted it is making significant reductions to its non-courtroom staff.

## Parliamentarian's Corner

By Astrid Watterson, CCLS

### Debating a Motion:

According to Robert's Rules of Order, when debating a motion there are several things you should know about the rules, such as:

- Are there speech limits?
- Who gets preference in a debate?
- Stick to the subject.
- Debate the issues, not personalities.
- Follow the rules.

Ideally, a member may speak in a debate twice on the same day on the same motion. If a time restriction has been set prior to the debate, you will need to stick to that. Generally, you are not supposed to speak on the same motion more than twice. As for who can speak, the chair normally recognizes the person who rises first after the previous speaker has finished. You cannot, while someone else is speaking, attempt to interrupt. The chair should pick someone who is for the motion and then someone who is against the motion and so forth in order to make it even and provide everyone with an opportunity to debate the motion. When

debating, you should stick to the subject. The rule is that your remarks must be **germane**, which means that they must have bearing on whether the pending motion should be adopted. Speaking on topics that are irrelevant is not in order. You should keep in mind what you are debating and stick to the issue. This leads to the last two items, debating the issues and not the personalities. Robert's clearly states that one of the most important rules of debate is that the *proposal*, not the member, is the subject of the debate. When a motion is pending, you may attack the idea or the results of the proposal, but you are not supposed to attack or question the motives of another member. Those type of items are not meant to be discussed during a debate. Robert's has a great example for following formalities in a debate. You should remember to speak to the chair, not directly to the other members. You wouldn't say, "Helen, your argument is ridiculous! I can't believe you expect us to believe that." Instead, you may try to say, "Madame President, the last speaker's final point doesn't really make sense." Being successful in debating a motion can be accomplished by following the rules, sticking to the subject, and keeping in mind the purpose of the debate.

“Speaking on topics that are irrelevant is not in order.”

~Astrid Watterson,  
CCLS



# Membership Chair Report

by Lynne Gomes

*Welcome, and congratulations to the following new SLSA members, who were inducted at the April 19, 2012 regular membership meeting.*

## ACTIVE MEMBERSHIP

**Jeffrey Shuitema** -- Jeffrey is the President of Legalese Attorney Service, Inc., and has worked as a process server and legal support professional since 1978. Jeffrey enjoys boating skiing, and music.

**Elizabeth York** -- Elizabeth is a practice assistant at Stoel Rives, LLP. She has been a paralegal/legal assistant since 1996, and specializes in business/corporate, litigation, and CEQA law. Elizabeth celebrates her birthday on January 17.

**Marina Tsushko** -- Marina is a legal secretary with the law office of Sevey, Donahue & Talcott. She has been a legal professional since 2006, and specializes in civil law. Marina celebrates her birthday on August 23, and enjoys volleyball, scrapbooking, and reading.

**Melanie Daly** -- Melanie is a receptionist at the law office of Hanson, Kohls, Jones, Sommer & Jacob. She has been a legal professional since 2009, and specializes in litigation, personal injury, and professional liability. Melanie celebrates her birthday on March 13, and enjoys music, pet rescue work, food and wine, and continuing education.

**Janice Warner** -- Janice is a legal secretary with Carroll, Burdick & McDonough. She has been a legal professional since 1986, and specializes in litigation. Janice celebrates her birthday on December 11, and enjoys catering, ceramics, and gardening.

**Debra Yurgelevic** -- Debra is a legal secretary with Abbott & Kindermann. She has been a legal professional since 1980, and specializes in administrative, business/corporate, real estate, and land use law. Debra celebrates her birthday on September 24, and enjoys yoga, cooking, and gardening.

**Alicia Amaro** -- Alicia is a legal assistant with Lozano Smith. She has been a legal professional since 1988, and specializes in administrative, litigation, and election law. Alicia celebrates her birthday on June 12, and enjoys yoga and being a grandparent.

**Brenda Shaw** -- Brenda is a legal secretary with the law office of Randy C. Renfro. She has been a legal professional since 2009, and specializes in tax, business and corporate law.

## STUDENT MEMBERSHIP

**Tamara Rene Marotto** -- Tamara is a student at MTI College, pursuing paralegal studies. She celebrates her birthday on October 10, and has previous law office experience from Phoenix, Arizona.

*If you are interested in membership in SLSA, please contact Lynne Gomes at (916) 442-1111, or via e-mail at [gomesl@gtlaw.com](mailto:gomesl@gtlaw.com).*

## CONDOLENCES:

To SLSA member Corene Rodder on the passing of her mother-in-law. Please keep Corene, her husband Frank, and their family in your thoughts and prayers.

*(Forwarded by LSI President Brooke Mansfield-Atherton, CCLS)* Mary King, long-time member of San Mateo County LSA, passed away on April 12, 2012. Mary was very involved with her local association and many of you may remember her attending LSI conferences. Please keep Mary's daughter, Karen, and the rest of the family in your thoughts and prayers. Cards can be sent to:

Karen Twitchell  
2315 Eastridge Avenue #711  
Menlo Park, CA 94025

## CONGRATULATIONS!!

To Teri McClory, CCLS, and her family on the graduation of her daughter from the University of Arizona!

## CHANGES?? UPDATES??

*Are you an SLSA member who has moved? 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 the good times, and support you during the tough times. Please send your news to [gomesl@gtlaw.com](mailto:gomesl@gtlaw.com).*

# Employment Report/Positions Available

by Jaymie Morales



This free benefit provides the legal community with a place to post job openings for all categories of job positions. SLSA assists in every possible manner to procure employment for members of this association, and cooperates with attorneys in filling positions in law offices, but in no event does this committee act as an employment agency.

Attorneys will need to give the following information to the Employment Chair: name, firm name, address, phone number(s), areas of law practice, software used, position available, years of experience required. The attorney/employer is requested to e-mail the Employment Chair with the advertisement formatted like those currently posted on the "Employment Opportunities" page. Ads are usually posted within 48 hours.

It is the responsibility of the applicants to contact the employers, schedule interviews, exchange résumés, and to discuss benefits and salary, etc. All information is listed until notification to drop the name/position is given to the Employment Chair.

Please contact Employment Chair Jaymie Morales, at (916) 446-7979, or e-mail her at [jmorales@somachlaw.com](mailto:jmorales@somachlaw.com). A detailed message can be left, and your call will be returned within 24 hours. If you wish your listing to be placed on our web page, please indicate your authorization to do so.

- (5/2/12) Legal Secretary. Mennemeier, Glassman & Stroud LLP, a small, congenial downtown law firm specializing in civil litigation is seeking an experienced litigation secretary. Candidates should have 2 years of litigation experience; understand state and federal court rules and protocols, including the Courts of Appeal; the ability to multi-task under tight deadlines; be able to edit and proofread legal documents and correspondence; have excellent clerical skills for maintaining high-volume files; work well with others. Proficiency in WordPerfect and Timeslips is a must and working knowledge of Word, Excel and PowerPoint is desired. The firm offers health benefits, paid parking, and competitive salary. Interested parties may send resumes via email [tocfarrell@mgsllaw.com](mailto:tocfarrell@mgsllaw.com), or via fax to 916-553-4011. No telephone calls please.
- (4/12/12) Billing Clerk Murphy Austin Adams Schoenfeld LLP is a downtown law firm looking for a qualified Billing Clerk candidate with five-plus years of law firm accounting experience. Law firm billing experience is essential. The successful candidate must be able to multi-task in a fast-paced, professional environment, enjoy working as part of a team, and demonstrate a commitment to client service. In addition, excellent organizational skills and attention to detail as well as the ability to work well with others is required. Advanced computer skills and aptitude are also required. Advanced skills in time and billing software, Microsoft Word, Excel, Outlook and document management systems are required, with proficiency in TABS III a plus. Must be able and willing to learn other software systems that support a law firm accounting department. Murphy Austin offers a competitive salary and benefit package. Well-organized, detail-oriented, and motivated applicants should submit resumes to: Trish Hughes Kreis at [thkreis@murphyaustin.com](mailto:thkreis@murphyaustin.com).
- (4/3/12) Senior Paralegal E\*TRADE Financial is seeking a Senior Paralegal for our Roseville, CA office. The Senior Paralegal will split time supporting the Associate General Counsel in handling securities litigation and arbitration cases, and supporting the Manager of Legal Services in all aspects of corporate governance and other legal projects for E\*TRADE's foreign subsidiaries. Must have 5+ years of experience in a related field and paralegal support position; BA, AA and/or paralegal certificate preferred. If you are interested, please send your resume to Melissa Yu at [melissa.yu@etrade.com](mailto:melissa.yu@etrade.com).
- (3/28/12) Transcriptionists Transcription company providing transcripts of interviews, meetings, focus groups, and presentations is looking for qualified transcriptionists who can work part time from their homes. Excellent work ethic, grammar and punctuation skills, 80 to 100 wpm typing speed, and the ability to research items on the Internet are required. Transcription experience is extremely helpful, but not required. Must use Word, e-mail, and be able to transcribe from digital audio recordings. If you are not set up to do transcription from digital audio recordings, we can help you. Benefits are flexible work schedules, working from home, interesting subject matter, and great people to work with. Transcriptionists work as independent contractors. Please contact Gwen McCutcheon, Premium Business Services, [gwen@premiumbusinessservices.com](mailto:gwen@premiumbusinessservices.com) for more information.



# Legal Procedures: Time Entry/Timekeeping

by Lynne Gomes

## *Tips to Help You and Your Attorney “Recapture Lost Time”*



**H**ow many times have you heard your attorney say, “What did I do from 3 p.m. to 4:30 p.m. yesterday?” Or, “I have all these blanks on my timesheet for last Friday and I can’t remember what I did!” Definitely a frustrating situation for both the attorney and the support staff who enters or records the attorney’s time!

