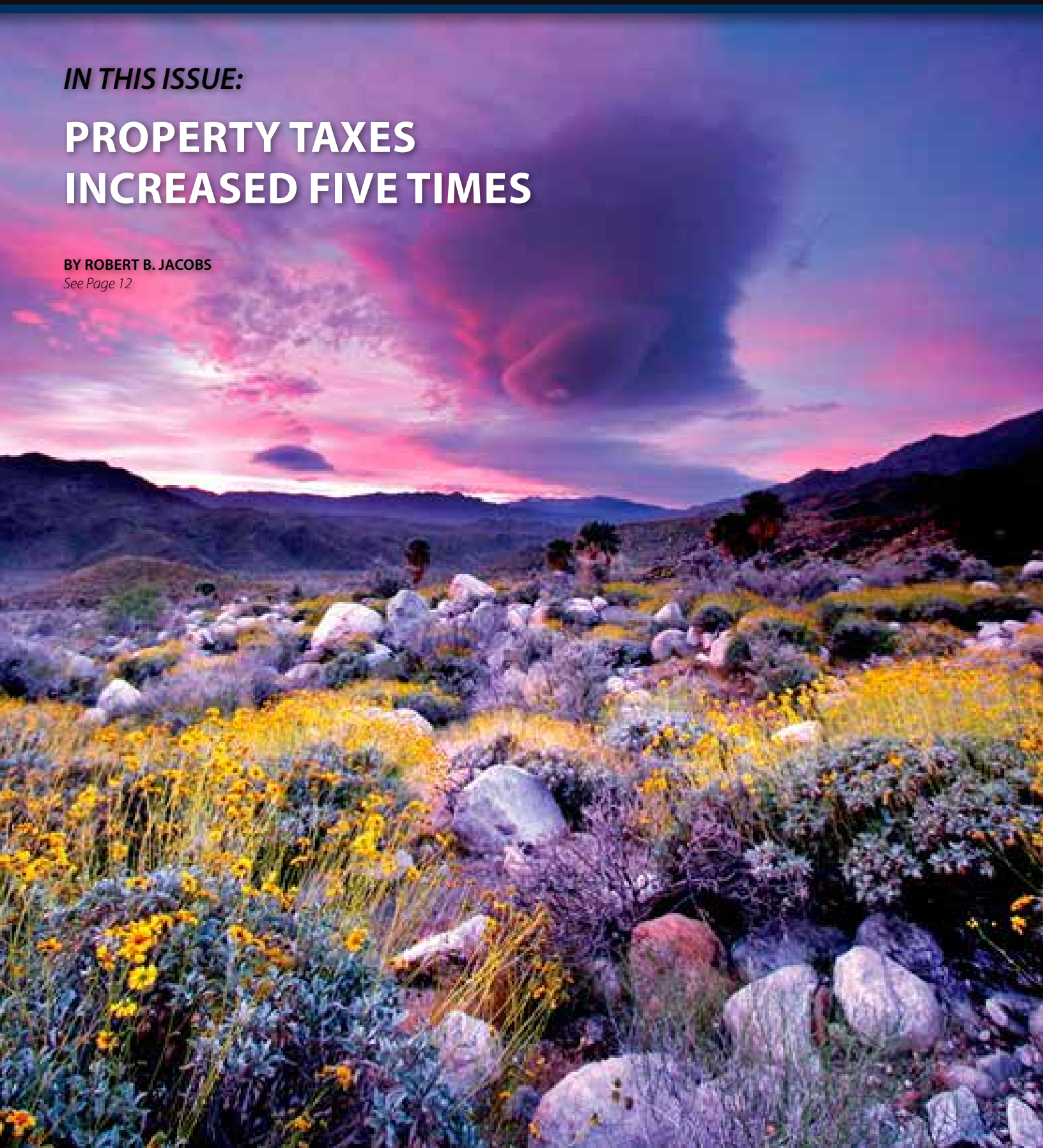


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PROPERTY TAXES INCREASED FIVE TIMES

BY ROBERT B. JACOBS

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Dedicated to LSI Past President, Joan M. Moore, PLS, CCLS

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Moving Onward and Upward in Unity

BY MARY J. BEAUDROW, CCLS



MARY J. BEAUDROW, CCLS

is President of Legal Secretaries, Incorporated and a member of Mt. Diablo Legal Professionals Association. Mary has worked in the legal field since 1977, and has worked for the law firm of Morrison & Foerster LLP since 2002, where she is currently a Senior Docket Coordinator. Mary is a former member and Past President of San Francisco Legal Professionals Association.

Sacramento Legal Secretaries Association did a fabulous job of hosting LSI's August 2014 Quarterly Conference at the Embassy Suites in Sacramento with the theme, "Laissez Les Bons Temps Rouler!" There were certainly lots of good times, and a lot of work was also accomplished at this conference.

The Board of Governors meeting began with having the opportunity to hear our welcome speaker, B.J. Susich, Attorney at Law, and President of the Sacramento County Bar Association. Mr. Susich spoke on the terrific relationship that the county bar has with Sacramento LSA. I realize that many associations do not have such a partnership with their local county bar association; however, it reminds me that we should never give up trying to develop such a relationship. Remember that bar presidents change every year, so if you keep reaching out one day you may receive a "yes" instead of a "no."

I'm excited to share the news that at this quarterly conference, our Social Media Chair Rod Cardinale, Jr. was given the green light to set-up LSI's first official Facebook page. Please follow this link to our page and "like" it: <https://www.facebook.com/LSI1934>. LSI needs to keep moving forward in being part of the era of social media, and Facebook provides an excellent opportunity for LSI to get the word out that we exist.

The Board of Governors approved the adoption of amending Standing Rule 5.1 by striking the word "shall" and replacing it with "may" immediately after "LSI" and insert "If a contest is held," before the start of the second sentence. The Standing rule 5.1 now reads:

LSI may conduct a Local Association History Book Contest at each Annual Conference, the rules of which shall be established by the LSI Historian and approved by the Executive Committee. If a contest is held, the total cost of each Local Association's History Book entered in the History Book Contest shall not exceed \$300. Monetary prizes of \$50 shall be awarded in each class of membership.

Amending this Standing Rule gives the LSI Historian the choice to hold a History Book contest or not at the Annual Conference. If you looked at the past several years, you will see the number of entries of history books by the Historian of the local associations has declined, which is due to the local President not being able to fill this chairmanship. These days it is becoming harder to find members to be officers, let alone being chairmen, and this is a way of allowing the local President not to feel obligated to appoint a historian.

Between the six seminars presented over the weekend by the Legal Specialization Sections, the CEC seminar presented Friday night, and the CCLS Workshop presented on Saturday morning, attendees had ample opportunity to obtain continuing education. The main reason for LSI's existence is to provide continuing education to our members and non-members.

The first Presidents' luncheon of the new fiscal year started with everyone in attendance agreeing to have a Presidents' blog set-up on LinkedIn. Between conferences, this will provide the Presidents with an opportunity to share

ideas, ask questions of each other, and provide support to one another. I'll be part of the group as well with my role being the moderator. At the time that I'm writing this article, all of the local Presidents have received an invitation to join the group, and I encourage you do so.

Deena Fawcett, Clerk of the Third District Court of Appeal was the Sunday morning speaker. I found Deena to be inspiring and funny. She shared with us that she started out as a legal secretary and was encouraged by one of her bosses to go back to school, which she did, and eventually she went to work at the Third District Court of Appeal. She spoke on "Tips for Finding Life and Work Balance." I could see that many of us in the room agreed with some of her suggestions such as: Take care of you and your health; Reduce toxic people in your life; Spend some time alone; and Have fun! In today's world of instant communication it is so easy to keep reaching for my phone every time that it dings to read the latest e-mail. She reminded me that I need to balance my time better in order to take care of myself, and to be able to serve LSI to the best of my ability.

In continuing with the Local Association Promotion Program, on Sunday morning the following five associations were selected to receive a free scrip ticket for the November 2014 Quarterly Conference: Beverly Hills/Century City LSA; Conjeo Valley LPA; Orange County LSA; San Diego LSA; and Santa Barbara LPA. I will be following up with the winning associations to find out if this is making a difference in having members attend conferences.

There were several first time attendees at the August 2014 Quarterly Conference, which made me realize that many of us take for granted what happens at the Board of Governors meeting, but for a newbie it can be an overwhelming experience. The main focus of the Board of Governors meeting is to conduct the business of the corporation – Legal Secretaries, Incorporated. We are a non-profit mutual benefit corporation, and must comply with the laws to maintain such a corporation. In order to comply with California laws, we must conduct the business of the corporation and keep proper records. The status of the corporation's financials and any action taken must be addressed and brought before the Board of Governors to ensure the Executive Committee is overseeing the finances and programs of LSI responsibly.

The Executive Committee has the power to act on behalf of the Corporation at the direction of the Board of Governors. The responsibilities of the Executive



Committee are set out in our Bylaws, specifically, Article VIII, Sections 1-6, and the specific powers of the Executive Committee are set out in Article XI of the Bylaws. As a member of LSI, it is important to become familiar with the Bylaws and Standing Rules of LSI, so as to understand how and why the corporation operates the way it does.

