



1936-2016

Vol. 80,
Issue No. 10
February 2017

HEARSAY

A Monthly Publication of the
San Francisco Legal Professionals Association

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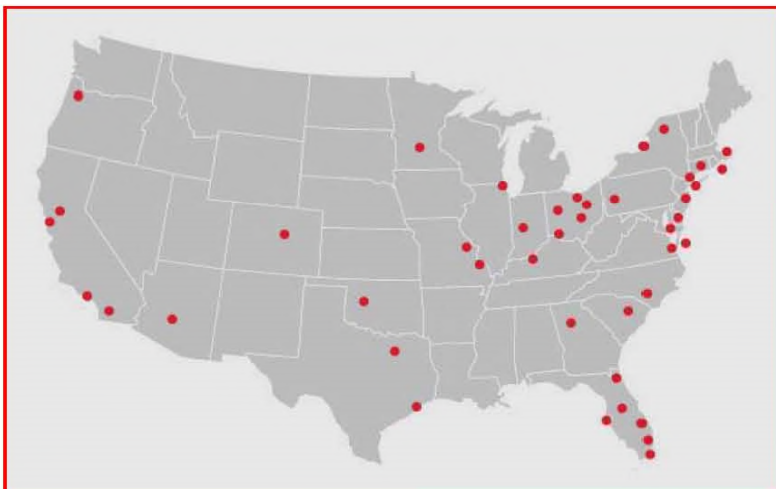
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TABLE OF CONTENTS

<i>2015-2016 Officers and Chairpersons</i>	5
<i>President's Message</i>	8
<i>Call for Nominations</i>	10
<i>Legal Blog</i>	13
<i>Scholarship/Career Promotion</i>	34
<i>Chapter Achievement</i>	35
<i>Upcoming Events</i>	36
<i>Legal Specialization</i>	44
<i>Membership Application</i>	46
<i>Membership Renewal Form</i>	47
<i>Change of Address Form</i>	48
<i>LSI Benefits</i>	50
<i>Editor's Message</i>	51

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PRESIDENT'S MESSAGE – FEBRUARY 2017

Greetings SFLPA Members and Friends:

As move through February, things are rapidly coming to end for the 2016-2017 fiscal year. We opened the year big by co-hosting the Annual Conference in May of 2016. We plan to end big as well with our 80th Anniversary Celebration Event. So 'Save the Date' – April 22, 2017. A notice will sent to everyone in the upcoming days, if you have not already received it by the time our newsletter is released.

This is a lite month for us as we only have two SFLPA/LSI events on calendar:

- February Brown Bag Presentation – Tuesday, February 28, 2017

Covering Criminal Law The topic: "The Impact of Propositions 57 & 62 – the new laws on Legalizing Marijuana & the Early Release from Prison" which voters passed as a result of the November Elections. Our Presenter: Betsy Wolkin, Esq., of the SF Bar Association

- LSI Quarterly Conference – February 24-26, 2017 – Chico, CA

For a list of educational seminar as well as conference registration information, please go to LSI's website: www.lsi.org – click on the 'Upcoming Conference' tab.

Early March, we have a treat for our members, a Probate & Estate Planning Seminar by our very own Life Member, Faye Lee, Esq. of Bresler & Lee, LLP. It's a dinner presentation at Young's Café on Thursday, March 2, 2017. The information has already been sent to out. A reminder will be sent in the coming days.

Also, in March, our Nominations Committee will reveal the slate of individuals who will be running for office at our Elections Meeting scheduled for March 21, 2017, at the offices of Orrick Herrington. The slate of names along with their biographies will be published in the March Issue of the HEARSAY. The information will also be distributed by eBlast through Constant Contact. We encourage you to attend this meeting to let your voice be heard.

Also, we are looking for individuals to join Team SFLPA at the 8th Annual Legal Trivia Throw Down. SFLPA has won two years in row, and as the winners, we are hosting the event. It will be on Saturday, March 25, 2017 at the offices of Nixon Peabody, LLP at One Embarcadero Center. It's fun event, and we anticipate that 7 local bay area associations will have teams at this year's event.