Whether your office uses automated software for timekeeping/time entry, or uses the tried-and-true paper Day Timer and pen, almost every law office tracks billable (as well as non-billable) time spent by attorneys and paralegals. Capturing that time in a consistent, organized, accurate, and reliable method is not only good business practice, it is essential for the financial success of the law firm. Lost time can be a huge revenue drain, affecting billings, attorney productivity statistics, office budget forecasting, and accounts receivable. Also, parties who prevail in litigation and are able to recover attorneys’ fees rely on the accuracy of a firm’s timekeeping and billing practices when submitting their requests to the court.

If you enter time for an attorney, if you are a paralegal who bills time, or if you simply find yourself struggling every month to help your attorney recapture their time, perhaps these tips will be useful to you.

### **E-mails**

While the traditional method of business correspondence is certainly still in place, most people will agree that a great deal of our professional communication today occurs electronically. E-mail can be a great tool for recapturing time. If you have rights to your attorney’s e-mails, check to see if there is billable time contained in some of those e-mail exchanges between clients, other attorneys working on the case, opposing counsel, mediators, etc.

### **Calendar Entries**

Do you have access to your attorney’s daily calendar (either electronic or paper)? Go back and review it for meetings, conferences, consultations, court appearances, etc., that may have been missed in your time entry.

### **Telephone Calls**

Do you sit near your attorney’s office? Do you usually hear them on the phone and have a good idea who they are talking to and what case(s) they are discussing? Do some of those calls slip through the cracks and not make it onto your attorney’s timesheet? If you have time, make a note of the phone call. When you are entering the attorney’s time, if the call is not there, casually mention it to them. “Hey, Mike, you had a phone call with opposing counsel on the XYZ case last Thursday and I noticed it wasn’t on your timesheet. Did you want to include that?” Of course, if your attorney has their door shut most of the time, you may not be able to help in this area!

### **Blackberry/Cell Phone Call Logs**

Just as with e-mails, a lot of your attorney’s communication today is likely to occur via cell phone, in addition to the standard office phone. One of the great things about cell phones is the instant call log as it records the outgoing and received telephone calls. Have your attorney go back through their cell phone log to see if there is time that can be recaptured.

### **Last-Minute/Unexpected Meetings**

When an unexpected or last-minute meeting arises, immediately put it on the attorney’s calendar (or on your own calendar), or write it on a Post-It Note to put on the attorney’s calendar later as a reminder so that you have a record of the event.



# INSTALLATION

## 2012-2013



**APPLICATION FOR MEMBERSHIP IN  
SACRAMENTO LEGAL SECRETARIES ASSOCIATION**

COMPLETE AND DELIVER THE ORIGINAL 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:

**Lynne Gomes, Vice President  
Greenberg Traurig LLP  
1201 K Street, Suite 1100  
Sacramento, CA 95814**

NAME OF APPLICANT \_\_\_\_\_

EMPLOYER \_\_\_\_\_ POSITION \_\_\_\_\_

MAILING ADDRESS \_\_\_\_\_ CITY/ZIP \_\_\_\_\_

BUSINESS TELEPHONE (\_\_\_\_) \_\_\_\_\_ RESIDENCE TELEPHONE (\_\_\_\_) \_\_\_\_\_

BUSINESS E-MAIL \_\_\_\_\_ RESIDENCE E-MAIL \_\_\_\_\_

EMPLOYMENT IN THE LEGAL FIELD (INCLUDE POSITIONS, DATES) \_\_\_\_\_

PREVIOUS MEMBERSHIP IN A LEGAL SECRETARIES ASSOCIATION (INCLUDE ASSOCIATIONS, DATES) \_\_\_\_\_

IF ACCEPTED AS A MEMBER, I AGREE TO BE BOUND BY THE BYLAWS AND STANDING RULES OF LEGAL SECRETARIES, INCORPORATED, AND THE LOCAL ASSOCIATION TO WHICH I HEREBY APPLY FOR MEMBERSHIP, INCLUDING THE FOLLOWING CODE OF ETHICS:

*IT SHALL BE THE DUTY OF EACH MEMBER OF LEGAL SECRETARIES, INCORPORATED 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 \_\_\_\_\_ DATE \_\_\_\_\_

SPONSOR \_\_\_\_\_ APPLICATION APPROVED \_\_\_\_\_

**~ ~ LSI LEGAL SPECIALIZATION SECTIONS MEMBERSHIP ~ ~**

LSI MEMBERS MAY ALSO JOIN ONE OR MORE OF THE FOLLOWING LSI LEGAL SPECIALIZATION SECTIONS:

- ~ 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 MEMBERSHIP AND DUES INFORMATION, VISIT LSI'S WEBSITE AT [www.lsi.org](http://www.lsi.org); or, TRANSMIT A COPY OF THIS ENTIRE PAGE OF YOUR APPLICATION TO:**

LEGAL SPECIALIZATION SECTIONS COORDINATOR  
LSI CORPORATE OFFICE  
P.O. BOX 660  
FORTUNA, CA 95540-0660  
FACSIMILE: 707.725.1344 E-MAIL: [lsiorg@suddenlinkmail.com](mailto:lsiorg@suddenlinkmail.com)

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

\* ACCOMPANYING MEMBERSHIP IN LEGAL SECRETARIES, INCORPORATED, A CALIFORNIA NON-PROFIT MUTUAL BENEFIT ASSOCIATION, INCLUDES SUBSCRIPTION TO THE LEGAL SECRETARY MAGAZINE, REDUCED ANNUAL DUES FOR MEMBERSHIP IN LEGAL SPECIALIZATION SECTIONS AND DISCOUNTED PRICES ON PURCHASE OF LSI LEGAL PROFESSIONAL'S HANDBOOK AND LAW OFFICE PROCEDURES MANUAL.

SLSA and LSI MEMBERSHIP APPLICATION (continued)

Name: \_\_\_\_\_ Birthday \_\_\_\_\_

Talents, Interests, Hobbies: \_\_\_\_\_

**YOUR SPECIALTY:**

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Administrative Law     | <input type="checkbox"/> Criminal Law            | <input type="checkbox"/> Real Estate Law |
| <input type="checkbox"/> Appellate Law          | <input type="checkbox"/> Family Law              | <input type="checkbox"/> Taxation        |
| <input type="checkbox"/> Arbitration            | <input type="checkbox"/> Law Office Management   | <input type="checkbox"/> Other           |
| <input type="checkbox"/> Bankruptcy             | <input type="checkbox"/> Litigation              | Specify: _____                           |
| <input type="checkbox"/> Business/Corporate Law | <input type="checkbox"/> Probate/Estate Planning | _____                                    |

**EDUCATION:**

- |   |  |
|---|--|
| <input type="checkbox"/> High School Diploma              | <input type="checkbox"/> Four Year Bachelor's Degree                 |
| <input type="checkbox"/> Secretarial Training Course      | <input type="checkbox"/> Additional Education Above Four Year Degree |
| <input type="checkbox"/> Two Year Junior/Business College |  |

**TYPE OF OFFICE:**

- |  |   |
|--|---|
| <input type="checkbox"/> Law Office          | <input type="checkbox"/> Self-Employed              |
| <input type="checkbox"/> Government Services | <input type="checkbox"/> Corporate Legal Department |
| <input type="checkbox"/> Court System        | <input type="checkbox"/> Other Specify: _____       |

**BENEFITS PROVIDED BY YOUR EMPLOYER: (Check all that apply)**

- |   |   |                                   |
|---|---|-----------------------------------|
| <input type="checkbox"/> Retirement/401(k)      | <input type="checkbox"/> Major Medical  | <input type="checkbox"/> Vacation |
| <input type="checkbox"/> Disability Income Plan | <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Dental   |
| <input type="checkbox"/> Hospitalization        | <input type="checkbox"/> Vision         | <input type="checkbox"/> Other    |
|   | Specify: _____                          |                                   |

\_\_\_\_\_ CHECK HERE IF YOUR EMPLOYER PAYS FOR YOUR MEMBERSHIP DUES

\_\_\_\_\_ CHECK HERE IF YOUR EMPLOYER PAYS FOR MONTHLY DINNER MEETINGS

\_\_\_\_\_ CHECK HERE IF YOU ARE WILLING TO HOLD A STANDING COMMITTEE CHAIR OR ASSISTANT CHAIR POSITION

**WHERE WOULD YOU LIKE YOUR E-MAIL DELIVERED?**      [ ] BUSINESS      [ ] RESIDENCE

SLSA respects your privacy. If you do NOT want to be listed in SLSA's membership roster, check here: [ ]

How did you hear about SLSA? \_\_\_\_\_  
\_\_\_\_\_

Please make your check payable to **SLSA** in the amount of \$40 (\$25 for students). Mail payment with this form to:

**Lynne Gomes, Vice President**  
**Greenberg Traurig LLP**  
**1201 K Street, Suite 1100**  
**Sacramento, CA 95814**

# Benefit Highlights

Sacramento LSA is excited to be able to offer a brand new benefit for members! Absolute Autocare in Gold River is now offering members a 15% discount (excluding specials) to members of SLSA. You can also find them on Facebook at [www.facebook.com/absoluteautos](http://www.facebook.com/absoluteautos). I hope that you are able to take advantage of this discount!