This is why many times you may hear one of the members of the Executive Committee telling the Board of Governors that if you are not happy with how the corporation is being run and/or, you have a suggestion to make the corporation run better then it is up to you to say something. The Executive Committee merely follows through with the decisions made by the governors, and issues that are developed and discussed at the Board of Governors meeting. The Governors are the only ones with voting rights at the quarterly conferences, and delegates have voting rights during the general sessions at the annual conference. However, any member may ask questions at the business meeting, express their opinion, make a motion, second a motion, or amend a motion.

Make a change in your life, step outside of your comfort zone. Bring someone new in to LSI. Take it a step further and invite someone new to attend an LSI conference with you. Introduce them to the Executive Committee and the members of LSI. Help them experience all that LSI offers. But most importantly, make them feel welcome. Make them realize the advantages of being a member of Legal Secretaries, Incorporated.

LS



AUGUST 2014 | SACRAMENTO

LSI First Quarterly Conference







KATHLEEN GORMAN is a Southern California native and Palm Springs resident since 1990, and has served in the legal profession for 27 years. Kathleen is a past member of the San Fernando Valley Legal Secretaries Association and current member of the Desert Palm Legal Professionals Association. Kathleen is a certified paralegal with the law firm of Slovak Baron Empey Murphy & Pinkney LLP in Palm Springs.



ERIKA GARDUNO initiated her experience in Los Angeles County 20 years ago and transferred to the Coachella Valley in 2007. Erika's knowledge/experience varies from personal injury, manufacturing defects, governmental agencies, and Tribal defense, among others. Since her arrival to the Coachella Valley, she has been employed with the law firm of Slovak Baron Empey Murphy & Pinkney LLP in Palm Springs. In addition, she currently volunteers her time as a secretary for the Palm Springs Middle School Choir Booster.

Desert Palm LPA Gets Ready to Welcome Attendees to the 2014 LSI Second Quarterly Conference in Palm Springs

BY ERIKA GARDUNO & KATHLEEN GORHAM, 2014 LSI 2ND QUARTERLY CONFERENCE CHAIRS

Desert Palm LPA is honored to host LSI's 2nd Quarterly Conference November 7, 8 and 9, 2014 at the newly renovated Hilton Hotel in Palm Springs. Conference Chairs, Erika Garduno and Kathleen Gorham, and DPLPA are hard at work creating a wonderful weekend for all.

Erika and Kathleen have endeavored to make this a conference by all for all. Beginning with the theme for this event, DPLPA members were asked to present their theme ideas and, by unanimous vote of all attending DPLPA members, the Masquerade Ball theme was born.

Although a conference chair is chosen (albeit, by volunteers) and a committee formed, the ideas, assistance and hard work from our members as a whole has served to bring us closer as an association. So many ideas have been brought to light by our members, some of which we cannot fit into the three-day conference, will be events to hold throughout the coming year and beyond!

The "mask" is a predominant part of masquerade which will be provided to attendees at the Saturday Night Banquet a.k.a. Masquerade Ball, a black and gold themed evening with masks should anyone choose to don one.

In addition to the conference seminars, welcome reception, luncheons, etc. we will have exhibitors, vendors, gift prizes and raffles. The Hilton, as some of you may recall from our conference two years ago, has been fully renovated inside and out, and includes a new gym and spa



for all guests. In the center of the downtown area, you can walk one block to shops, restaurants, salons, and the casino. A frequently asked question we are encountering is whether attendees can bring along their spouses, families or friends. The answer is "absolutely!" One last tidbit we recently learned is that the Hilton is a pet friendly hotel (up to 70 lbs. w/a \$75 deposit).

We look forward to seeing you in November!

LS

DON LEE has been a member of LSI since the early 70s when his association was then called Merced-Mariposa Counties Legal Secretaries Assn. He was also president of Merced-Mariposa LSA in the 70s when it dissolved shortly thereafter. He then became a member of Merced County LPA when it was reorganized in the early 80s and was made an Honorary Member thereafter. LSI made him an Honorary Member for his outstanding contributions on November 12, 2011



Celebrating the Election of Mary J. Beaudrow, CCLS

BY DON LEE, LSI HONORARY MEMBER, MERCED COUNTY LPA

At the conclusion of LSI's 80th Annual Conference in Concord, there appeared on the brunch tables an announcement inviting everyone to come "Celebrate the Election of Mary J. Beaudrow, CCLS," in Pleasant Valley on June 28, 2014. The announcement had a musical tone to it.



Merced County LPA President Lorraine Bettencourt and Governor Stephanie Harrison and I welcomed their invitation and journeyed up to Pleasant Hill for the celebration at Zio Fraedo's.

We were the last to arrive as we got stuck in traffic for a good half hour to travel ten miles. LSI members from San Diego, Stockton, Concord, San Francisco, Santa Clara, Sacramento and other bay area cities were already there when we arrived and they all greeted us like we were the guests of honor, which, of course, we were not, it was Mary's day. They heard we were coming and awaited our arrival.

Zio Fradedo's is an Italian restaurant with a charming Tuscan-trellis style patio as you entered that bespoke of its charm, and the food deserved five stars. The length of its main hall, both sides, had built-in glass cabinetry with porcelain statuettes celebrating Disney's creative genius.

The Mistresses of Ceremony were none other than the dynamic duo of Christa Davis and Yvonne Waldron-Robinson who kept the festivities alive and mirthful in their inimitable style.

There were musical composition sheets on the table as decorations which led to the little known fact that Mary J. Beaudrow is an accomplished cellist, and her mother is an accomplished pianist. Now if we can only get YO YO MA to appear at our next annual conference and play a duet with Mary on the cello.

Mary was presented with gifts which included musical-note earrings, a grand piano music box and a picture of her favorite actress, Marilyn Monroe. Everyone left on a musical note, yes, you guessed it, "singing praises" to Mary J. Beaudrow, President, LSI.

LS

Who are the CCLS Chair and Certifying Board?

For those of you who wonder who the LSI CCLS Chair and the Members of the CCLS Certifying Board are, and what makes them qualified for their positions, we thought an introduction was in order. Below are the stories of the various individuals involved with the CCLS program.

TERRIE QUINTON, CCLS - LSI CCLS Chair



I became a CCLS in 1997, after having lost all of my confidence in myself and my ability to do my job because of the attitude of the attorney I worked for toward me. I went to a brown bag luncheon being held by San Diego LSA, and walked away thinking that I was going to take the exam, and if I didn't do well on it, I would change careers. I joined our local study group, went through all the materials (I read the LOPM at least 3 times, and the Gregg Reference Manual at least 4 times), traveled to Los Angeles to take the exam (the hotel rooms were so expensive in Century City that we had 6 of us staying in one room!), and passed it on the first try. For me, that was validation that I was capable of doing my job, and six months after I got the exam results, I changed jobs and have been with my new attorney ever since.

I was first appointed to the CCLS Certifying Board by LSI Past President Kay Thornburg, and spent four years as a Member, including serving as Chair and Recertification Chair. Afterward, I spent several years teaching SDLSA's local study group, with great success. I began receiving requests from others throughout the state who wanted to join, and so I began conducting classes with students joining via Skype or WebEx. LSI Past President Sandra Jimenez asked me if I would be the CCLS Chair during her term and help get LSI's On-Line Study Group off the ground. I of course answered YES! I got a chance to get a little bit of an early start when my predecessor had to step down from the position because of family matters, and am now in my fourth year as LSI's CCLS Chair, and we have now completed our third session of the On-Line Study Group, again with great success.

ELISE DRESSER, CCLS (CCLS Certifying Board Chair)



I became a CCLS in 2009. Turn back the clock to 2008: My firm had just gone through a downsizing and practically overnight we went from 14 attorneys and 4 secretaries to 5 attorneys and me! How was I going to survive by myself in a busy civil litigation firm? When the last secretary walked out the door, she gave me a hug, wished me luck, and suggested that I look into joining a local legal group called Santa Clara County Legal Secretaries Association. After struggling by myself for a few months, I finally sent in my membership application and was immediately contacted by Santa Clara LSA's Past President Marilyn Ott, CPS, who asked me to fill a vacated position on the board. Being someone who has a difficult time saying "no" to anything, I suddenly found myself taking minutes at board meetings and learning all about what LSI had to offer. It was like a whole new world had opened up for me! Shortly afterward, we were notified that LSI's CCLS Chair at the time, Astrid Watterson, CCLS, was planning to offer a statewide study program in preparation for the next CCLS exam. I thought to myself that the study program would be a great reference tool since I was now the only secretary in my office. Little did I know how much more it offered, and signing up for the study program really changed my life! I put my nose to the grindstone and studied very hard in the months leading up to the exam. Flash cards became my best friend! I passed the exam on my first try, and the entire experience provided me with more confidence in my daily work life than I could have ever imagined.

I was appointed to the Certifying Board in 2011 by LSI Past President Brooke Mansfield. I served the last two years as Recertification Chair, and am honored to serve this year as Certifying Board Chair with an amazing group of Certifying Board members.

HOLLY WONG, CCLS **(Recertification Chair)**



I became a CCLS in March 2011. After hearing inspirational stories of becoming a CCLS, I decided to take the challenge and signed up for a study course conducted by Laurelyn Bergfeld, CCLS, of San Fernando Valley LSA. As a career legal secretary with 20 years of experience in many areas of the law, I figured the exam would be a piece of cake. Let me just say that I quickly found out how little I really knew, and I had a lot to learn if I wanted to pass the exam. In the days leading up to the exam, I studied right after work and deep into the night. My kids loved me for all of the fast food dinners I was feeding them! Exam day came quickly, and I went into the exam knowing that I would do my best, but if I did not pass, at least I would be able to know the areas where I would need to do more studying and sign up for the next exam. I ended up passing the exam! The CCLS certification has certainly boosted my confidence, and was worth every bit of stress that I endured leading up to the exam. My bosses are highly impressed, and I never fail to remind them of this certification at every annual review!