The Jeopardy-style game covers topics of legal nature. It's great for those who are knowledgeable on the different types of law. So, if you know your stuff and would like to join our team, please contact me. We will have a buffet brunch and a Mimosa and Bloody Mary Beverage Station. All of this is covered in the \$25 fee. We will need a few volunteers to be a score and time keeper. Please contact us if you are interested in volunteering. Our guest bartender will be Diane Mecca of Stanislaus County LPA.

Also in March, we will have Brown Bag Presentation. We are in communication with a couple of speakers for this event and we will have a flyer with more information about this presentation in the upcoming week.

And lastly, our 80th Anniversary Celebration Event will be held on Saturday, April 22, 2017, at the United Irish Cultural Center. We are finalizing the dinner buffet options with the venue. Once we have all of that squared away, we will send out the event flyer. We plan to celebrate our 80 Years of Excellence.

Although the program for this event has not been finalized, we plan to remember the past, celebrate the present and look forward to the future. We will also install our officers for the upcoming fiscal year. It will a banquet style event. It's an opportunity for us to get dressed up and celebrate our milestone accomplishment. So please, mark your calendars, bring your family and friends. Let's have ourselves a party and spectacular event.

Our 80th year started big but want to end it with bang!

Respectfully,

Larry McGrew
President 2016-2017



CALL FOR NOMINATIONS

SFLPA OFFICER & DELEGATE ELECTIONS

The 2017 SFLPA Annual Elections Announcement

Nominations Committee Selected

As outlined in our bylaws, the following individuals have been selected to serve on this committee for our upcoming 2017 Elections:

Frances Skaggs – elected by the Board of Directors; Suddie Scott – elected by the General Membership; and Lilian Wong – appointed by the President.

This committee shall nominate candidates for elective office as well as those interested in serving as a delegate at the 2017 Annual LSI Conference.

If you are interested or would like to nominate someone, please review the attached eligibility requirements as well as important information about the positions available and their job duties.

The Committee will present to the Board of Directors its slate of names by **February 15, 2017**. Each individual will be contacted to verify acceptance of the nomination.

The slate will then be published in the March Issue of the Hearsay. Nominations may be made from the floor on the night of the Elections. Those nominated must be present to accept the nomination.

The votes for this election will be cast by ballot. A Chairman and two tellers will be appointed to receive and tally the results. The information is given to the President to announce the results.

In the event there is a single nominee for an office, the ballots process will be dispensed and the President shall declare the nominee elected by acclamation.

We encourage and welcome anyone interested in running for office to do so. We value creative thinking and fresh ideas that will increase the dynamics of our programs for our members.

Please review the list of the positions that will be elected as well as a description of the duties of that office.



Save the Date:

**Election Meeting – Tuesday,
March 21, 2017 – location TBD**

Elected Officers:

**President
Vice President
Secretary
Treasurer**

Appointed Officer:

Parliamentarian

Eligibility for Office:

**Any nominee or appointee at
the time of election or
appointment, must be an active
member in good standing.**

**Any nominee for an elective
office shall be employed in
work of a legal nature.**

**Any nominee for the office of
President shall have served at
least one (1) year as an elected
officer.**

Duties of officers and term of office

Each officer shall keep accurate records and at the conclusion of the term of office shall turn them over to the successor officer.

- President
- Vice President
- Secretary
- Treasurer
- Governor
- Parliamentarian
- Editor – Hearsay

NOTE: The office of Governor will not appear on the ballot this year as the term of that office is a two-year term. See information provided under 'Term of Office' below.

Term of Office

Officers shall be elected at the annual meeting, in the manner hereinafter provided, and shall hold office for one (1) year or until their successors are elected and qualify, except that the Governor shall be elected for a term of two (2) years. All officers elected shall take office as of May 1, 2017.

Vacancies

A vacancy in any elective office, except the office of President, shall be filled for the unexpired term by recommendation of the Board and by majority vote at the first regular meeting following the effective date of the vacancy. In the event of a vacancy in an appointive office, the President shall promptly fill the vacancy.