**SLSA Members** "Trusted Auto Repair without High Prices and Beat Any Written Estimate by 10%"

**Save 15%** excluding specials



Like Us for more discounts, free car care clinics




facebook.com/AbsoluteAutos

(716) 635-6200  
2259 Sunrise Blvd  
Gold River, CA 95670  
Mon to Fri 8am-6pm  
Sat 8am-4pm

# CAPs

by Lynne Gomes

The final tally of Sacramento LSA's chapter achievement points for 2011-2012 was 49,110. We certainly hope that will be enough points to at least earn a place in LSI's Chapter Achievement Points Contest at the Annual Conference meeting in San Diego this month!

Whether it is purchasing the Law Office Procedures Manual, holding a beginning legal secretary course, taking the CCLS exam, attending another association's meeting or event, or attending an LSI Quarterly Conference, there is something ALL of us can do to help earn chapter achievement points! For a list of qualifying activities, please see the list included in this bulletin.

Thank you to everyone who reported their chapter achievement points and made sure we had a record of your qualifying SLSA and LSI activities.

# CCLS Quiz

True or False

- Once stapled, the pages of an original Will may still be unstapled for copying.  
 True     False
- The safe deposit box may be opened before the probate hearing, for the sole purpose of locating decedent's Will.  
 True     False
- Within 6 months after the date of the appointment of the personal representative, that personal representative must file the Inventory and Appraisal with the court clerk.  
 True     False
- The Notice of Petition to Administer Estate is to be published in a newspaper of general circulation in the city or area where the court is located.  
 True     False
- If the Will waives bond or all of the beneficiaries have waived bond, the Letters Testamentary can be issued immediately after the Order for Probate is filed.  
 True     False
- If a bank is appointed as the personal representative, no bond is required.  
 True     False
- If there is a holographic Will, when it is retyped, the secretary may correct all the misspellings in the document.  
 True     False
- A creditor has the later of 4 months from the date Letters Testamentary are first issued or 60 days from the date Notice is mailed to such creditor in which to file a claim.  
 True     False
- The estate may be distributed before the time expires for creditors' claims.  
 True     False
- Estate taxes must be filed within 12 months after the date of death.  
 True     False

See Answers, Page 19

# Law Office Products/Management

by Dawn Forgeur, CCLS

## Google Alerts

**G**oogle Alerts are emails that Google sends to you when Google finds new results on the Web to search terms that you define when you set up the Alert.

Google Alerts can be set up to be a very broad search or as specific as you would like. You can even limit the search to just one of these categories: everything, news, blogs, video, discussions, or books. You also have the choice of how often you would like to receive these Alerts: once a day (default), as-it-happens, or once a week.

You do not need a Google Account to use Google Alerts! If you don't have a Google Account, after you create your alert Google will send you a verification email to prevent spam, then once you click the verification link, you will start receiving Alerts.

Why would you want to use Google Alerts? You can create an alert on your own name to monitor what is being said about you – or you can even create an alert on your company's name to find out what is being said about your company. Maybe you want to

keep up to date on a another law firm or the legal industry itself. This is an easy way to do that. You also might want to follow an interesting court case that's going on.

Some tips from Google to help set up your alerts:

1. Try to be as precise as possible – the more precise your search terms are, the more relevant your alerts will be.
2. Use quotes around a group of words if you are looking for them together. For example “California Certified Legal Secretary” or “Dawn Forgeur.”
3. Put quotes around a single word to match that word precisely as you have typed it so that the Alert will exclude synonyms and spelling variations. For example: Michael “Jacson” to stop Google from including results for Michael Jackson.
4. Use a minus sign (-) in front of words that you want to exclude. For example: Paris -Texas.

For more information, go to: <http://www.google.com/alerts>.

# It's Membership Renewal Time!!!

by Lynne Gomes

**T**hank you so much for your continued membership in Sacramento LSA. Your support of the educational and professional goals of our association is so important, and it is very much appreciated!

Included in this bulletin is SLSA's Membership Renewal Form for the upcoming fiscal year. Please complete the renewal form and mail it, along with your renewal fee of \$40 (made payable to “SLSA”), so that it is received by May 1, 2012, to:

Sacramento LSA  
ATTN: Deseree Gamayo, Treasurer  
Stone & Graves  
2377 Gold Meadow Way, Suite 210  
Gold River, CA 95670

NOTE: All renewals received after June 1, 2012, will be considered late, and an additional \$5 fee will be applied



# Governor's Report

by *Melanie Herman*

This year, LSP's Annual Conference is taking place in beautiful San Diego at the Bahia Resort.

On Friday, May 18, there are several Officer and Chairmen Workshops for anyone who is interested.

### First Session

Minutes/Notes/Correspondence/  
Parliamentarian

Treasurer's Duties/Corporate Office

Ways and Means

Legal Secretary Training/Seminars

Day in Court/Lunch and Learn

### Second Session

Newcomer's Workshop

Governor's Workshop

Membership/Chapter Achievement

Programs

Hosting LSI Conference

There are also several Legal Specialization Section Seminars available for attendees.

### Friday, May 18

**Transactional Law** – Consumer Law and the Secrets of Car Buying with speaker John W. Hanson, Esq.

**Probate/Estate Planning** – To Inventory and Beyond (From Inventory to Distribution in a Probate Estate), with speakers Patricia Miller, PLS, CCLS, and Mary Rocca, CCLS

**Family Law** – How Using a Licensed Private Investigator Can Help Your Legal Cases, with speaker Dan Krotzer of Knox Attorney Service

**Criminal Law** – Introduction into the Federal Criminal Justice System, with speaker Francisco J. Sanchez, Esq.

### Saturday, May 19

**Civil Litigation and Law Office Administration Joint Seminar** – Ethics with speaker Patrick J. Kearns of Wilson, Elser, Moskowitz, Edelman & Dicker LLP

If you are interested in any of the Legal Specialization Seminars and are not able to attend conference, you may purchase the handout for only \$10. The form is included in this bulletin.



**CHAPTER ACHIEVEMENT REPORTING FORM**

Each association in LSI participates every year in the Chapter Achievement contest. An award of \$250 is presented by LSI to the highest scoring association in each membership category at the Annual Conference of LSI. Chapter Achievement Points (CAPs) are tracked during the year by SLSA's Governor. This covers activities from April 1, 2012, through March 31, 2013. This form's purpose is to track each member's activity during the course of the fiscal year. **Please complete this form each time you attend a function and mail it to SLSA's Governor.** 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.

**Date of Event**

**Event**

- \_\_\_\_\_ I submitted an article to *The Legal Secretary* magazine. (50 points)
- \_\_\_\_\_ I attended an LSI Quarterly or Annual Conference. (50 points)
- \_\_\_\_\_ I attended an Officer/Chairman Workshop at the Annual Conference.  
How many? \_\_\_\_\_ (25 points)
- \_\_\_\_\_ I belong to an LSI-sponsored credit union. (100 points)
- \_\_\_\_\_ I am insured through an LSI plan. (100 points)
- \_\_\_\_\_ I rented a car through Hertz with the LSI discount. (200 points)
- \_\_\_\_\_ I took the CCLS exam - Test Date: \_\_\_\_\_. (100 points)
- \_\_\_\_\_ I passed the CCLS exam - Test Date: \_\_\_\_\_. (200 points)
- \_\_\_\_\_ I submitted questions to LSI for use on the CCLS Mock exam.  
How many? \_\_\_\_\_. (25 points per question)
- \_\_\_\_\_ I recertified as a CCLS during the 2012-2013 fiscal year. (50 points)
- \_\_\_\_\_ I attended another association's monthly meeting, installation, or other function. (50 points)
- \_\_\_\_\_ I attended an educational workshop or seminar sponsored by SLSA or another local  
association. (25 points)
- \_\_\_\_\_ I attended an educational workshop or seminar sponsored by a Forum, CEB, or  
The Rutter Group. (25 points)
- \_\_\_\_\_ I am a member of at least one Legal Specialization Section. (50 points)
- \_\_\_\_\_ I am a member of all six Legal Specialization Sections as of March 31, 2013. (100 points)
- \_\_\_\_\_ I attended a Legal Specialization Section Seminar at Quarterly or Annual  
Conference. How many? \_\_\_\_\_. (50 points per seminar)
- \_\_\_\_\_ 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 purchased the *Legal Professional's Handbook* (LPH) between April 1, 2012, and  
March 31, 2013. (200 points)
- \_\_\_\_\_ I purchased the *Law Office Procedures Manual* (LOPM) between April 1, 2012,  
and March 31, 2013. (200 points)
- \_\_\_\_\_ I purchased updates to the LPH between April 1, 2012, and March 31, 2013. (100 points)
- \_\_\_\_\_ I purchased updates to the LOPM between April 1, 2012, and March 31, 2013. (100 points)

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

If you have any questions or would like to email this form, you can reach the Governor at [governor@slsa.org](mailto:governor@slsa.org), otherwise you can mail this form to:

Sacramento LSA  
Attn: Melanie Herman, Governor  
Perkins & Associates  
300 Capitol Mall, Ste. 1800  
Sacramento, CA 95814

For removal from this fax list, please email [president@slsa.org](mailto:president@slsa.org).



# Sacramento Legal Secretaries Association

## Dinner Meeting - May 10, 2012



### What Every Estate Planning Attorney Wants Their Staff to Know

**Jennifer S. Rouse, Esq.**  
Certified Specialist in Estate Planning, Trust,  
& Probate Law

Vendor of the Month:  
DeMichelle Deposition Reporters

5:30 – 6:15 p.m. Meet & Greet  
6:15 – 8:00 p.m. Dinner Meeting  
**Courtyard Marriott - Midtown Sacramento**  
4422 Y Street, Sacramento  
**\$25 SLSA Members\*/\$28 Non-Members\***

**R.S.V.P. by May 9.** Checks should be made payable to SLSA, and mailed to: Maimie Chyinski, Registration/Reception Chair 2011-2012, SLSA, c/o Fagen Friedman & Fulfroost, LLP, 520 Capitol Mall, Ste. 400, Sacramento, CA 95814; or fax: 916-443-0030; or email to: [reservations@slsa.org](mailto:reservations@slsa.org). You may also register online at [www.slsa.org](http://www.slsa.org). Please add \$3 for reservations made after May 9. **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, 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.