LEQUITA HODGE, CCLS **(CCLS Certifying Board Vice-Chair)**



My travels on the road to CCLS began I believe in 2000. I had a small child and six others which made for a very lively household. I participated in a study group, studied on my own and failed. I was literally a few percentages away from passing four sections and breezing to a three sections retake. Well as you can probably guess I decided a husband, seven children and a full time job just wasn't conducive to passing this test so I put it on hold. Little did I know for how long. It eventually came up again when the statewide study group came along. I thought okay. Let's try this again. My husband was my biggest supporter and my children were all older and got on the bandwagon as well. I got all of my study material, had flash cards. Everything I needed to start. I went to the first class and BOOM. The next Saturday my godfather passed. Five days later my godmother passed. Seven days later my mother passed. I had to travel up and down the state of California to take care of financial matters, etc. so my studying didn't go very well. I tried to make it to every

group meeting I could but other than flashcards with my husband at night, he wouldn't let me get off the hook with that at least, studying was at a minimal. I failed every test I was given. Did poorly on quizzes. I have to admit I truly wanted to give up but he wouldn't let me. I was told maybe I should wait and take it the next time because of missing classes and not doing well on my tests but my attitude became "what have I got to lose." So I stepped out on faith and took it. Low and behold on the morning of April 23, 2009, I received my email that I had passed. It was a wonderful feeling and now as I look back I'm so glad I listened to my husband. I lost him four months later but every time I look at my CCLS I can think about the journey and how he helped me reach my CCLS goal.

SHARA J. BAJURIN, CCLS **(CCLS Certifying Board Secretary)**



I became a CCLS in 2008. Mary L. King, CCLS, a long-time member of San Mateo County LSA, had strongly encouraged me over the years to take the exam. I finally ran out of excuses not to take it. I studied on my own beginning in April 2008 for the October exam, and focused on studying the listed reference materials, plus every single mock exam available. Each night I read and took notes while watching game shows on TV. Using the notes, I created flash cards, which I kept in my purse. On the day of the exam, I woke up sick with a terrible cold. It was such a nice surprise when I arrived at the exam location to see that my former co-worker and friend, Joan Layte, CCLS, was proctoring the exam. There were only four or five of us taking the test that morning, so it was a little less embarrassing to have a Kleenex box sitting next to me. Once I finished all the sections of the exam, I drove home, took cold medicine, and crawled to bed, sure there was no way I had passed. However, lo and behold, I did pass, and was thrilled to receive the news from Joan. Turns out, for me, spending time over many months to learn the material was the way to go. Mary King passed away in 2012, but my fondest memory of her is not her presence at my wedding, or the many times we worked together for our association, but the day she attended the CCLS luncheon with me. I don't remember what I said, but I do know it started out, "Thanks to Mary L. King, CCLS," and ended with both of us in tears.

Continued on page 10

CINDY FRAZIER, CCLS **(CCLS Certifying Board Bookkeeper)**



I became a CCLS on 10/18/03. I took the exam three times. The first time I spent the day prior to the exam studying in a hospital in Bakersfield waiting for my sister to come out of surgery for cancer. Her surgery went long, but she was finally ok for me to leave, so I drove back to Ventura late that Friday night, outrunning a snow storm that closed the

Grapevine, arrived home around 1 a.m., was up at 5 a.m. to meet my group (there were 4 of us taking it) and drive to Northridge to take the test. During this exam there was a

minor earthquake – shook us all awake. I passed 5 sections. The second time I took the test I drove out to Riverside from Ventura, with my Mom along for support, in a torrential downpour, hydroplaning a lot getting to and from. I passed the grammar section. The last time I took the bookkeeping section (my nemesis), it was without any drama and I finally passed. I should end my story with, as this is one of my favorite statements to make when I tell this story to those striving to pass, “my CCLS designation does not say ‘after three tries’ - it merely says CCLS!”

LS



LEGAL SECRETARIES, INCORPORATED CALIFORNIA CERTIFIED LEGAL SECRETARY WORKSHOP REGISTRATION FORM

“Legal Computations– Calendaring”

Second Quarterly Conference

Palm Springs Hilton, Palm Springs, CA

Saturday, November 8, 2014, 7:30-8:30 a.m.

Cost: \$5.00 for LSI members/\$10.00 for non-LSI members

Oh no! My document is due on a holiday – do I roll the due date back to the previous business day or forward to the next business day? How many extra days do you get to respond to discovery that was served via overnight mail? If these are some of the things that are intimidating you as you study for the CCLS exam, come to this workshop and get the answers to your questions.

REGISTRATION DEADLINE: November 4, 2014

Name: _____ Email: _____

Address/City/State: _____

Phone (Work): _____ Local Assn.: _____ LPA/LSA

Please make check payable to LSI. Mail registration to Terrie Quinton, CCLS, c/o Duckor Spradling Metzger & Wynne, 3043 4th Ave., San Diego, CA 92103, and email registration to quinton@dsmw.com.

CCLS CREDIT WILL BE GIVEN FOR THIS WORKSHOP

TERRIE QUINTON, CCLS has been a legal secretary since 1985, and is a member of San Diego LSA. Terrie obtained her CCLS in 1997, and has since served four years on the CCLS Certifying Board. In addition, Terrie is currently LSI's California Certified Legal Secretary Chair.



ELISE DRESSER, CCLS, earned her CCLS in 2009 and is currently serving as the CCLS Certifying Board Chair for LSI. Elise is also serving as Executive Secretary on the board of Santa Clara County LPA and is also a board member of the Bay Area Legal Forum (BALF). Elise has been a civil litigation secretary at Newton Remmel in Mountain View for over 25 years and can be reached at edresser@newtonremmel.com.



A CCLS Grab Bag of Information

BY TERRI QUINTON, CCLS AND ELISE DRESSER, CCLS
LSI CCLS CHAIR, CCLS CERTIFYING BOARD CHAIR

Below are some tidbits of information about the California Certified Legal Secretary program that may help you understand the program and study for the exam.

CCLSs BY THE NUMBERS

There are 272 California Certified Legal Secretaries at this time (hopefully with even more being added to the list following the October CCLS exam.)

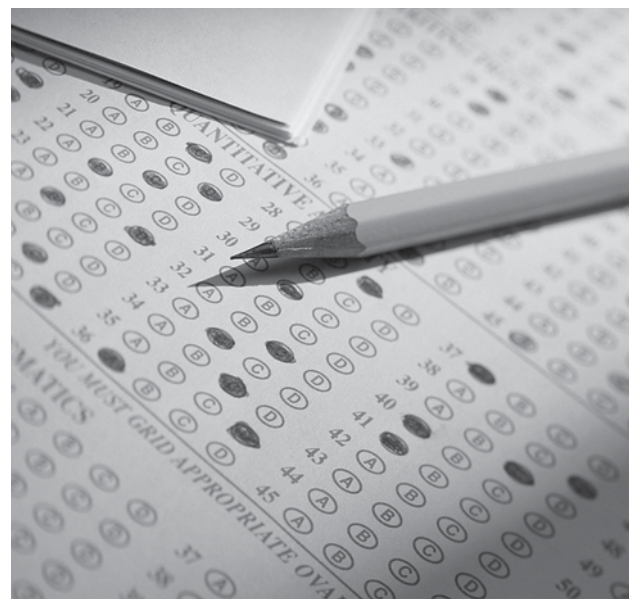
Of those CCLSs, 17 grandfathered in when the program began. These individuals were already PLSs, and did not have to sit for the CCLS exam. There are also 8 attorneys.

There are 104 who are retired, 2 who have switched fields, and 11 who have moved out of state. These individuals' educational credit requirements are stayed, but if they return to the active legal field in California, they will have to once again start acquiring educational credits.

WHY DOES IT TAKE SO LONG TO GET THE RESULTS?

Many wonder why it takes so long to get the results of the CCLS exam since all answers are recorded on a scantron. Here's the low-down:

After the exam, all scantrons are sent to the CCLS Certifying Board Chair, who in turn sends them to a former Certifying Board Member who runs the scantrons. Once the Chair gets them back, spreadsheets are prepared of every question and every examinee, which are sent out to the Board Members. Each question that has more than half the examinees getting it wrong is reviewed in depth by the Members to determine if there is a problem with the ques-



tion, answer key, etc. Once they have done so, a marathon conference call takes place where the results of the exam and the review are discussed. After the call, the Chair updates the spreadsheets and sends them to the Members once again for review. Finally, once all of this has taken place, the Chair sends out the results to the examinees.

HOW CAN I FIT STUDY TIME INTO MY BUSY SCHEDULE?

It does take a lot of studying to get ready for the CCLS exam and get through it. But there are many moments in time that can be used.

Make flash cards – keep small stacks of flash cards in your purse or pocket, and pull them out when you're standing in line at the grocery store, pumping gas, waiting at Starbucks for your morning latte.