Election of delegates and alternates

At the Annual LSI Conference, each association is represented by having three delegates with voting power at the Annual Board of Governors Meeting. The Governor and incoming President will make two of the three delegates. The SFLPA will be electing another individual who will serve as the third Delegate as stated in the bylaws.

SFLPA will also elect an alternate who will go to the conference and be readily available, if needed, at the Board of Governors Meeting. The person with the highest total of votes will be declared the third Delegate. The person with the second highest votes will be declared the alternate.

The elected Delegates will represent this association and shall cast the vote of the Association upon any matter requiring a vote at the Conference. The results of the election shall be submitted to the Executive Secretary of LSI by certificate and will be authenticated by the President and Secretary of this association.

For those planning to run for the Delegate position, you will need to plan to attend the 83rd Annual Conference scheduled for May 18-21, 2017 at the Doubletree Hotel in Modesto, California.

The SFLPA will pay for travel, hotel and costs associated as outlined by Standing Rule 18:

The amount to be contributed to the expenses of delegates and alternates to the annual LSI Conference shall be determined by the membership at the Annual Meeting held in March. The following expenses incurred by a Delegate shall be paid when registering for the Annual Conference: scrip tickets, hotel room (one-half double occupancy), \$25 per diem for three days, and transportation to and from the conference. If transportation is by car, the current IRS allowable rate will be paid for mileage to and from the conference.

For those who have thought about getting involved with the SFLPA and LSI, the Delegate position is the perfect position to test the waters and experience an LSI Conference.

Contact our nominations committee

If you have questions about the election process, serving as a delegate or would like to learn more about any of the elected offices, please contact our Nominations Committee.

You may nominate yourself or you may nominate a fellow SFLPA Member. Please be sure to review the eligibility requirements to make sure your nominee meets the criteria. Also, anyone nominated must accept the nomination. So, if you are thinking of nominating someone, reach out to them and have that conversation.

The deadline to submit nominations is **February 15, 2017**. However, we will be taking nominations from the floor the evening of our Election Meeting on **March 21, 2017**.

Feel free to contact any of our Board Members, we are available to answer your questions. Volunteering for a nonprofit organization is a very fulfilling experience. We hope that you will consider the opportunity to help others achieve their goals.

Committee Contact Information:

Frances Skaggs – email: francieskaggs@gmail.com

Suddie Scott – email: sscott5204@yahoo.com

Lilian Wong – email: earthqueen2001@yahoo.com

For more information about both SFLPA and LSI, please review their websites at www.sflpa.org and www.lsi.org.

By: Ryan Halog

February 2017

AGREEMENTS / CONTRACTS

Which Contract Form Should You Use?



Deciding which form to use for your agreement will depend on several factors, including who the parties are, what they want to accomplish, their level of sophistication, and the amount of time and money they are realistically willing to invest in the transaction. Here are five types of agreements to consider for your next client.

Enforceable agreements can come in several forms, including:

1. **Letter agreement outlining the major points of the parties' transaction.** This type of agreement, usually sent by one party, should be acknowledged and agreed to or accepted by the other party or parties. It will lack the details of some of the other forms, making it harder to interpret and enforce if disputes arise.
2. **Printed form agreement.** Many stationery stores sell printed form agreements for a variety of common transactions, such as leases or property transfers. These forms, by design, seldom address unusual or specific provisions that the parties may want. Counsel can supplement these form agreements for clients who do not need a more tailored agreement, but the cost and inefficiency of supplementing a printed form agreement may make a custom-drafted document a better choice. And keep in mind that *written* terms generally *control* printed terms, and custom-drafted printed terms control printed form terms. (Civ. Code, § 1651; Code Civ. Proc., § 1862.) The best practice is to *include* in any second or supplemental agreement (or an amendment or attachment to a previous or contemporaneous agreement) *a reference* to that other related agreement and designate which document is controlling if a conflict should arise.
3. **Custom-drafted agreement.** This document, prepared by counsel, is usually the most time-consuming and expensive to prepare. But over the life of the transaction, the cost may be justified by the complexities of the transaction, the need to tailor the agreement to the parties' specific needs, and the ability to service the contract without further modifications.
4. **Oral agreement.** Although entering into an *oral agreement* is generally is *not good practice*, an *oral agreement* is *binding* absent *application* of the *Statute of Frauds*.
5. **Electronic agreements.** An agreement created and transmitted by electronic means may not be denied legal effect or enforceability because it is in an electronic form; an *electronic signature* satisfies the legal requirements for a signature, including the *Statute of Frauds*.