**Buffet Style: South of the Border**

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

EMAIL: \_\_\_\_\_

TEL: \_\_\_\_\_ FAX: \_\_\_\_\_

Do you require an  MCLE or  CCLS certificate?

- Spicy Chicken Tortilla Soup
- Chips and salsa
- Seasoned shredded beef and chicken fajitas with warm flour tortillas
- Cheese enchiladas
- Mixed Greens Topped with cheese, black beans, roasted yellow corn, and diced tomatoes, jalapeno ranch dressing
- Assorted gourmet brownie bars

Are you an SLSA member?  YES  NO

If "No", are you interested in membership?  YES  NO

Are you interested in volunteering with SLSA?  YES  NO

# Announcing

## The 2012 Edition of Introduction to California Civil Litigation (Emphasizing Superior Court Cases)

by Brenda Thomas Wilson, J.D.

Used as both a textbook and a reference book for over a decade, this 404-page edition focuses on the procedural aspects of civil litigation before trial in California superior court cases. Various forms, documents, and rules are explained, with many examples based on the Sacramento Superior Court local rules to show how the general aspects of litigation are specifically implemented through the application of both state and local rules. In a practical “nuts and bolts” approach, key information is provided on major topics, and tips that can only be learned through experience are shared. Contents in the latest edition, updated with rules and statutes effective January 1, 2012, include:

- ▶ Requirements for filing and methods of serving documents
- ▶ Civil case management rules, including Sacramento Superior Court’s requirements
- ▶ Definitions of foreign words and phrases, general legal terms, symbols, jargon, and acronyms
- ▶ Basic elements of letters, use of boilerplate forms, and requirements for formatting pleading paper
- ▶ Discovery documents and procedures with California Electronic Discovery Act provisions
- ▶ Motions, including formatting, filing, service, tentative rulings, and court orders, with specific information for motions filed in Sacramento Superior Court
- ▶ Basic calendaring demystified with step-by-step illustrations, sample entries, and timeline summaries

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**2012 Introduction to CA Civil Litigation** @ \$76.50 each, plus \$\_\_\_\_\_ for mailing,\* for a total of \$\_\_\_\_\_

*\*Priority mailing costs: one book = \$6.00; two books = \$7.50; three books = \$9.00; 4+ books = No charge  
Prices include sales tax!*

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Telephone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

# Parliamentarian Workshop

April 18, 2012



*Pictured from l to r: Lorenzo Cuesta, Melanie Herman, Dawn Forgeur, CCLS,  
Deseree Gamayo, Maimie Chyinski, Lynne Gomes.*

# Just Who Do You Think We Are?

by Lynne Gomes

**H**ave you ever wondered who we are as an association? What practice areas do our members represent in the greater Sacramento region? Are you part of the majority, or are you in a very specialized practice area?

Based on the practice areas members stated they work in, SLSA recently put together the following data, which shows just who we are!

Litigation	=	52%
Corporate/Business Law	=	13%
Real Estate/Transactional Law	=	9%
Probate/Estate Planning	=	6%
Administrative Law	=	6%
Family Law	=	5%
Labor & Employment Law	=	5%
Law Office Management/Admin.	=	3%
Other*	=	1%



\*Includes Federal Law, Appellate Law, Tax Law, Workers Compensation, Governmental, Legislative, Regulatory, Construction Defect, Personal Injury, Criminal, Bankruptcy, and Environmental.

Note: Most SLSA members work in more than one practice area.



## To Sacramento LSA's Newest CCLS -- Liz Gideon

Our *bulletin editor extraordinaire*, Liz Gideon, passed the California Certified Legal Secretary Examination in March 2012. We are thrilled for Liz and proud of her for achieving this very distinguished honor.

### *Congratulations, Liz Gideon, CCLS!*



# April Regular Meeting Speaker Spotlight: Judge David I. Brown, Sacramento Superior Court, Law and Motion Dept.

by Dawn Forgeur, CCLS

“Probably 20% of all matters get dropped for bad service... ~Judge Brown”

Our guest speaker for April was Judge David I. Brown from the Sacramento Superior Court, Law and Motion Department 53. This was Judge Brown’s first time speaking to Sacramento LSA and even though he was feeling a bit under the weather, he did a fabulous job. A few facts that we found out about Judge Brown. He spent 34 years as a civil trial attorney before being appointed by the Governor in 2008 to the bench. He also knows how to take shorthand and often uses it in the courtroom when in session and oftentimes the tentative rulings are typed by Judge Brown himself. Each Law and Motion judge has three dedicated research attorneys who do send their assessment of what the tentative ruling should be to the Judges, but of course the final ruling is up to the Judge.

Telephonic appearances are encouraged. Judges do not get upset if you don’t appear in person.

Make sure the exhibits are attached!

Do not just refer to previously filed documents – attach them again as a new exhibit.

Make sure important text is legible on the exhibits. Sometimes a color copy (even of a black and white document) give a better product for the Judge to look at.

Judicial Notice – attach the document that you want to be judicially noticed.

The caption of the motion is critical! If you are asking for sanctions, make sure you put it in the caption.

When you ask for leave to amend, make sure you have attached the amended pleading.

Ex Parte hearings – make sure that the memorandum of points and authorities is included.

Ex Parte hearings – The declaration must state that you have notified all parties of the motion hearing at least 24 hours prior to the hearing. This is specific to Department 53!

If the motion is dropped, let the Court know as soon as possible! You can even send a letter to the Court informing them of this.

I appreciate Judge Brown taking time out of his busy schedule to come talk to SLISA. He had a great deal of information to share with us and I hope to be able to have him back again.

Judge Brown talked to the research attorneys in the Law and Motion Department and had plenty of tips for us to take back to our offices and share with other staff and the attorneys. Here is a list of some of the points he made.

Probably 20% of all matters get dropped for bad service – double check those Court holidays, such as Cesar Chavez Day!

Notice of Motion, always identify the correct date and department.

Do NOT address motions to Judge McMaster!

Always include the tentative ruling language in the Notice of Motion.

Do not put arguments or citations into the footnotes – they may be missed.



Pictured from l to r: Dawn Forgeur, CCLS and Judge David I. Brown

# CCLS Terminology List

Beneficiary	One who received property from an estate, whether an heir or not.
Bequeath	To dispose of personal property by Will.
Codicil	A supplement to a Will. It may explain, modify, add to, subtract from, qualify, alter, restrain, or revoke provisions of the original Will.
Devise	A gift of real property by Will.
Executor	The person named in a Will to carry out the directions in the Will and to act as the representative of a decedent's estate. Also called the "personal representative."
Heir	One who is entitled to property of the decedent under the statutes of intestate succession.
Holographic Will	A Will in which the material provisions and the signature are in the handwriting of the testator.
Intestate	One who dies without a valid Will.
Testate	One who dies leaving a valid Will.
Will	Documents signed by a testator by which the testator disposes of his/her estate.

# CCLS Quiz Answers

## CCLS QUIZ ANSWERS (from page 10):

- |                     |                      |
|---------------------|----------------------|
| 1. False, LOPM J-11 | 6. True, LOPM J-14   |
| 2. True, LOPM J-11  | 7. False, LOPM J-12  |
| 3. False, LOPM J-15 | 8. True, LOPM J-14   |
| 4. False, LOPM J-12 | 9. False, LOPM J-15  |
| 5. True, LOPM J-13  | 10. False, LOPM J-15 |





### Sacramento Legal Secretaries Association Membership Renewal Invoice

**Membership Period: May 1, 2012 – April 30, 2013**  
**Due Date: May 1, 2012**

Make check payable to:  
**Sacramento Legal Secretaries Association**

Amount Due: **\$40**  
Renewals are due May 1, 2012.  
There will be a late fee of \$5 after June 1, 2012.

Return the completed invoice and full payment to:  
**Deseree Gamayo, Treasurer**  
**Sacramento Legal Secretaries Association**  
**c/o Stone & Graves**  
**2377 Gold Meadow Way, Ste. 210**  
**Gold River, CA 95670**

**MEMBER INFORMATION (PLEASE PRINT LEGIBLY):**

**NAME:** \_\_\_\_\_

**BIRTHDAY:** \_\_\_\_\_

**TITLE:** \_\_\_\_\_

**EMPLOYER:** \_\_\_\_\_

**BUSINESS ADDRESS:** \_\_\_\_\_

**CITY, STATE & ZIP:** \_\_\_\_\_

**BUSINESS PHONE:** \_\_\_\_\_

**BUSINESS FAX:** \_\_\_\_\_

**BUSINESS E-MAIL:** \_\_\_\_\_ (for vital updates/reminders)

**RESIDENCE ADDRESS:** \_\_\_\_\_

**CITY, STATE & ZIP:** \_\_\_\_\_

**RESIDENCE PHONE:** \_\_\_\_\_

**RESIDENCE E-MAIL:** \_\_\_\_\_ (for vital updates/reminders)

**YOUR SPECIALTY:**

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Administrative Law      | <input type="checkbox"/> Appellate Law        | <input type="checkbox"/> Bankruptcy            |
| <input type="checkbox"/> Corporate Law           | <input type="checkbox"/> Criminal Law         | <input type="checkbox"/> Environmental         |
| <input type="checkbox"/> Family Law              | <input type="checkbox"/> Labor and Employment | <input type="checkbox"/> Law Office Management |
| <input type="checkbox"/> Legal Support           | <input type="checkbox"/> Litigation           | <input type="checkbox"/> Personal Injury       |
| <input type="checkbox"/> Probate/Estate Planning | <input type="checkbox"/> Real Estate          | <input type="checkbox"/> Other: _____          |