Continued on page 13



ROBERT B. JACOBS practices Real Estate, Business Law, and Construction in the Bay Area. Mr. Jacobs can be contacted at Bob7@RBJLaw.com. This article is not a complete discussion of the subject addressed, and should not be relied on. Readers with specific questions or issues should consult an attorney.

Property Taxes Increased Five Times

BY ROBERT JACOBS, LIVERMORE AMADOR VALLEY LPA

Robert B. Jacobs practices Real Estate, Business Law, and Construction in the Bay Area. Mr. Jacobs can be contacted at Bob7@RBJLaw.com. This article is not a complete discussion of the subject addressed, and should not be relied on. Readers with specific questions or issues should consult an attorney.

Alright - hold on to your hat. Proposition 13 taxes can be a bit complex. But California homeowners must pay them. So Proposition 13 taxes are something that affect a lot of people living in California.

Taxes? They are a part of life. Benjamin Franklin said "Our new Constitution is now established, and has an appearance that promises permanency; but in this world nothing can be said to be certain, except death and taxes." (As quoted in Bartlett's Familiar Quotations.)

So what is Proposition 13, and why does it make a difference? Proposition 13, adopted by California voters in 1979, provided a formula for calculating real estate taxes. Nearly every owner of residential or commercial real estate pays annual taxes for the privilege of owning their real estate. Proposition 13 was drafted to amend the California constitution - so it's clear that in 1979, the voters meant business. The Proposition 13 law adopted by the voters is found in Article XIII A of the California constitution.

Under Proposition 13, California property owners pay annual property taxes of no more than 1% of the "full cash value" of their property. "Full cash value" means the value of the property on the date it was "purchased, newly constructed, or when there is a change in ownership."

Why does this make a difference? Because you can own a property for many years. If property values appreciate a lot, your Proposition 13 California property value may only move up slightly. That's because Proposition 13 was designed to benefit owners who don't change properties frequently. In other words, owners who got in early (or who got in cheaply) may have a lower tax basis than more recent owners of similar properties.

The Proposition 13 idea makes sense (after a fashion). If you have a fixed income, and you stay in your house, then your property taxes may increase only a small percentage of what they would otherwise if you had to pay full taxes on the true value of your property each year. Proposition 13 can help seniors and those who stay put for long periods of time. The people it potentially hurts are those who are newly buying property. In addition, the overall California population may suffer if too many homeowners stay put and don't sell their homes or transfer ownership.

Property taxes can be tricky. Real Property taxes can be directly affected by the way title is held. In a legal case decided in 2013, a son inherited a property from his mother. He then deeded the property to himself and his brother "as joint tenants." Proposition 13 says that property taxes are based on the value of property when title is transferred. But Proposition 13 also says that if an owner creates a "joint tenancy" with another person, then the property value remains unchanged for tax purposes. So in this case, the brother who inherited the property gave part of it to his brother. So far, so good. By creating a "joint tenancy" there was no "transfer of ownership" and so the old property value remained intact.

But after the second brother went on title, the second brother recorded a deed to himself. This deed recording did two things. First, it "severed" the joint tenancy. In a joint tenancy, when one owner dies, the remaining owner automatically owns the entire property. (It gets a bit more complicated when there are more than two joint tenants). So by recording a deed to himself, the second brother severed, or canceled, the joint tenancy. That meant that each brother owned his own share, and only his own share,

PROPERTY TAXES INCREASED FIVE TIMES

regardless of his own death or the death of the other, and the death of either of the brothers wouldn't affect the brothers' ownership interests in the property. However, under Proposition 13, the recording of this deed by the second brother amounted to a "transfer" of a property interest - and this "transfer" triggered a "reappraisal" of the property.

Why did this make a difference? Because the original value of the property had been established at \$100,631, and the brothers were paying annual property taxes on that value. But when this new deed was recorded, the property was "reappraised" at its current value of \$525,323 - which was more than five times the previous value. This meant that the brothers had to pay five times the amount of property taxes that they paid before this second deed was recorded.

The second brother may not have ever expected that his severing the joint tenancy would result in a big tax increase - but it did.

So what's the bottom line? Property owners must be very, very careful in real property title matters. Even small changes to title can have expensive, unintended consequences. The best approach? Property owners act wisely when they consult legal counsel in connection with changes to property titles.

LS

A CCLS GRAB BAG OF INFORMATION

Continued from page 11

Use your everyday work product - if your attorney uses the *Blue Book* for citations, print an extra copy of your pleadings and then translate the citations into *California Style Manual* format; if you lose the punctuation battle with your attorney, print out an extra copy and re-punctuate it according to Gregg.

Get your children in the mix - children love playing teacher to their parents. Let your children quiz you using your flash cards, or using the Glossary from the *Law Office Procedures Manual*. It's great practice, and it also gives you some additional family time during your studies.

Study during lunch - studying during your lunch hour is a great use of time, especially if you work with or near someone else studying for the exam. Even if you are alone in your pursuit, ask your co-workers to help quiz you.

HOW SHOULD I STUDY?

Know your study style! Some learn by listening, some by writing notes, and others by teaching. We are all different in the way we learn, and knowing your own style will help you avoid wasted time and frustration.

Use free online study tools. There are simple study tools available online, such as Quizlet at <http://quizlet.com/> which provides free study tools like flashcards, tests, and study games to make learning fun. Also, Quizlet is accessible on your home computer or on the go using your iPhone, iPad, and Android. There are many compatible mobile apps, such as Flashcards+.

Use the Internet. Download copies of study materials available free online, such as the *California Style Manual* and the *California Notary Public Handbook*. For some of us, having

an electronic version really helps. (Make sure you also have a hard copy of the *California Style Manual* so you can carry it with you and mark it up as you study.) Go to YouTube and watch videos about grammar, such as the grammar lessons on YouTube hosted by author John Green and his "38 Common Spelling and Grammar Errors" at <https://www.youtube.com/watch?v=hRMRCeQBAKI>. Gets a laugh every single time!

Find a study buddy. Meet on a regular basis to review material, go through flash cards, and quiz each other. You will each have different strengths that you can bring to the table. And you can always have more than one!

Make use of your lifelines. If you are in a live study group, ask for help from your study group leader; if you have a particular area of expertise, offer your assistance to teach a section of the material. You can also always contact the LSI CCLS Chair, Terrie Quinton, CCLS, at lsiccls@outlook.com if you have questions or need assistance.

Join a study group. While it is possible to study on your own and pass the CCLS exam, it helps to belong to a study group, either local or LSI's on-line group. Tips and tricks are passed along, material is explained, and you have access to study buddies.

THE EXAM

Each of the seven sections of the exam is updated each time the exam is given because court rules and code sections change. The material covered in the exam is based off the most recent updates to the *Law Office Procedures Manual* as of January and August of each year, when the exam has to be completed in preparation for the exam date.

LS



JENNIFER K. HILL has spent the past eleven years as a professional recruiter and career coach, where she was a top-performing senior recruiter with a premier corporate and legal recruiting firm in Los Angeles before opening her own staffing firm, JHill's Staffing Services, Inc., in 2010. She has recruited for top tier law firms and corporations throughout the United States. Since 2008, Jennifer has been interviewed on both American radio stations and the BBC, as well as appearing on FOX, NBC, ABC and various other television shows as an expert in the field of recruiting and job hunting. Jennifer takes the time necessary to understand the needs of the job seekers and hiring managers she works with to ensure that a symbiotic match is created. Jennifer educates both job seekers and hiring managers about the benefits of using technology and social media in recruiting and job hunting.

The Changing Role of the Legal Secretary

BY JENNIFER HILL, LONG BEACH LPA

In the past five years or so we have begun to see a significant change in the role of the legal secretary who works in a law firm. In the past, legal secretaries were often the right hand to perhaps one, maybe two and rarely three attorneys. They dealt with clients, they answered phones and handled transcription among other things. As technology has developed and more tech savvy attorneys are coming into law firms, secretaries are relied on less and less for traditional secretary duties, and the role of the legal secretary is shifting day by day. Some secretaries are now required to support five or even ten attorneys at once. Other secretaries are required to work in pools and may not have any direct assigned attorneys. Additionally, more and more secretaries are required to be cross-trained in different practice areas to increase versatility. Finally, many legal secretaries are required to have stronger technical skills than ever before to keep up with all of the new changes.



So what does this mean if you have been a secretary for the past 10, 20, or 30+ years and you want to continue to be a legal secretary? It means that it is time for the "Adaptability Factor." What do I mean by the "Adaptability Factor"? It is a term I coined in my recent book, "Stop Hoping...Start Hunting! A Job Seeker's Guide to Finding a Dream Job." What I mean by the "Adaptability Factor" is that how quickly you can adapt to new circumstances, changes and technologies is going to directly correlate to how employable you are in the future.

I was leading a class last year at the Microsoft Store about Interviewing 101 when a seasoned legal secretary who I knew and had worked with came up to me to ask me a question. She asked, "Jennifer, does ageism exist and am I still employable?" I quickly responded that YES, ageism does exist, (but not to the extent that people imagine) and that YES, she was definitely still employable. To prove my point, I then went to pull up a spreadsheet with all of our placements on it to showcase the more experienced

folks who we had recently employed, but then I noticed something. Of the more experienced workers who we had placed (in other words they were hired, which disproves ageism), close to 30% of those workers had been terminated within a relatively short period after having been hired.