You may not always have the choice in deciding which type of agreement to use, because specific types of agreements may be required for transactions governed by special laws and regulations. For example, special laws apply to commercial transactions, such as secured transactions (Com. Code, §§ 9101–9709) and leases of

goods (Com. Code, §§ 10101–10600). And consumer transactions are governed by, e.g., the Consumer Credit Protection Act (15 USC §§ 1601–1693r), the Unruh Act (Civ. Code, §§ 1801–1812.20), and the Credit Card Act (Civ. Code, §§ 1747–1748.31).

The two most important factors to consider when deciding how detailed a written contract should be are (1) the trust between the parties, and (2) the value of the agreement. Parties who have little experience with one another or who inherently distrust each other will appreciate a lawyer who has anticipated the possible turns in their agreement. When the value of an agreement goes up, the parties generally expect that some provisions of the written contract will be more detailed, and many optional provisions will be included. The greatest benefit that the lawyer can serve is to accurately write out the important deal points, and then identify a way for the parties to cooperate when problems arise.

Before you start drafting any contract, there are several preliminary considerations and decisions to make. CEB takes you through them in [*Drafting Business Contracts: Principles, Techniques and Forms*](#), ch. 3. Because electronic contracts and electronic signatures are rapidly replacing paper contracts signed in ink, make sure you are up to speed in this area by viewing CEB’s program [*E-Contracts and E-Signatures*](#) and checking out the chapter on electronic contracting in CEB’s [*Internet Law and Practice in California*](#).

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PERSONAL FINANCE / TAXES

Tax Avoiders Could Lose Their Passports

February 2, 2017 – Not everyone believes that taxes are as inevitable as death. In addition to the “***I-won’t-pay crowd***,” there’s the “***I-can’t-pay contingent***,” and the “***I-forgot-to-pay group***.” Whatever their reasons, they are all considered **delinquent** taxpayers by the Internal Revenue Service (IRS). And that delinquency can now jeopardize their ability to fly.

The rather obscure Fixing America’s Surface Transportation Act (<https://www.gpo.gov/fdsys/pkg/PLAW-114publ94/html/PLAW-114publ94.htm>), FAST for short, passed in December 2015, authorized funds for miscellaneous transportation-related programs. But buried in the bill’s verbiage lies section 32101, which calls for the “revocation or denial of passport in case of certain unpaid taxes.”

In a footnote, buried even deeper in the bill, there is this:

If the Secretary receives certification by the Commissioner of Internal Revenue that an individual has a seriously delinquent tax debt, the Secretary shall transmit such certification to the Secretary of State for action with respect to denial, revocation, or limitation of a passport pursuant to section 32101 of the FAST Act.

To qualify for such extreme measures, the outstanding taxes must exceed \$50,000, and all available means to collect the tax must have been exhausted, without success.

Having one’s passport revoked potentially limits more than just international travel. In some states, drivers’ licenses do not meet the standards set by the REAL ID Act (<https://www.dhs.gov/real-id-and-you-rumor-control>), and will not be accepted by airlines for domestic flights after January 22, 2018. For most travelers, that will leave a valid passport as the next option for check-in identification.

Of course, the average taxpayer is not likely to get \$50,000 behind in her/his IRS payments. And even then, engaging with the IRS to resolve the matter will keep things from escalating to the point of passport revocation.

According to its [IRS] website, which now features a page entitled “[Revocation or Denial of Passport in Case of Certain Unpaid Taxes](#)” – see copy of publication immediately following below, obtained directly from the [irs.gov](#) website – the IRS will begin notifying the State Department of delinquent taxpayers in “early 2017.” So, if you are one of *them*, be warned: *The clock is ticking!*

Revocation or Denial of Passport in Case of Certain Unpaid Taxes



The IRS has not yet started certifying tax debt to the State Department. Certifications to the State Department will begin in early 2017, and this webpage will be updated to indicate when this process has been implemented. The information presented here is for informational purposes only.