**MAILING/LISTING INFORMATION:**

Where do you want your SLSA/LSI mail delivered?  Business  Residence

Where do you want e-mail delivered?  Business  Residence

Which address should be listed in the membership roster?  Business  Residence

If you do NOT want to be listed in the membership roster, check here:  No roster listing

**INVOLVEMENT:**

Have you been awarded lifetime membership in SLSA? (If yes, return form only w/out dues)  Yes  No

Are you interested in volunteering as a committee chairperson or co-chairperson?  Yes  No

What topics and speakers would benefit you most this coming year? \_\_\_\_\_

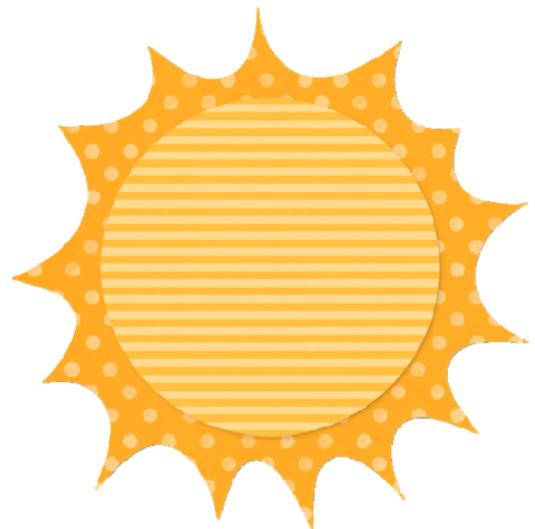
<b>SLSA USE ONLY</b>	Date Received: _____	On Roster: _____
	Check no.: _____	On LSI: _____
	On Email List: _____	To Editor: _____

# May 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10 <i>Regular Dinner Meeting</i>	11	12
13	14	15	16	17 <i>LSI 78th Annual Conference</i>	18 <i>LSI 78th Annual Conference</i>	19 <i>LSI 78th Annual Conference</i>
20 <i>LSI 78th Annual Conference</i>	21 <i>Last Day to Submit Articles for Bulletin</i>	22	23	24	25	26
27	28	29	30	31		

## Dates to Remember

- **May 7 - SLSA Executive Board Meeting**  
*(Location: Stool Rives - Time: 6:00 p.m.)*
- **May 10 - Regular Dinner Meeting** *(Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)*
- **May 17-20—LSI 78th Annual Conference**  
*(Location: Babia Resort Hotel—998 W. Mission Drive, San Diego, CA)*
- **May 21 - Last Day to Submit Articles for the June issue of The Legal Eagle**
- **June 12 - SLSA Executive Board Meeting**  
*(Location: Stool Rives - Time: 6:00 p.m.)*
- **June 21 - Regular Dinner Meeting** *(Location: Courtyard Marriott—Midtown, 4422 Y Street, Sacramento, CA, 5:30 p.m.)*
- **June 25 - Last Day to Submit Articles for the July issue of The Legal Eagle**



# April Regular Meeting Vendor Spotlight: Capitol Digital Document Solutions

by Lynne Gomes



Please remember to support our vendors, because they support us!!

~Lynne Gomes



For more than 10 years, leading law firms, corporations and government agencies have relied upon Capitol Digital Document Solutions to provide expert litigation support services and manage their paper and electronic document productions. Capitol Digital provides electronic evidence processing, scanning, photocopying, document hosting and document indexing. They support projects from small copy jobs to processing terabytes of electronic data, for a range of clients from local law firms to mega-corporations, from a single attorney to collaborations involving numerous co-counsel and multiple experts. Capitol Digital provides speed, quality and reasonable cost, and work with their clients to understand their needs and fulfill their requirements.

Capitol's reputation and stability have been built on a foundation of "quality first" processes,

state-of-the art technology, a superior group of litigation support veterans, and superior management, organized into an operations team that is dedicated to providing the best possible service and deliverable products. They confidently stand behind their work with a simple philosophy --

"Deliver it right the first time."

Thank you very much to Ron Bodenmann and the team at Capitol Digital Document Solutions for being at our April meeting and talking to us about the services Capitol provides, as well as being SLISA's Vendor of the Month!

For more information on Capitol Digital Document Solutions, please contact:

Ron Bodenmann or  
Dave Wilkinson

Capitol Digital  
Document Solutions  
(916) 449-2820

Or visit their website for a complete list of services at [www.capitol-digital.com](http://www.capitol-digital.com).



Ron Bodenmann



## Legal Procedures (cont.)

by Lynne Gomes

### “Hallway” Meetings

Are the attorneys in your office famous for having “hallway conferences?” In other words, they happen to meet in the hall and end up conferencing or strategizing about a case? If your office is set up like mine, you are usually right in the line of sight or within earshot of that “conference.” Make a note of it and ask your attorney later if they want to include that on their timesheet.

### Automated Software “Start/Stop” Feature

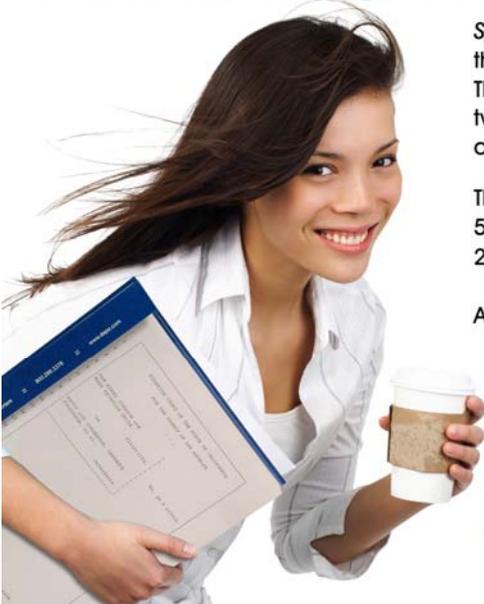
Most automated time entry software has a “stopwatch” feature that, with a click of the mouse, allows the attorney or paralegal to start recording their time when working on research, drafting documents, dictating, conducting calls, etc. It will even associate that time with the specific client or case, so that you only have to go back and fill in the description later. Another click of the mouse stops the clock and gives you an accurate accounting of the time spent on that particular task. This is a great tool for those timekeepers who are very tech-savvy and

love using a computer and software to its fullest potential. While this is a very handy feature, you do have to pay attention and remind yourself to turn this feature on and off. Otherwise, your attorney could start the clock for a conference call, hang up the phone and go to lunch, completely forgetting that the clock is still running. You or your attorney would definitely have to exercise a little discipline when using this feature!

Finally, the most important tip for any timekeeper is to make time entry a priority. The timekeeper must be consistent and disciplined about entering time so that it is accurately and honestly captured. The attorney or paralegal should be recording their time every single day so that they do not have to play “catch up” at the end of the month. The workload in a law office is in constant flux, and having to enter and recapture large chunks of time at the end of the month is disruptive and unproductive for everyone involved.



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Imperial County Legal Professionals Association  
and  
San Diego Legal Secretaries Association

celebrate the 50s with

# HAPPY DAYS

Legal Secretaries, Incorporated's 78th Annual Conference



Bahia Resort Hotel  
998 W. Mission Bay Drive, San Diego, CA 92109



May 17-20, 2012



## CONFERENCE REGISTRATION FORM



NAME (AS IT WILL APPEAR ON BADGE): \_\_\_\_\_  
MAILING ADDRESS: \_\_\_\_\_  
CITY/STATE/ZIP: \_\_\_\_\_  
TELEPHONE: \_\_\_\_\_  
EMAIL ADDRESS: \_\_\_\_\_  
LOCAL ASSOCIATION (DO NOT ABBREVIATE): \_\_\_\_\_

PLEASE CHECK IF APPLICABLE (INCLUDE TITLE):

STATE OFFICER: \_\_\_\_\_  
STATE CHAIRMAN: \_\_\_\_\_

GOVERNOR     CCLS     PLS     DELEGATE     ALTERNATE DELEGATE

**SCRIP TICKET** (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET, AND BRUNCH):

	<u>BY CHECK</u>	<u>BY PAYPAL</u>	\$
POSTMARKED ON OR BEFORE APRIL 15, 2012	\$127.00	\$130.99	\$ _____
POSTMARKED ON OR AFTER APRIL 16, 2012	\$137.00	\$141.28	\$ _____

**INDIVIDUAL TICKETS:**

REGISTRATION ON OR BEFORE APRIL 15, 2012	___ @	\$20.00	\$20.88	\$ _____
REGISTRATION ON OR AFTER APRIL 16, 2012	___ @	\$30.00	\$31.17	\$ _____
GOVERNORS' LUNCHEON (FRIDAY)	___ @	\$25.00	\$26.03	\$ _____
PRESIDENTS' LUNCHEON (FRIDAY)	___ @	\$25.00	\$26.03	\$ _____
NEWCOMERS' LUNCHEON (FRIDAY)	___ @	\$25.00	\$26.03	\$ _____
WELCOME RECEPTION (FRIDAY)	___ @	\$25.00	\$26.03	\$ _____
CCLS LUNCHEON (SATURDAY)	___ @	\$27.00	\$28.09	\$ _____
BANQUET (SATURDAY)	___ @	\$60.00	\$62.04	\$ _____
<input type="checkbox"/> PRIME RIB <input type="checkbox"/> SALMON <input type="checkbox"/> VEGETARIAN				
BRUNCH (SUNDAY)	___ @	\$28.00	\$29.12	\$ _____