This caused me to pause. What did this mean? I then went back over my notes on some of the more experienced workers who we had placed in a variety of positions and looked at why they did or did not work out in their respective positions. What I ascertained was very interesting. These more experienced workers were definitely employable (as evidenced by their being hired), however once they were employed they were unable and/or unwilling to adapt to the changes in the workplace. That is how I came up with the idea of the "Adaptability Factor."

It is your attitude multiplied by your skills that equals your employability.

Continued on page 33



The Continuing Education Council

PROUDLY PRESENTS

INDIAN REAL PROPERTY LEASES AND SALES ON THE AGUA CALIENTE INDIAN RESERVATION

HISTORY OF INDIAN REAL PROPERTY DEVELOPMENT, ROLE OF BUREAU OF INDIAN AFFAIRS
AND CURRENT ISSUES



CHRISTOFFER THOMSEN, ESQ.

Partner at Schlecht, Shevlin & Shoenberg, A Law Corporation

FRIDAY, NOVEMBER 7, 2014*

5:15 p.m. to 6:15 p.m.

Hilton Palm Springs, 400 East Tahquitz Canyon Way, Palm Springs, CA

Email reservations to: J. Cori Mandy, CCLS
jcmandy5@gmail.com
619-515-3256 or 619-954-3603

*Seminar is free with a paid conference registration

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 1.0 hours.



LEGAL SECRETARIES, INCORPORATED

CCLS ON-LINE STUDY GROUP

January 13, 2015 – March 17, 2015



If you are interested in studying for the California Certified Legal Secretary (“CCLS”) Exam,** join LSI’s CCLS On-Line Study Group. During the classes, all topics covered in the CCLS exam will be reviewed, including:

- California Legal Procedure (civil, family, probate, real estate, corporate)
- Legal Terminology (citations, terminology)
- Legal Computations (calendaring, math)
- Skills (proofreading, following directions)
- Ability to Communicate Effectively (grammar, punctuation, word usage)
- Law Office Administration (computers, filing)
- Reasoning & Ethics (ability to act reasonably and ethically)

CLASSES BEGIN TUESDAY, JANUARY 13, 2015

Classes will take place once a week via WebEx videoconference on Tuesday evenings from 7 p.m. to approximately 8:30 p.m., and will continue through March 17, 2015. Login information will be provided upon enrollment in the classes. System requirements are available at www.webex.com.

The cost of the Study Group (all classes) is \$100 for LSI members and \$125 for non-LSI members taking classes for first time; and \$50 for LSI members and \$75 for non-LSI members repeating. Each individual must register separately.

NEXT CCLS EXAM SATURDAY, MARCH 21, 2015

Students will be provided with homework and handouts. **Students are responsible for providing their own *Law Office Procedures Manual*, *The Gregg Reference Manual* (11th Ed.), *California Style Manual* (4th Ed.), and *Pocket Guide to Legal Ethics*, by the start of the classes.** Students are also encouraged to have the CCLS Study Guide.

***All examinees must meet eligibility guidelines outlined in the CCLS Information Kit on LSI’s website.*

CCLS STUDY GROUP REGISTRATION

(Please type or print clearly)

Name: _____ Association: _____ LSA/LPA

Address: _____

Daytime Phone: _____ Evening Phone (during class time): _____

Email (during class time): _____

Payment: Check # _____ Credit Card # _____ (Visa/MC only)

Exp. Date: _____ Sec. Code: _____

Send registration form by NO LATER THAN December 31, 2014, to Terrie Quinton, CCLS, LSI CCLS Chair, c/o Duckor Spradling Metzger & Wynne, 3043 4th Avenue, San Diego, CA 92103, email lsiccls@outlook.com. You may also pay via PayPal at www.lsi.org. **NO REFUNDS AFTER JANUARY 6, 2015.**

STRIVE FOR SUCCESS – BE A CCLS!



BEGINNING LEGAL SECRETARIAL TRAINING CLASS

LSI will be offering its Beginning Legal Secretarial Training Class online. This class will be an eight-week, work-at-your-own-pace online session commencing January 12 and ending March 9, 2015. During the classes, the following topics will be covered:

Introduction to the Law Office
Duties of the Legal Secretary
Effective Telephone Skills
Effective Oral Communication Skills
Effective Written Communication Skills
Calendaring and Timetables
Basic Grammar Skills

Transcription and Proofreading Techniques
Court Structure
Citations
Service of Legal Documents
Preparing a Proper Caption
Preparation of Documents Filed with the Court
Basics of Civil Litigation

CLASS SESSION OPENS ON MONDAY, JANUARY 12, 2015

Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the class.

The cost of the training class, which includes the Legal Secretary's Reference Guide, is \$150 for LSI members/\$200 for non-LSI members. Each individual must register separately. Upon completion of the class, students will receive a certificate from LSI.

BEGINNING LEGAL SECRETARIAL TRAINING CLASS REGISTRATION

(Please type or print clearly)

Name: _____ Email: _____

Address/City/Zip: _____

Telephone: _____ Association: _____ LSA/LPA

\$150 LSI Member _____ \$200 Non-LSI Member _____

Payment: Check # _____ (made payable to LSI)
(Note: Checks must clear before books will be mailed and may cause a delay in access to the class.)

Visa/MC Credit Card # _____

Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

Email registration form NO LATER THAN January 5, 2015, to Shaylene Cortez, CCLS, LSI Legal Secretarial Training/Seminar Chair, training@lsi.org or mail to: LSI, P. O. Box 660, Fortuna, CA 95540-0660. Registration will also be offered online at www.lsi.org with PayPal. Keep in mind books will not be mailed until registration is processed. For further information or inquiries, email training@lsi.org. No refunds after January 12, 2015.

LSI – Educating California's Legal Professionals



ANA FATIMA COSTA began her career as a freelance court and deposition reporter in 1979. Then, she managed the San Francisco office of a large national court reporting firm. Last August, she left a ten-year successful sales and litigation support practice at a national court reporting firm to devote her time to her own firm, AFC Consulting. Ana now offers workshops for legal professionals on a variety of topics; legal blogs and other writings; and heart-centered coaching. She is a Certified Coach and Mediator, a member of Mt. Diablo Legal Professionals Association, and a board member of San Francisco State University's Paralegal Studies Program. Ana can be reached at ana@anafatimacosta.com.

WANTED: Court and Deposition Reporters

BY ANA FATIMA COSTA, CSR, RPR (RET.), MT. DIABLO LPA

California facing a shortage of 2320 reporters by 2018

On a recent Friday morning, one of my clients emailed me at 8:30 in the morning, desperately needing a court reporter for a hearing in San Francisco Superior Court at 9:30 that could last from 10 minutes to an hour. My agency's calendar staff called all of our reporters who were not working, as well as competing agencies. Knowing the current landscape of the court system, Bill wandered the halls, trying to find a reporter who, with machine in hand, just may be available to jump in to help. After 30 minutes, he did not see a single reporter, and 50 minutes later, I had to give him the bad news: We were unsuccessful as well. No one was available to get there in time.

HOW DID WE GET HERE?

(1) Budget cuts, and (2) lack of knowledge about the field of court reporting.

BUDGET CUTS

The economy tanked in 2008. Insurance companies heavily influence the freelance court reporting industry. When the economy declines, insurance companies spend less on defending claims by settling cases out of court, - i.e., medical malpractice, personal injury, or property damage - thus decreasing the amount of work for freelance court reporters.¹

Since 2011, as if a huge virtual brush fire swept through California, many of the 58 counties holding a state court laid off hundreds of employees, and the state court system was thrown into chaos. The remaining clerks are overwhelmed; there are shorter hours for filing paperwork; courthouses have closed and/or merged departments with other courthouses; and attorneys and their staff are scrambling to find qualified reporters who understand the needs

of reporting in court. Everyone has been impacted – attorneys and their staff, commissioners, judges, clerks, reporters and reporting agencies.

LITTLE-KNOWN PROFESSION

Administrators in court reporting programs face a continuing challenge: Finding qualified students who are committed to staying in school and graduating. Why?

- Reporting is a relatively unknown profession (how many do you see on TV?)
- Preference / push toward four-year degrees by parents and school counselors
- Extremely challenging program, especially writing shorthand at high speeds

Court reporting requires frequent and continuous practice to maintain a high level of competency demanded by clients, particularly for attorneys who use realtime (the instant transcription of shorthand into English displayed on an attorney's laptop or iPad). Some students drop out before they reach the skill set required to become a freelance or official court reporter.

Certified Shorthand Reporters (CSRs) are highly trained, licensed professionals who transcribe spoken words using a stenotype machine in a wide variety of settings, not just in court. Reporters "translate" spoken English words into shorthand and later back into English to provide a written transcript of the proceedings. The stenotype machine enables court reporters to write words using a letter or a combination of letters to represent a sound, a word, or a phrase. This allows them to write text much faster than on a standard computer keyboard.

CSRs fill a critical role in the justice system: They provide verbatim transcripts of judicial proceedings and ensure that nothing compromises their accuracy. Court reporters are present in court hearings, trials, and other litigation-related sessions such as arbitrations and depo-

sitions. As the official keepers of the record, the court reporter may be the sole person in a legal proceeding that is neutral, unbiased, and without attachment to the outcome.

Freelance reporters represent approximately 72% of all court reporters. They are independent contractors associated with one or more court reporting agencies. The biggest demand for freelance court reporters is depositions. Experienced freelance reporters are in demand to report high-level cases in depositions throughout the world.