If you have seriously delinquent tax debt, IRC § 7345 authorizes the IRS to certify that to the State Department. The department generally will not issue or renew a passport to you after receiving certification from the IRS.

- [Certification of Individuals With Seriously Delinquent Tax Debt](#)
- [Annual Adjustment for Inflation](#)
- [Taxpayer Notification - Notice CP 508C](#)
- [Reversal of Certification - Notice CP 508R](#)
- [Judicial Review of Certification](#)
- [Payment of Taxes](#)
- [Passport Status](#)
- [Travel](#).

Upon receiving certification, the State Department may revoke your passport. If the department decides to revoke it, prior to revocation, the department may limit your passport to return travel to the U.S.

Certification of Individuals with Seriously Delinquent Tax Debt

Seriously delinquent tax debt is an individual's unpaid, legally enforceable federal tax debt totaling more than \$50,000* (including interest and penalties) for which a:

- Notice of federal tax lien has been filed and all administrative remedies under IRC § 6320 have lapsed or been exhausted; or
- Levy has been issued.

Some tax debt is not included in determining seriously delinquent tax debt even if it meets the above criteria. It includes tax debt:

- Being paid in a timely manner under an installment agreement entered into with the IRS;
- Being paid in a timely manner under an offer in compromise accepted by the IRS or a settlement agreement entered into with the Justice Department;
- For which a collection due process hearing is timely requested in connection with a levy to collect the debt; and
- For which collection has been suspended because a request for innocent spouse relief under IRC § 6015 has been made.

Before denying a passport, the State Department will hold your application for 90 days to allow you to:

- Resolve any erroneous certification issues;
- Make full payment of the tax debt; and
- Enter into a satisfactory payment alternative with the IRS.

There is no grace period for resolving the debt before the State Department revokes a passport.

Annual Adjustment for Inflation

*The \$50,000 threshold is indexed yearly for inflation.

Under **new Code Section 7345(f)**, in the case of a calendar year beginning after 2016, the dollar amount in new Code Section 7345 shall be increased by an amount equal to (1) such dollar amount, multiplied by (2) the cost-of-living adjustment determined under Code Section 1(f)(3) for the calendar year, determined by substituting "calendar year 2015" for "calendar year 1992" in Code Section 1(f)(3)(B). If any amount as adjusted under the preceding sentence is not a multiple of \$1,000, such amount shall be rounded to the nearest multiple of \$1,000.

Taxpayer Notification - Notice CP 508C

The IRS is required to notify you in writing at the time the IRS certifies seriously delinquent tax debt to the State Department. The IRS is also required to notify you in writing at the time it reverses certification. The IRS will send written notice by regular mail to your last known address.

Reversal of Certification - Notice CP 508R

The IRS will notify the State Department of the reversal of the certification when:

- The tax debt is fully satisfied or becomes legally unenforceable;
- The tax debt is no longer seriously delinquent; and
- The certification is erroneous.

The IRS will provide notice as soon as practicable if the certification is erroneous. The IRS will provide notice within 30 days of the date the debt is fully satisfied, becomes legally unenforceable, or ceases to be seriously delinquent tax debt.

A previously certified debt is no longer seriously delinquent when:

- You and the IRS enter into an installment agreement allowing you to pay the debt over time;
- The IRS accepts an offer in compromise to satisfy the debt;
- The Justice Department enters into a settlement agreement to satisfy the debt;
- Collection is suspended because you request innocent spouse relief under IRC § 6015; and
- You make a timely request for a collection due process hearing in connection with a levy to collect the debt.

The IRS will not reverse certification where a taxpayer requests a collection due process hearing or innocent spouse relief on a debt that is not the basis of the certification. Also, the IRS will not reverse the certification because the taxpayer pays the debt below \$50,000.