TOTAL AMOUNT PAID: \$ \_\_\_\_\_

SPECIAL DIETARY REQUEST (INCLUDING VEGETARIAN): \_\_\_\_\_

MAKE CHECKS PAYABLE TO:  
SEND TO:

**2012 ANNUAL CONFERENCE FUND**  
ESPERANZA LARIOS, P.O. BOX 3805, EL CENTRO, CA 92244

TO PAY BY PAYPAL:

[WWW.SDLSA.ORG](http://WWW.SDLSA.ORG) (PAYMENT INCLUDES TRANSACTION FEE)

<p><b>LEGAL SPECIALIZATION SECTION SEMINARS</b>  <b>Annual Conference – May 2012 - Bahia Resort, San Diego</b>  <b>Host: Imperial County LPA and San Diego LSA</b>  <b>REGISTRATION FORM - DEADLINE IS FRIDAY, May 11, 2012</b>                  Registration <b>MUST</b> be <b>RECEIVED</b> by each Section Leader <b>on or before the deadline.</b>  <b>Please make advance reservations so materials may be prepared. Please check appropriate boxes below.</b>                  Mail, Fax or E-Mail a copy of this form to <b>each</b> corresponding Section Leader.                  Send a self-addressed, stamped envelope if you wish confirmation of your reservation.  <b>PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"</b></p>	
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LSI SECTION MEMBER: Free with Advanced Reservations \$5.00 at the Door/After Deadline Handout Only: \$5.00	LSI NON-SECTION MEMBER: \$10.00 with Advanced Reservation \$15.00 at the Door/After Deadline Handout Only: \$10.00	NON-LSI MEMBER: \$15.00 with Advanced Reservation \$20.00 at the Door/After Deadline Handout Only: \$15.00
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**Friday, May 18, 2012 – 1:30 to 3:30 p.m.**

<p><b>TRANSACTIONAL LAW:</b>                  Topic: <i>Consumer Law and the Secrets of Car Buying</i>                  Speaker: John W. Hanson, Esq.</p> <p style="text-align: center;"> <input type="checkbox"/> I will attend                       <input type="checkbox"/> Section Member                       <input type="checkbox"/> Non-Section Member  <input type="checkbox"/> Non-LSI Member                       <input type="checkbox"/> Handout Only                 </p> <p><b>Send to:</b> Belinda Owens, Transactional Law Section Leader                  3163 Easy Street, San Diego, CA 92105                  (W) 858-410-8951 (C) 619-261-9323 (F) 858-410-7878                  Email: bowens0913@aol.com</p>	<p><b>PROBATE/ESTATE PLANNING :</b>                  Topic: <i>To Inventory and Beyond</i>                  (From Inventory to Distribution in a Probate Estate)                  Speaker: Patricia Miller, PLS, CCLS and Mary Rocca, CCLS</p> <p style="text-align: center;"> <input type="checkbox"/> I will attend                       <input type="checkbox"/> Section Member                       <input type="checkbox"/> Non-Section Member  <input type="checkbox"/> Non-LSI Member                       <input type="checkbox"/> Handout Only                 </p> <p><b>Send to:</b> Linda Moore, CCLS, Probate/Estate Planning Section Leader                  Stutz, Artiano, Shinoff &amp; Holtz                  2488 Historic Decatur Road, Suite 200                  San Diego, CA 92106                  (O) 619-232-3122 x404 (F) 619-232-3264 (C) 619-723-5336                  Email: lmoore@stutzartiano.com</p>
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**Friday, May 18, 2012 – 4:00 to 6:00 p.m.**

<p><b>FAMILY LAW:</b>                  Topic: <i>How Using A Licensed Private Investigator Can Help Your Legal Cases</i>                  Speaker: Dan Krotzer, Knox Attorney Service</p> <p style="text-align: center;"> <input type="checkbox"/> I will attend                       <input type="checkbox"/> Section Member                       <input type="checkbox"/> Non-Section Member  <input type="checkbox"/> Non-LSI Member                       <input type="checkbox"/> Handout Only                 </p> <p><b>Send to:</b> Judith Williams, Family Law Section Leader                  2368 Lincoln Street, Suite A, Oroville, CA 95966                  (O) 530-534-8973 (F) 530-534-6551                  Email: PWPLGL2@yahoo.com</p>	<p><b>CRIMINAL LAW:</b>                  Topic: <i>Introduction into the Federal Criminal Justice System</i>                  Speaker: Francisco J. Sanchez, Esq.</p> <p style="text-align: center;"> <input type="checkbox"/> I will attend                       <input type="checkbox"/> Section Member                       <input type="checkbox"/> Non-Section Member  <input type="checkbox"/> Non-LSI Member                       <input type="checkbox"/> Handout Only                 </p> <p><b>Send to:</b> Linda Lane, Criminal Law Section Leader                  P. O. Box 12582, La Crescenta, CA 91224                  (H) 818-248-0739 (C) 818-434-6600                  Email: l.lane44@yahoo.com</p>
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**Saturday, May 19, 2012 – 4:00 to 6:00 p.m.**

**CIVIL LITIGATION and LAW OFFICE ADMINISTRATION (joint seminar):**  
 Topic: *Ethics*  
 Speaker: Patrick J. Kearns, Esq. of Wilson, Elser, Moskowitz, Edelman & Dicker, LLP

I will attend  
  Section Member (of either Civil Litigation Section or Law Office Administration Section)  
  Non-Section Member  
 Non-LSI Member  
  Handout Only

**Send to:** Denise Aguilar, CCLS, Civil Litigation Section Leader  
 8279 Philodendron Way, Buena Park, CA 90620-2120  
 (H) 714-670-0215  
 Email: daguilar57@att.net

Name: \_\_\_\_\_ PLS/CCLS/CL/Paralegal/Attorney E-mail: \_\_\_\_\_

Address/City/State: \_\_\_\_\_

Phone: (Work) \_\_\_\_\_ (Home) \_\_\_\_\_ Local Assn.: \_\_\_\_\_ LSA/LPA

Method of Payment:  Check  Credit Card Number \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Name on Credit Card: \_\_\_\_\_ Type of Card: Visa \_\_\_ M/C \_\_\_ AmEx \_\_\_ Card Verification \_\_\_\_\_

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 CHECK.  
 The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1.75 hours each, by the State Bar of California.

# California Certified Legal Secretary

A Program of  
Legal Secretaries, Incorporated



## APPLICATION

Please complete and mail this form to the following address with your check to reserve your place at one of the examination venues:

**CCLS Certifying Board  
24740 Oro Valley Road  
Auburn, CA 95602**

<input type="checkbox"/> Northern California  <input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, March 17, 2012  <input type="checkbox"/> Saturday, October 20, 2012
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Deadline: Application must be received 60 days prior to examination date. A late application may be accepted up to 30 days prior to the examination if submitted with a \$25 late fee, in addition to the fees listed below, if space is available.

EXAMINATION FEES*			
	<b>LSI MEMBERS**</b>		<b>Non-LSI MEMBERS</b>
	Registration fee: \$ 15.00		Registration fee: \$ 55.00
	Examination fee: \$ 95.00		Examination fee: \$ 95.00
	<b>Total \$110.00</b>		<b>Total \$150.00</b>

Enclosed is a check in the sum of \$ \_\_\_\_\_<sup>\*\*\*</sup>, payable to LSI.

\* Fees subject to change without notice.

\*\* LSI members: Name of local association: \_\_\_\_\_ LSA/LPA.  
**Please enclose a photocopy of your local membership card.**  
You must be a member upon application to be eligible for reduced fees.

\*\*\* Include \$25 late fee if applicable.

Name \_\_\_\_\_ Last 4 Digits of SSN \_\_\_\_\_

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

City/State/Zip: \_\_\_\_\_

Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

E-mail(s): \_\_\_\_\_

Highest level of formal education completed: \_\_\_\_\_; Highest Degree: \_\_\_\_\_.

EMPLOYMENT RECORD: Please list legal secretarial employment, beginning with your most recent (or current) employment, to show a minimum of two full years of such employment. Attach a supplemental page if additional entries are necessary to show two full years of employment as a legal secretary.

Dates \_\_\_\_\_ Position \_\_\_\_\_

Employer \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Supervisor \_\_\_\_\_ Phone \_\_\_\_\_

Summary of Duties \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Dates \_\_\_\_\_ Position \_\_\_\_\_

Employer \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Supervisor \_\_\_\_\_ Phone \_\_\_\_\_

Summary of Duties \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I certify that I have completed this application truthfully. I understand that a false statement may result in the rejection of this application or revocation of my certification. I understand and agree that the contents of the examination are confidential and are not to be discussed. I understand that my employment record will be verified by a member of the California Certified Legal Secretary Certifying Board.