CURRENT STATUS

The closure of several court reporting schools and the resulting decline in applicants have greatly impacted the number of court reporters certified to practice each year in California.

Many of the California courts who have laid off official reporters are hiring them back through the freelance market on an as-needed basis. Some court systems have pursued digital recording as a means of making the record, particularly for routine legal proceedings such as traffic and family court. However, California is one of three states currently limiting digital recording (also Texas and New York).

The average salary for court reporters is competitive with other professions requiring four-year degrees - \$30,000 to \$100,000. Those numbers can multiply for experienced reporters who are adept at handling the demands of multiple parties' unique needs, especially in global, class action, and complex litigation cases involving the use of state-of-the-art technology.

WHAT IT TAKES TO BECOME A COURT REPORTER

Courage. Stamina. Self-discipline. Determination. Self-esteem. Perseverance.

Court reporting schools offer shorthand machine theory and speed-building classes that prepare students for the stringent state licensing Certified Shorthand Reporter (CSR) exam. Students also undergo intensive instruction in English, grammar, punctuation, spelling and word usage; legal and medical terminology; deposition and court procedures; computer-aided transcription programs; and current California laws related to court reporting.²

In addition, reporting students learn about the rules of ethics, confidentiality, and how to maintain a professional demeanor, no matter how poorly others behave in your presence.

For full-time reporting students, it takes an average of three to five years to get through school and pass the CSR exam. An average of 20% of students pass the first time.

Courses are self-paced, challenging, and require self-discipline and a high degree of motivation. Failing at exams given throughout the course can be disheartening. Reporters need on-going emotional and moral support from family and friends.

GETTING LICENSED

The Court Reporters Board of California (CRB), a branch of the Department of Consumer Affairs, is both the licensing and disciplinary body of all reporters practicing in California (as the State Bar of California is for attorneys). Without a CSR license, reporters cannot report in California except in certain instances where a license is not needed - i.e., public hearings (ironic, because these are some of the most difficult matters to report).

After attending a State-approved court reporting school and passing a qualifying exam, becoming a licensed CSR requires passing a three-part licensing exam: Live Dictation, Professional Practice Skills and English.

OTHER REPORTING OPPORTUNITIES

The ability to transcribe the spoken word very quickly has led to a wide range of opportunities in the fields of broadcast captioning and CART captioning (Communication Access Realtime Translation) - reporting for people who are hearing impaired, like you see on TV. Both offer the opportunity to transcribe the spoken word in different settings, whether it's a sporting event, university, religious or civic service, news broadcast, or other form of entertainment. Captioners have provided real-time text to support the media in high-profile trials, corporate board meetings, and medical settings.

Reporters use the same process for webcasts, instantly transmitting captions (instantly translated shorthand into English) to the computer screens of all parties via the Internet.

The beauty of captioning is that you can report at home in your pajamas anywhere in the world!

With more than 48 million Americans experiencing hearing loss in at least one ear, the need for broadcast and CART captioning has expanded greatly in recent years. As the population continues to age and, with it, the incidence of hearing loss increases, demand for CART captioning in various public settings will likely continue to grow. In addition, continued pressure by the ADA and other groups will bring increased captioning demand to churches, medical facilities, and other arenas.

The Federal Communications Commission (FCC), which regulates interstate and international communica-

Continued on page 20

WANTED REPORTERS

Continued from page 19

tions by radio, television, wire, satellite, and cable, adopted new rules in early 2014 to improve the quality of television captioning after widespread frustration among the viewing public with the inconsistencies in captioning quality. Demand for trained broadcast captioners could continue to grow in an environment of revising and improving captioning quality.

IN SUMMARY

According to Ducker Worldwide, a premier consulting and research firm, the demand for reporters in California will increase from the current 7130 to 8430 in 2018. With the diminished supply of reporting students currently in schools, the projected licensed CSRs in 2018 will be 6110, creating a shortfall of 2320.

Tell your friends, family and co-workers, and shout it from the rooftops – Go to court reporting school and start a valuable career with instant placement!

FOOTNOTES

1 Ducker Worldwide, 2013 – 2014 Court Reporting Industry Outlook Report.

2 Court Reporters Board of California, Launching a Career as a Court Reporter.

LS

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presentations · proposals · trial exhibits

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Creative Director

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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 NINE GREAT REASONS WHY YOU SHOULD BECOME A SECTION MEMBER:

1. Reasonable annual dues. (\$20.00 per section; \$75.00 for all six!)
2. Continuing Education in all areas of the law.
3. Quarterly educational programs -- Free to Section Members.
4. Quarterly newsletters containing up-to-date information, including changes in the law, new forms, and legal articles.
5. Statewide roster of all members in all sections, for easy access to local procedural information in other counties.
6. California Certified Legal Secretary®/MCLE/Paralegal CLE credits.
7. Networking provides a forum for the exchange of information.
8. Respect from employer when you pass on valuable information obtained at workshops and seminars.
9. Professional and personal excellence.

For more information, contact Cheryl L. Kent, PLS, CCLS, Legal Specialization Sections Coordinator. Office: (925) 837-0585; Email: clkcls@comcast.net

California Certified Legal Secretary
A Program of
Legal Secretaries, Incorporated



APPLICATION

Mail your Application to the below address along with
the appropriate fees payable to "LSI" and copy of LSI membership card (if applicable).
CCLS Certifying Board, 14403 Leibacher Avenue, Norwalk, CA 90650

(Select one)	(Select one)
<input type="checkbox"/> Northern California	<input type="checkbox"/> Saturday, March 21, 2015
<input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, October 17, 2015

- **Deadline:** Applications must be received 60 days prior to the examination date.
- **Late Application:** Late Fees apply when Applications are received less than 60 days (but not less than 30 days) prior to the examination date, and accepted only if space is available.
- **Deferral:** Requests to defer to the next scheduled exam date must be received at least 14 days prior to the exam date.

EXAMINATION FEES (subject to change without notice)

<u>LSI Members</u>	<u>Non-LSI Members</u>
On Time Registration Fee \$ 25.00	On Time Registration Fee \$ 75.00
Examination Fee 100.00	Examination Fee 100.00
Late Fee (if applicable) 30.00	Late Fee (if applicable) 30.00

Personal Information

Name: _____

Mailing Address: _____

Last 4 digits of SSN: _____ Email: _____

Phone (Day): _____ Phone (Evening): _____

LSI Member: ☐ Yes (*enclose copy of LSI Membership Card*) ☐ No

Name of Local LSI Association: _____

Employment Information

Provide your legal secretarial employment information beginning with your most recent (or current) employment in order to confirm that you have at least two years' experience. Attach a supplemental page if you have not been in your current position for two years.

Position: _____ Dates of Employment: _____

Employer: _____
(name and address)

Supervisor: _____ Supervisor's Phone: _____

Supervisor's Email: _____

Summary of Duties: _____

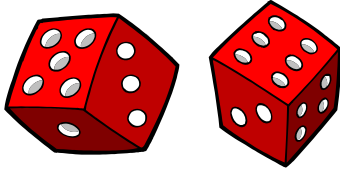
I certify that I have completed this application truthfully. I understand that a false statement may result in the rejection of this application or revocation of my certification. I understand and agree that the contents of the examination are confidential and not to be discussed with anyone, and that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

Date: _____

Applicant Signature _____

SAN FERNANDO VALLEY LEGAL SECRETARIES ASSOCIATION
INVITES YOU TO

LSI Vegas



***"What Happens at Conference ~
Stays at Conference"***

LSI 3rd Quarterly Conference

February 19-21, 2015

The Beverly Garland
North Hollywood, California



HOTEL REGISTRATION FORM

HOTEL INFORMATION:

The Beverly Garland
4222 Vineland Avenue
North Hollywood, CA 91602
(818) 980-8000 / (818) 766-0112 Fax
www.beverlygarland.com

ROOM RATES:

\$159.00 Single / Double
\$169.00 Triple
\$179.00 Quade

Plus 14% Occupancy Tax Per Night
City TOT 1.5% Per Night and
\$0.15 CA State Tourism Tax Per Night

ROOM RESERVATIONS:

Please contact the hotel directly at 1-800-BEVERLY (1-800-238-3759) or book online at
<https://bookings.ihotelier.com/bookings.jsp?groupID=1150760&hotelID=86288>

GROUP BOOKING CODE: SFV

CHECK IN/OUT:

Check-In Time: 3:00 p.m. / Check-Out Time: 12:00 p.m.