Judicial Review of Certification

If the IRS certified your debt to the State Department, you can file suit in the U.S. Tax Court or a U.S. District Court to have the court determine whether the certification is erroneous or the IRS failed to reverse the certification when it was required to do so. If the court determines the certification is erroneous or should be reversed, it can order reversal of the certification.

IRC § 7345 does not provide the court authority to release a lien or levy or award money damages in a suit to determine whether a certification is erroneous. You are not required to file an administrative claim or otherwise contact the IRS to resolve the erroneous certification issue before filing suit in the U.S. Tax Court or a U.S. District Court.

Payment of Taxes

If you cannot pay the full amount you owe, you can make alternative payment arrangements, such as an installment agreement or an offer in compromise, and still keep your U.S. passport.

If you disagree with the tax amount or the certification was made in error, you should contact the phone number listed on Notice CP 508C. If you have already paid the tax debt, please send proof of that payment to the address on the Notice CP 508C.

If you recently filed your tax return for the current year and expect a refund, the IRS will apply the refund to the debt, and if the refund is sufficient to satisfy your seriously delinquent tax debt, the account is considered fully paid.

Passport Status

If you need to verify whether your U.S. passport has been cancelled or revoked, you should contact the State Department by calling the National Passport Information Center at [1-877-487-2778](tel:1-877-487-2778).

If you need your U.S. passport to keep your job, once your seriously delinquent tax debt is certified, you must fully pay the balance, or make an alternative payment arrangement, to keep your passport.

Once you have resolved your tax problem with the IRS, the IRS will reverse the certification within 30 days of resolution of the issue.

Travel

If you are leaving in a few days for international travel and need to resolve passport issues, you should call the phone number listed on Notice CP 508C. If you already have a U.S. passport, you can use your passport until you are notified by the State Department that it is taking action to revoke or limit your passport.

If the Secretary of State decides to revoke a passport, the Secretary of State, before making the revocation, may—

- (a) limit a previously issued passport only for return travel to the United States;
- or
- (b) issue a limited passport that only permits return travel to the United States.

If your passport is cancelled or revoked, after you are certified, you must resolve the tax debt by paying the debt in full, making alternative payment arrangements, or showing that the certification is erroneous.

The IRS will notify the State Department of the reversal of your certification within 30 days of the date the tax debt is resolved.



STATUS REPORT TO CLIENTS

Litigators: Send These 5 Letters to Your Clients



It is crucial that attorneys maintain regular and open communication with their clients. When it comes to litigation, communications often come in the form of status report letters. Here are five letters that litigators send to their clients and what to include in them.

- 1. Letter advising client that attorney has filed a new court action or motion on client's behalf.** The attorney should send a letter right after filing the action or motion telling the client that it has been filed and including a copy of the document. If the attorney filed a motion, the letter should explain how long the other side will have to respond to it and when the hearing will be. The letter should ask the client to call the attorney within a specified number of days to discuss next steps and any questions the client may have.
- 2. Letter advising client that attorney has filed an answer or responses to court action or motion on client's behalf.** The attorney should send a letter after filing the answer or response to let the client know that it has been filed and to give the client a copy of the filing for his or her records. The letter should state when the hearing will take place and ask the client to call the attorney within a specified number of days to discuss next steps and any questions the client may have.
- 3. Letter notifying client of oral deposition.** An attorney must inform his/her client that the opposing party has given notice of the taking of the client's oral deposition. Even though the attorney should include a copy of the formal notice sent by opposing counsel, the letter should reiterate the important details about time and place for the deposition. The attorney should also briefly explain the deposition process and ask that the client call to set up a meeting to prepare for it.

4. **Letter notifying client of case management conference and “meet and confer” requirement.** The attorney should have already discussed with the client how the case is subject to special case management rules. As soon as a case management conference has been set, the attorney should advise the client of its date and time and let the client know that the parties and their attorneys also must “meet and confer” in person or by phone no later than 30 days before the case management conference. The letter should ask the client to set up an appointment with the attorney to discuss the case and choose a date and time to propose to the other side to meet and confer.
5. **Letter notifying client to attend court hearing or trial.** The attorney should [inform the client of the date set for a court trial or hearing](#) and request that the client set up an appointment with the attorney to prepare for court testimony. The letter should be sent well in advance of the trial or hearing date to ensure time for adequate preparation.