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

# LEGAL SPECIALIZATION SECTIONS Of LEGAL SECRETARIES, INCORPORATED

## 2011-2012 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.

Mail to: **Cheryl L. Kent, PLS, CCLS, Legal Specialization Sections Coordinator**  
5534 Blackbird Drive, Pleasanton, CA 94566

Enclosed is payment of my dues for the fiscal year 8/1/11 through 7/31/12 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  AMEX

**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 CHECK.

NEW	RENEWAL

- Civil Litigation
- Criminal Law
- Family Law
- Law Office Administration
- Probate/Estate Planning
- Transactional Law



(PLEASE PRINT OR TYPE)

NAME: MR./MRS./MS. \_\_\_\_\_ PLS/CCLS/CLA/PARALEGAL

ADDRESS/CITY/STATE/ZIP \_\_\_\_\_

LOCAL ASSOCIATION: \_\_\_\_\_ LSA/LPA

RESIDENCE PHONE ( ) \_\_\_\_\_ BUSINESS PHONE: ( ) \_\_\_\_\_

E-MAIL ADDRESS(ES): \_\_\_\_\_

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):  
\_\_\_\_\_

# Happy May Birthdays!!



Micky Kelly, CCLS  
Teresa Patterson  
Deseree Gamayo  
Diane Gee  
Jennifer Shelton  
Gina Pagala

May 6  
May 7  
May 11  
May 11  
May 13  
May 16

Teri McClory, CCLS  
Shirley Rita  
Kellyann Petty  
Ann Edwards  
Amy Dare

May 17  
May 17  
May 19  
May 20  
May 29

## LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	UNIT PRICE	QUANTITY	TOTAL
<b>BRASS TACKS*</b> A guide instructing local officers and chairmen on how to perform their respective duties. Contains check lists, calendars and forms. (Rev. 1/2010) No charge for PDF [ ] Send hard copy [ ]	\$ 5.00		\$
<b>CAREER PROMOTION/SCHOLARSHIP <i>NOT JUST A SECRETARY</i> BOOKLET</b> Currently under revision and not available at this time			
<b>CCLS BROCHURE</b> Tri-fold brochure promoting the benefits of taking the CCLS Exam. Includes tear-off to request application form and information kit. (Rev. 2/08)	N/C		
<b>CCLS MOCK EXAM (Revised 2010)</b> Sample questions and answers to assist in preparing for all sections of the CCLS Exam.	25.00		
<b>CCLS PIN</b> A ½" high, 10-karat gold-filled pin with CCLS logo. For the CCLS.	35.00		
<b>CCLS STUDY KIT</b> Contains Mock Exam (see above), Gregg Reference Manual with Instructor's Resource Guide, Basic and Comprehensive Worksheets.	199.00		
<b>GUIDELINES FOR HOSTING LSI CONFERENCES*</b> An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI Conference. (Rev. 12/09)	N/C		
<b>GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM</b> A 34-page guide, with sample forms, to assist with the planning and execution of a successful legal educational program. (Rev. 8/03)	5.00		
<b>HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND GUIDELINES*</b> 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. 11/08)	5.00		
<b>HISTORY OF LEGAL SECRETARIES, INCORPORATED</b> A 50-page memory of people, places and events since 1929. (Rev. 3/2010)	5.00		
<b>LAW OFFICE PROCEDURES MANUAL FLYER</b> An 8 ½" x 11" advertisement of the LOPM. Includes listing of contents and Order Form. (Rev. 1/2010)	N/C		
<b>LAW OFFICE PROCEDURES MANUAL INSTRUCTOR'S GUIDES</b> 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		
ADOPTIONS CHAPTER (Rev. 6/11)	7.00		
CIVIL PROCEDURE CHAPTER (Rev. 9/07)	7.00		
CONSERVATORSHIP CHAPTER (Rev. 6/11)	7.00		
CORPORATIONS CHAPTER (Rev. 6/11)	7.00		
COURT STRUCTURE CHAPTER (Rev. 9/07)	7.00		
CRIMINAL LAW CHAPTER (Rev. 9/07)	7.00		
DISCOVERY CHAPTER (Rev. 6/11)	7.00		
FAMILY LAW CHAPTER (Rev. 6/11)	7.00		
PROBATE CHAPTER (Rev. 9/07)	7.00		
REAL ESTATE CHAPTER (Rev. 6/11)	7.00		
UNLAWFUL DETAINER CHAPTER (Rev. 6/11)	7.00		
WORKERS' COMPENSATION CHAPTER (Rev. 9/07)	7.00		
MISCELLANEOUS CHAPTER (Rev. 6/11)	7.00		
<b>LEGAL SECRETARY'S REFERENCE GUIDE</b> A legal procedure guide designed to assist local associations in conducting a training class. Also useful for training office personnel and as a general reference for experienced staff. (Rev. 11/09)	30.00		
<b>LSI BYLAWS AND STANDING RULES*</b> As currently adopted by the LSI Governors.	5.00		
<b>TOTAL THIS PAGE</b>			<b>\$</b>

\*Item available to LSI members only.

(Prices effective 07/01/2011)

**LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM**

ITEM	UNIT PRICE	QUANTITY	TOTAL
LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER An 8 1/2" x 11" advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/2010)	\$ N/C		
LSI LEGAL SPECIALIZATION SECTIONS BROCHURE Lists Sections offered and reasons for joining. Includes Section Membership Application. (Rev. 2/08)	N/C		
LSI MEMBERSHIP BROCHURE Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application. (Rev. 2/08)	N/C		
LSI MEMBERSHIP PIN* (Magnetic) A 3/4" high oval gold-tone pin with blue and white enamel overlay. LSI logo in center and "Legal Secretaries, Incorporated" inscribed on circumference. For all LSI members.	5.00		
LSI ROSTER* Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.	N/C		
MEMBERSHIP APPLICATION FORM* An 8 1/2" x 11" form adopted 5/01 by LSI for use by all local associations. Includes request for Legal Specialization Sections information. Local associations may add second-page for supplemental information. (Rev. 5/08) Can be transmitted as an e-mail attachment (Word format), if so requested.	N/C	<input type="checkbox"/> E-mail -or- <input type="checkbox"/> Printed	
NEW MEMBER PACKET* A 2-pocket folder containing letter from LSI President, 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.	N/C		
PRESIDENT'S PENDANT* A 1" high oval gold-tone pendant with blue and white enamel overlay. LSI logo in center and "Legal Secretaries Association" inscribed on circumference. Eye for necklace chain on back. For local association presidents.	7.00		
PRESIDENT'S PIN* Same as pendant (see above). Specify magnetic or pin back. [ ] Magnetic [ ] Pin back closure	7.00		
TOTAL THIS PAGE			\$
TOTAL PREVIOUS PAGE +			\$
TOTAL ORDER =			\$
MAILING/SHIPPING AND HANDLING (15% OF TOTAL ORDER) +			\$
SUB-TOTAL, INCLUDING MAILING/SHIPPING AND HANDLING =			\$
CALIFORNIA SALES TAX (7.25% OF SUB-TOTAL ABOVE) +			\$
<b>TOTAL DUE =</b>			<b>\$</b>

PLEASE LIMIT THE QUANTITIES OF NO-CHARGE ITEMS ORDERED TO MINIMAL IMMEDIATE REQUIREMENTS. COMPLETE PAYMENT INFORMATION BELOW AND MAIL COMPLETED ORDER FORM TO LEGAL SECRETARIES, INCORPORATED, CORPORATE OFFICE, PO BOX 660, FORTUNA, CA 95540-0660; OR, FAX TO (707) 682-6888. CHECK OR CREDIT CARD INFORMATION MUST BE INCLUDED. ORDER WILL BE MAILED OR SHIPPED WITHIN 10 DAYS OF RECEIPT, SUBJECT TO AVAILABILITY.

**DELIVER TO:** NAME \_\_\_\_\_ ASSOCIATION \_\_\_\_\_

ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

DAY TELEPHONE (\_\_\_\_\_) \_\_\_\_\_ E-MAIL \_\_\_\_\_

**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** \_\_\_\_\_

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\*Item available to LSI members only.

(Prices effective 07/01/2011)

## BENEFITS

### LEGAL SECRETARIES INCORPORATED (LSI)

*Note: This list is maintained for use by members of Legal Secretaries, Inc. Agents for insurance and financial providers are available as resources when members inquire about benefits. Please use this as a starting point; ask for information, compare policy coverage and prices. LSI wants its members to find the BEST coverage for each member—individual needs and location. For information call these representatives directly.*