SELF PARKING:

\$7.00 per day / \$14.00 per night for overnight guests

AIRPORTS:

Burbank (Bob Hope) 5 miles from hotel
Los Angeles International (LAX) 17 miles from hotel



QUESTIONS/GENERAL INFORMATION:

Cathie Sorensen, Registration Chair
Cathie.Sorensen@blueshieldca.com

Lisa De La O, Conference Chair
(818) 715-7025 or ldelao@fitcheven.com

www.sfvlsa.com

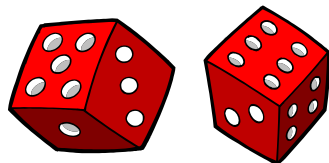
*Hotel provides complimentary shuttle service to
Universal Studios, City Walk, and Metro Red Line
Subway Station*

No Airport Shuttle Service Provided

DEADLINE FOR GROUP RATE IS JANUARY 23, 2015

SAN FERNANDO VALLEY LEGAL SECRETARIES ASSOCIATION
INVITES YOU TO

LSI Vegas



***"What Happens at Conference ~
Stays at Conference"***

LSI 3rd Quarterly Conference

February 19-21, 2015

The Beverly Garland
North Hollywood, California



CONFERENCE REGISTRATION FORM

Name (as it will appear on badge): _____
Mailing Address: _____
City/State/Zip: _____
Home/Cell Telephone: _____
Work Telephone: _____
Email Address: _____
Local Association (please spell out): _____ LSA/LPA

PLEASE INDICATE IF YOU ARE:

	<u>Title</u>	
____ State Officer	_____	____ Governor
____ State Chairman	_____	____ CCLS ____ PLS

SCRIP (Includes Registration, Welcome Reception, Banquet, and Brunch)

POSTMARKED ON OR BEFORE JANUARY 20, 2015	\$ 116.00	\$ _____
POSTMARKED JANUARY 21, 2015 OR LATER	\$ 126.00	\$ _____

INDIVIDUAL TICKETS

____ Registration PRIOR to January 20, 2015	\$ 15.00	\$ _____
____ Registration AFTER January 21, 2015	\$ 25.00	\$ _____
____ WELCOME RECEPTION (Friday)	\$ 20.00	\$ _____
LUNCHEONS <input type="checkbox"/> Vegetarian Meal		
____ Presidents' Luncheon (Saturday)	\$ 30.00	\$ _____
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Saturday, November 8, 2014 – 4:00 p.m. to 5:30 p.m.		
<u>CIVIL LITIGATION</u> Topic: <i>California Civil Cases: Differences in Federal and State Court Procedures from Beginning through Appeals</i> Speaker: Kathy Miller, ACP Senior Paralegal, FedEx <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member		<u>PROBATE/ESTATE PLANNING</u> Topic: <i>Handling Debts and Creditor's Claims in Trust Administration</i> Speaker: Valerie A. Powers Smith, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member

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1. Points and authorities for motions for summary judgment are limited to how many pages?
 - a. 10 pages
 - b. 15 pages
 - c. 20 pages
 - d. 25 pages
2. Which of the following is responsible for the day-to-day operations of a corporation?
 - a. Incorporators
 - b. Officers
 - c. Shareholders
 - d. Directors
3. Which of the following are grounds for dissolution?
 - a. Irreconcilable differences and adultery
 - b. Incest and bigamy
 - c. Irreconcilable differences and incurable insanity
 - d. All of the above
4. The _____ appraises all cash and money accounts and insurance proceeds.
 - a. Probate referee
 - b. Court clerk
 - c. Heir
 - d. Personal representative
5. Responses to personally served written discovery in unlawful detainer matters are due within ____ days.
 - a. 5 days
 - b. 10 days
 - c. 15 days
 - d. 30 days
6. The last day to complete discovery is ____ days prior to the initial trial date.
 - a. 10 days
 - b. 15 days
 - c. 30 days
 - d. 45 days
7. Which type of deed does not contain any implied or express covenants?
 - a. Quitclaim Deed
 - b. Warranty Deed
 - c. Deed of Trust
 - d. Grant Deed
8. The Statement of Information for a limited liability company must be filed within 90 days of filing the Article of Organization and every _____ thereafter.
 - a. Every 6 months
 - b. Every year
 - c. Every other year
 - d. Every 5 years
9. The time for a defaulting party to appeal the default judgment is ____ days from the date the notice of entry is served, or ____ days from the date of the default judgment.
 - a. 180 days / 60 days
 - b. 30 days / 90 days
 - c. 90 days / 30 days
 - d. 60 days / 180 days
10. Which of the following marriages are considered void?
 - a. Incestuous, unsound mind, incapacity
 - b. Incestuous, bigamous/polygamous
 - c. Under age of consent, bigamous/polygamous
 - d. All of the above

SEE PAGE 29 FOR QUIZ ANSWERS

ANDREA GOLDSMITH received her B.A. in Communication from the University of Southern California Annenberg School for Communication and Journalism. She has worked as a legal secretary or paralegal for 17 years and is currently completing her Paralegal Certificate at UC Riverside.

Andrea is a member of the Desert Palm Legal Professionals Association and the Inland Counties Association of Paralegals and works in the Litigation Department of Slovak Baron Empey Murphy & Pinkney LLP.



Why the “Haves” Still Come Out Ahead: Galanter’s Hypothesis Revisited

BY ANDREA GOLDSMITH, DESERT PALM LPA

I have worked on hundreds of cases as a legal assistant, yet I am still surprised by how litigation works for some people, fails for others, and how cases are fought and won in court. For the teenager this year who wielded the defense, “I’m a spoiled rich kid who’s never had to pay any consequences” (“the Affluenza Defense”¹), it was literally being wealthy that seemed to work to find him inculpable.²

An interesting writing about legal inequality was the topic of a political science article I read in college, *Why the “Haves” Come Out Ahead: Speculations on the Limits of Legal Change*, by Marc Galanter.³ He introduces a framework by which to view legal inequality from a nontraditional perspective. Rather than examining how the legal system affects people from a victimized standpoint, he analyzes the parties and how the differences between them affect how the legal system generally works. The premise of the article is that in the system of American legal battles, there are two types of parties – one-shotters (“OSs”) and repeat players (“RPs”) – and RPs have the advantage.

OSs are people who rarely need legal assistance. I have had one legal matter occur in my lifetime – when I fell down some stairs at a Las Vegas nightclub years ago, dislocating my kneecap. I sought legal counsel because 1) the stairs had no railing to grab during my fall; and 2) I was seriously injured, which alters the way I approach certain activities today. My case was taken on contingency; I received a speedy settlement, and my lawyer was promptly paid. A pure OS situation.

Absent a life-changing event (i.e., divorce, personal injury, criminal proceedings, etc.), it is not a consistent practice for OSs to retain counsel. If we do become involved in litigation, we usually have one opportunity at success relative to a limited number of resources. If we get to court at all, we prevail less on appeal compared to RPs, so the outcomes of the cases we bring do not shape the law as often as cases litigated by RPs. Instead, we are encouraged to settle.

Conversely, RPs are traditionally wealthy, organized groups and individuals who more consistently use the legal system to settle disputes. They have less at stake, compared to the costs of initiating or defending a lawsuit, so they “are able to structure the next transaction and build a record,”⁴ often “settling cases likely to produce adverse precedent and litigating cases likely to produce rules that favor their interests.”⁵ These repeated transactions within the legal system in effect shape common law, so laws tend to weigh in their favor.

Even when large corporations lose legal battles within their respective industries (see *Apple Computers, Inc. v. Microsoft Corp.* (1994) 35 F.3d 1435), they gain “bargaining reputations.”⁶ Their influence increases at the settlement table in future litigation, while also discouraging legal actions.

My point is that the types of cases that change and create new laws are usually litigated by RPs, who repeatedly shape the issues that matter to them. It is nearly impossible for OSs to compete in this systematic process unless they develop class actions in matters to effect the change they want to see⁷ or are championed by an RP.

In the landmark case of *Gideon v. Wainwright*, 372 U.S. 335 (1963), the Supreme Court granted certiorari to an indigent criminal defendant, Clarence Gideon, after he lost his case on appeal to the state of Florida. The Court appointed Abe Fortas, a powerful Washington insider, to represent Gideon in oral argument. (The issue to be

Continued on page 29



RYAN METHENY is the Members Program and Educational Partnerships Librarian. After graduating from UCLA School of Law, Ryan practiced as an attorney at a public interest firm in Berkeley focused on First Amendment issues. He then transitioned to librarianship to focus on his passions of research and education, and earned a master in library and information science from the University of Washington. When not on the reference desk, Ryan coordinates many programs at the library, including the Members Program, the MCLE program, tours and workshops for high school students, and the law student externship program. He also teaches legal research as an adjunct instructor at the University of Southern California School of Law.

Finding Forms and Templates: Save Your Firm Time and Money

BY RYAN METHENY, LOS ANGELES LSA

Legal secretaries and paralegals are often called upon to complete legal research tasks. While lawyers do much research on their own, knowing how to assist with, or independently complete, these types of tasks can make a legal secretary or paralegal very valuable.

Although legal research takes many years to master, one can become proficient fairly quickly at finding forms and templates. A legal secretary or paralegal who can find a good form memorandum of points and authorities, for instance, can save an attorney a tremendous amount of time and effort, and save the client a lot of money.

Of course, one great place to start for either transactional or litigation forms is a firm's own bank of previously used documents. Another important starting point to look for litigation forms, as most already know, is the Judicial Council's collection of forms, available at <http://courts.ca.gov/forms.htm>. One should be careful to check the Judicial Council's website regularly, however, because the Judicial Council updates its forms frequently, and courts may not accept an older version. (In fact, it may be good practice to fill in Judicial Council forms from the website each time, rather than downloading the forms to the firm's server.)

Outside of these two obvious places, the most comprehensive published source for litigation forms is California Forms of Pleading and Practice, available on LexisNexis and in your local county law library. This title contains 579 chapters across 51 volumes, covering subjects from adoption to zoning and 577 topics in between. Each chapter contains not only form pleadings, motions, and other court documents, but also valuable summaries of the law and instructions on use of the forms.