<p style="text-align: center;"><b>DISCOUNT THROUGH CEB</b></p> <p>Members of Legal Secretaries, Incorporated are offered a reduced cost for certain educational benefits (seminars, publications) through Continuing Education of the Bar. For more information, visit <a href="http://ceb.com/LSI/">http://ceb.com/LSI/</a></p>	<p style="text-align: center;"><b>WORKING ADVANTAGE</b></p> <p>Toll Free: (800) 565-3712  <a href="http://www.workingadvantage.com">www.workingadvantage.com</a>            Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more.            Member ID: Contact LSI Corporate Office, <a href="mailto:lsiorg@suddenlink.com">lsiorg@suddenlink.com</a>, or LSI Vice President</p>
<p style="text-align: center;"><b>HERTZ CORPORATION</b></p> <p>Effective Date: June 1, 1996            CDP Card #447698            (800) 654-3131  <a href="http://www.hertz.com">www.hertz.com</a></p>	
<b>INSURANCE AND FINANCIAL PROVIDERS</b>	
<p style="text-align: center;"><b>AFLAC AND WORKER=S COMPENSATION QUOTES</b></p> <p><b>Steven C. Dannenberg (Independent Broker)</b>            11091 Rhyolite Drive, Suite 4            Redding, CA 96003            Direct: (530) 339-5889 - Office: (530) 243-9879            Fax: (530) 243-9880            E-mail: <a href="mailto:dannenberginsurance@gmail.com">dannenberginsurance@gmail.com</a>            Offering supplemental insurance for Accident, Sickness, Cancer, Dental, Hospital Indemnity and Heart Attack/Stroke.</p>	<p style="text-align: center;"><b>CAPITAL INVESTMENT ADVISERS</b></p> <p><b>Emerson J. Fersch, CFP, ChFC, CLU, CASL</b>            5000 E. Spring Street, Suite 200            Long Beach, CA 90815            Office: (562) 420-9009 or (877) 270-9342            Fax: (562) 420-9955  <a href="http://www.ciadvisers.com">www.ciadvisers.com</a>            Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>
<p style="text-align: center;"><b>DWORKIN INSURANCE SERVICES</b></p> <p><b>Earl Dworkin</b>            467 Hamilton Avenue, Suite 1            Palo Alto, CA 94301            Office: (650) 329-1330 or (800) 332-4313            Fax: (650) 329-9957  <a href="http://www.dworkininsurance.com">www.dworkininsurance.com</a>            Offering Individual and Family Medical Insurance, Travel Medical, Medicare Supplements, Dental Plans, and Part D Prescription Drug Plans</p>	<p style="text-align: center;"><b>LEGACY WEALTH MANAGEMENT</b></p> <p><b>Daniel R. Henderson, MBA, CFP</b>            3478 Buskirk Avenue, Suite 300            Pleasant Hill, CA 94523            Office: (925) 296-2853 or (877) 679-9784            Fax: (925) 944-5675            E-mail: <a href="mailto:daniel@legacywealthmanagement.biz">daniel@legacywealthmanagement.biz</a>  <a href="http://www.legacywealthmanagement.biz">www.legacywealthmanagement.biz</a>            Offering discounted John Hancock Long Term Care Insurance and Life Insurance, Annuities, Retirement, Investment and Estate Planning, Mutual Funds, and 401K.</p>
<p style="text-align: center;"><b>DAVID WHITE &amp; ASSOCIATES</b></p> <p><b>Wealth Accumulation and Preservation</b>            3150 Crow Canyon Place, Suite 2000            San Ramon, CA 94583            (800) 548-2671            Contact: Ryan Gonzales (ext. 2682), <a href="mailto:rgonzales@dwassociates.com">rgonzales@dwassociates.com</a>, or            Matt Kay (ext. 2628), <a href="mailto:mkay@dwassociates.com">mkay@dwassociates.com</a>            Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance.</p>	<p style="text-align: center;"><b>MWG FINANCIAL AND INSURANCE SERVICES</b></p> <p><b>Jory Wolf, President/Founder</b>            6333 Greenwich Drive, Suite 210            San Diego, CA 92122            Office: (858)888-7300            Cell: (510)919-9062  <a href="mailto:jory@mwgfinancial.com">jory@mwgfinancial.com</a>            California Insurance License: 0E88330            Individual disability insurance solutions</p>
<b>CREDIT UNIONS</b>	
<p style="text-align: center;"><b>LA FINANCIAL FEDERAL CREDIT UNION</b></p> <p>P.O. Box 6015            Pasadena, CA 91102-6015            (800) 894-1200  <a href="http://www.lafinancial.org">www.lafinancial.org</a>            Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p style="text-align: center;"><b>PROVIDENT CREDIT UNION</b></p> <p>303 Twin Dolphin Drive            P.O. Box 8007            Redwood City, CA 94603-0907            (800) 632-4699 - (650) 508-0300  <a href="http://www.providentcu.org">www.providentcu.org</a>            All LSI members are eligible to join.</p>

QUESTIONS AND CONCERNS CONTACT:  
 Sandra T. Jimenez, CCLS, LSI Vice President  
 LSI Marketing Committee Coordinator  
 P.O. Box 58, Seeley, CA 92273  
 Cell - (760) 604-3057

LEGAL SECRETARIES, INCORPORATED  
MEMBERSHIP LIST AS OF 1/31/12

Total Members (Fiscal Year-end 4/30/11)	Association		New Members	Transfer Members	Continuing Members	Total Members
42	Alameda County	LSA	3		34	37
0	Antelope Valley	LSA	2		8	10
50	Beverly Hills/Century City	LSA	3		39	42
22	Butte County	LPA	1		18	19
28	Capitol City	LPA	1		16	17
6	Conejo Valley	LPA	2		5	7
17	Desert Palm	LPA	6		15	21
16	El Dorado County	LPA	2		19	21
49	Fresno County	LPA	8	-1	38	45
48	Humboldt County	LPA	4		35	39
37	Imperial County	LPA	14		26	40
27	Livermore-Amador Valley	LPA	4		21	25
64	Long Beach	LSA	18		52	70
46	Los Angeles	LSA	7		36	43
17	Marin County	LPA	1		12	13
38	Merced County	LPA	7	1	33	41
14	Monterey County	LSA				0
62	Mt. Diablo	LPA	19		54	73
15	Napa County	LSA			13	13
78	Orange County	LSA	43		50	93
25	Palo Alto	LSA				0
39	Placer County	LPA	5		15	20
19	Redding	LPA			9	9
17	Rio Hondo District	LPA	6		15	21
20	Riverside	LPA	4		17	21
181	Sacramento	LSA	54		109	163
239	San Diego	LSA	59		146	205
34	San Fernando Valley	LSA	22		20	42
43	San Francisco	LPA	23		24	47
31	San Gabriel Valley	LSA	8		19	27
77	San Mateo County	LSA	7		60	67
26	Santa Barbara	LSA	4		22	26
59	Santa Clara County	LSA	33		46	79
8	Santa Cruz County	LPA			7	7
16	Santa Maria	LPA	5		7	12
39	Sonoma County	LSA	5		30	35
12	Southern Butte	LSA	4		8	12
36	Stanislaus County	LPA	2		36	38
29	Stockton-San Joaquin	LPA	6		42	48
4	Trinity County	LSA	0		4	4
22	Ventura County	LPA	3		20	23
36	Members at Large			-1		28
1688	<b>YTD TOTALS</b>					<b>1603</b>

Membership list as of 1/31/12



**Sacramento Legal Secretaries Association  
Name/Address Change Reporting Form**

Please fill out this form to let us know the changes you would like to make to your membership record.

**CHANGES IN MEMBER INFORMATION (PLEASE PRINT LEGIBLY):**

NAME: \_\_\_\_\_

FORMER NAME: \_\_\_\_\_

NEW EMPLOYER: \_\_\_\_\_

BUSINESS ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE & ZIP: \_\_\_\_\_

BUSINESS PHONE: \_\_\_\_\_

FAX: \_\_\_\_\_

BUSINESS E-MAIL: \_\_\_\_\_ (for vital updates/reminders)

NEW HOME ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_

STATE & ZIP: \_\_\_\_\_

HOME E-MAIL: \_\_\_\_\_ (for vital updates/reminders)

**CHANGE IN SPECIALTY:**

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Administrative Law     | <input type="checkbox"/> Appellate Law | <input type="checkbox"/> Arbitration             |
| <input type="checkbox"/> Business/Corporate Law | <input type="checkbox"/> Criminal Law  | <input type="checkbox"/> Family Law              |
| <input type="checkbox"/> Law Office Management  | <input type="checkbox"/> Litigation    | <input type="checkbox"/> Probate/Estate Planning |
| <input type="checkbox"/> Real Estate            | <input type="checkbox"/> Taxation      | <input type="checkbox"/> Other: _____            |

**CHANGES TO MAILING/LISTING INFORMATION:**

Where do you want *The Legal Eagle* and other SLSA/LSI mail delivered?

Where do you want e-mail delivered?

Which address should be listed in the membership roster?

If you do NOT want to be listed in the membership roster, check here:

- |  |                               |
|--|-------------------------------|
| <input type="checkbox"/> Business          | <input type="checkbox"/> Home |
| <input type="checkbox"/> Business          | <input type="checkbox"/> Home |
| <input type="checkbox"/> Business          | <input type="checkbox"/> Home |
| <input type="checkbox"/> No roster listing |                               |

Please submit to:

**Lynne Gomes**  
**SLSA Vice President and Membership Chair 2012-2013**  
**1201 K St., Ste. 1100**  
**Sacramento, CA 95814**  
**E-mail: vicepresident@slsa.org**

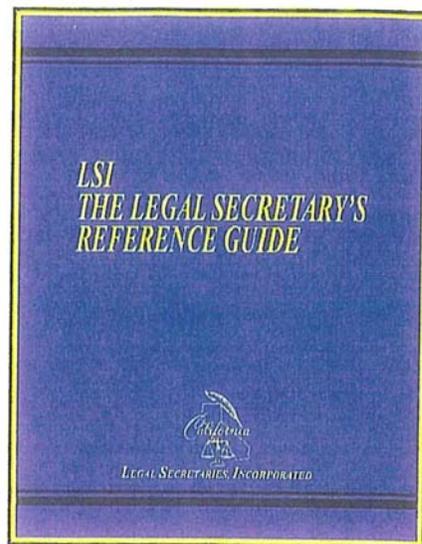
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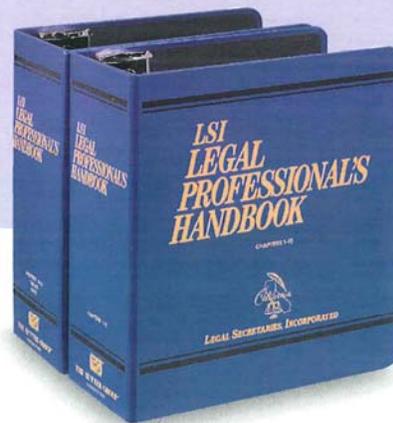
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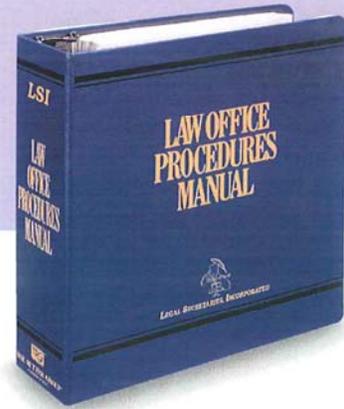
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by *Liz Gideon, CCLS*

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