If a firm's Lexis subscription does not include Forms of Pleading and Practice (and it is expensive), county law librarians can be contacted by phone or online to help find the right Pleading and Practice form. Once identified, many county law libraries, including LA Law Library, offer electronic delivery of documents like forms for a small fee.

Other sources for litigation forms include the Rutter Guides (available on Westlaw), Matthew Bender guides (available on Lexis), and Continuing Education of the Bar (CEB) guides (available through CEB Onlaw). Chances are, at least one of these publishers will have a practice guide for the particular type of case being litigated, and all of them include useful forms. If one guide does not have what the attorney needs, check with a county law librarian to see what else is available in the attorney's area of practice.

While most litigation forms help lawyers format documents properly and provide the necessary "legalese" – freeing up the attorney to focus on the actual argument to the court – what many lawyers do not know is that there are also good sources available for sample legal arguments, complete with citations to relevant case law and statutes.

FINDING FORMS AND TEMPLATES

The largest such source for sample legal arguments is California Points and Authorities, a sister publication to Pleading and Practice. (Pleading and Practice will frequently cite relevant sections in Points and Authorities, and vice versa.) Another unique and useful source for sample legal arguments is the Rutter Guide Opposing California Civil Motions: Model Opposition Briefs. Form opposing papers, like oppositions to demurrer, can be very hard to find, and this is one of the few publications that provides them.

For transactional matters, like wills and trusts, contracts, and real estate, the most comprehensive publication available is California Legal Forms: Transaction Guide (published by Lexis). Containing 125 chapters across 36 volumes, this publication has a tremendous range of forms for legal documents ranging from corporate bylaws to powers of attorney to prenuptial agreements. CEB also publishes a wide variety of practice guides aimed at particular

types of transactions, such as Office Leasing: Drafting and Negotiating the Lease, Advising California Common Interest Communities, and California UCC Sales and Agreements, to name a few. For a full list of CEB guides, visit www.ceb.com.

These are just the most frequently used sources for legal forms, and really only the tip of the iceberg of what is available in large collections like those maintained by LA Law Library. Chances are, no matter how unusual a case may seem, a set of forms and templates is available to save the attorney time and headache. The legal secretary or paralegal who can find the right forms can be a lifesaver.

Check out the library at www.lalawlibrary.org or call 213.785.2529 for reference assistance, e delivery of legal resource materials, public classes and MCLEs, room rentals and events hosting. **LS**

WHY THE HAVES STILL COME OUT AHEAD

Continued from page 27

decided was whether the Sixth Amendment's right to counsel could be extended to felony defendants in state court criminal cases who could not afford legal counsel.)

Fortas had argued cases in the Supreme Court before and was a member of a legal committee organized by Chief Justice Warren. He was also on friendly terms with three of the Associate Justices (Lewis 51-52), allowing him to strategize his arguments around the judges' likes, dislikes and past decisions more aptly than someone without the connections. This transformed his client from an OS to an RP. Had he been a less experienced attorney without the advantages of an RP, the chances that history would have been made are dim.

Legislation created to assist OSs is also constantly being manipulated by big business. Consider something as common as a consumer warranty and how often it is abused by companies who refuse to honor it. Although this is frustrating to individual consumers, they still do not have the necessary means to take the RP to court. Even if they did, there will undoubtedly be a mediation clause buried within the warranty so that the OS has to adjudicate the matter outside of the court where the company can assert its will more freely. "[T]o the extent that a one-shotter consumer returns to the public courthouse to seek relief after disputing in a private forum, she does so with fewer rights."⁸

Being an RP or an OS is not always straightforward, but most of the time an RP surpasses an OS in successful litigation. This is the reality. OSs are not completely powerless, but they are vulnerable to the legal structure that is in place and controlled by RPs.

FOOTNOTES

- 1 Dr. Michelle London, No, Affluenza Is Not a Real Thing, The Daily Beast (Dec. 16, 2013), <http://www.thedailybeast.com/articles/2013/12/16/no-affluenza-is-not-a-real-thing.html>.
- 2 Texas v. Couch (Dec. 12, 2013, Dist. Court, Tarrant County, Tex.) (wealthy juvenile receives 10 years' probation after driving while intoxicated and killing four people, fully paralyzing a fifth).
- 3 Mark Galanter. Why the "Haves" Come Out Ahead: Speculations on the Limits of Legal Change (9 Law & Soc'y Rev. 95-151 (1974)).
- 4 See Id. at 98.
- 5 Shauhin Talesh. How the "Haves" Come Out Ahead in the Twenty-First Century (62 DePaul L. Rev. 519 (2012-2013))
- 6 See Galanter at 125.
- 7 Id. at 142-143.
- 8 See Talesh at 522. **LS**

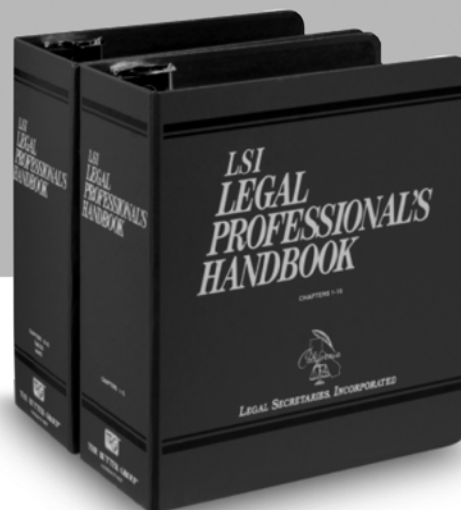
QUIZ ANSWERS FROM PAGE 26:

- | | | | |
|--------|--------|--------|---------|
| 1. (c) | 4. (d) | 7. (a) | 10. (b) |
| 2. (b) | 5. (a) | 8. (c) | |
| 3. (c) | 6. (c) | 9. (d) | |

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Dates to Remember in 2014 - 2015

October 28, 2014	Deadline to register without late fee for Legal Specialization Seminars at August conference	January 5, 2015	Last day to register for LSI Beginning Legal Secretarial Training class
November 7-9, 2014	LSI Second Quarterly Conference Hilton Palm Springs <i>Hosted by Desert Palm LPA</i>	January 12, 2015	LSI Beginning Legal Secretarial Training class opens
November 7, 2014	CEC Workshop at November Conference Indian Real Property Leases and Sales	January 13, 2015	LSI CCLS On-Line Study Group class begins
November 8, 2014	CCLS Workshop at November Conference Legal Computations - Calendaring	February 19-21, 2015	LSI Third Quarterly Conference The Beverly Garland Hotel, North Hollywood <i>Hosted by San Fernando Valley LSA</i>
December 1, 2014	Deadline for submission of articles for February issue of <i>The Legal Secretary</i>		
December 31, 2014	Last day to register for LSI CCLS On-Line Study Group		

Helpful Websites

Supreme Court of the United States

<http://www.supremecourt.us>

Office of the Attorney General

www.ag.ca.gov

California Courts

<http://www.courtinfo.ca.gov>

California Assn. of Legal Support Professionals

www.calspro.org

California Codes

<http://www.leginfo.ca.gov/calaw.html>

California State Bar

http://www.calbar.ca.gov/state/calbar/calbar_home.jsp

California Legislative Information

<http://www.leginfo.ca.gov>

U.S. Citizen and Immigration Services

<http://www.uscis.gov>

Administrative Office of the U.S. Courts

<http://pacer.psc.uscourts.gov>

American Medical Association

<http://www.ama-assn.org>

American Association of Law Libraries

<http://www.aallnet.org>

National Notary Association

<http://www.nationalnotary.org/index.cfm>

California Secretary of State

www.sos.ca.gov

National Court Reporters Association

<http://www.ncraonline.org>

California Judicial Council, Civil Jury Instructions

http://www.courts.ca.gov/partners/documents/caci_2014_edition.pdf

THE CHANGING ROLE OF THE LEGAL SECRETARY

Continued from page 14

ATTITUDE x SKILLS = EMPLOYABILITY

Attitude tying directly into one's adaptability. The worse someone's attitude was, the less willing or able they were to adapt to a new set of circumstances or changes. There were many experienced secretaries with AMAZING skills, but because their attitude was perceived as negative or inflexible, they were eventually terminated.

Some of the phrases that can make someone seem less than adaptable and/or can occur as someone having a negative attitude include:

NO I won't	NO I don't
NO I can't	NO I haven't

**This includes learning new technologies, accepting new attorney pairings and/or doing ANYTHING differently than you have done it before.*

Those secretaries who were more experienced, but were willing to try something out (even if it meant failing at first), were considered to be more adaptable and to have a better attitude. All it took was a little effort on the sec-

retary's part. If he or she tried, they were typically given more opportunities to stay and eventually succeed, which they did.

We all know that the economy is still in recovery mode and that jobs are still not as plentiful as they once were, but the good news is that good people, with good attitudes, who are flexible and willing to try, are still being hired in great jobs. We cannot control the changes that law firms are going to continue to make with regards to secretarial pairings, how they are going to utilize secretaries and/or new technologies that may be implemented.

At the end of the day the only thing we have control over is actions and our perspective. If you can look at the changing role of the legal secretary as an opportunity to learn and grow, you will be successful and will continue to have a long and prosperous career as a legal secretary. **LS**



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LSI BYLAWS AND STANDING RULES* As currently adopted by the LSI Governors. Download for free at www.lsi.org	5.00		
LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER An 8 1/2" x 11" advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/2012)	N/C		
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