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CAREER DEVELOPMENT

The Importance of and How to Find a Mentor

I thought of sharing these articles with our group, and I hope you will find it useful and timely. It was written by A. Harrison Barnes, Chief Executive Officer of The Employment Research Institute. Mr. Barnes' "short" profile is provided at the end of these articles. Kindly share them with those attorneys in your office as they address majority of the issues affecting their profession.

Summary

If you are unemployed, or need a new job, there are many strategies you can use to get a new position. However, nothing is more important, or can be more drastically effective, than having a strong mentor on your side. Anything I could tell you about interviewing, cover letters, resumes, or tracking down jobs would pale in comparison to what a good mentor can do for you. Having a good mentor is *hugely* important.



Whenever I am asked what is the missing link between a promising businessperson and a successful one, mentoring comes to mind. Giving people advice on how they can best achieve their goals is something that is often overlooked. – *Richard Branson*

On a daily basis, I receive emails from people looking for jobs, and who are unemployed. Many of these people have had numerous jobs in their career, and are having a difficult time getting a new job.

If you are unemployed, or need a new job, there are many strategies you can use to get a new position. However, nothing is more important, or can be more drastically effective, than having a strong mentor on your side.

Anything I could tell you about interviewing, cover letters, resumes, or tracking down jobs would pale in comparison to what a good mentor can do for you. *Having a good mentor is hugely important.* (Emphasis added.)

Not having a mentor can be devastating. If you do not have a mentor, much of what happens to you will happen by chance and, when things get rough, there will be no one to protect you.

Everyone needs a mentor. The most powerful people out there all have mentors. Even Donald Trump had a mentor (his father) who helped him get started.

- I have a friend who is a stockbroker and was lucky enough to get a mentor early in his career. This mentor introduced the stockbroker to the most powerful and wealthiest people in Los Angeles, and now the stockbroker is also very wealthy and successful. He is in his mid-30s.
- I have watched countless lawyers lose their jobs (thousands) throughout my career. At the same time, I have seen numerous attorneys with zero business move from firm to firm because they were protected by a mentor.

If you can gain the favor of important people, they will guide and help you in your career. They will help you [find jobs](#), they will make sure you are protected in the jobs you do get, and they will help you be favored for promotions.

- Without a mentor, you may be quite helpless, and a lot of bad things can happen to people without mentors.
- If you do not have a mentor, you are sort of “*playing it by ear*” and may not necessarily know what you are doing.

This is not good. When you see people, who are unemployed and cannot get jobs, it is often because they did *not* get a mentor or advocate to help them along the way. They may have gone through their careers acting self-important, indignant, and arrogant, as if they did not need others help. This is *never* a good thing, and these people are the ones who have the most trouble in the long run.

The most successful people cultivate the favor and advice of powerful and important people in their organizations and profession.

One of the most powerful judges I know in Los Angeles lost her job at a firm I was working for because of a variety of factors beyond her control. She had been playing her cards right throughout her career, had a powerful mentor and could get appointed to be a judge before she was forced to leave the law firm.

I know of a powerful acting coach in Los Angeles who can get people good agents, introduce actors to casting directors, and help them land roles. He has people literally fawning all over him and kissing his ass 24 hours a day because they are trying to gain his favor and get him to mentor them. It is fun to watch. They go pick up his dry cleaning, and do his errands for him in the hopes he will favor them.

A couple of times a year, I am invited to various events put on by banks, venture capitalists, and private equity firms around the country. I have even given various speeches at these events before. I have never understood these events. Basically, investors seek out businesses, which are already successful (or look like they will be) and invest as little as they can for as much return as they can get. Investors are looking to make huge returns. If they could make a loan at 10,000%, they would!

What has always amazed me about these events is that the people attending them seem so eager to get investors—regardless of the terms. In fact, these events are competitive in nature because so many people are seeking the attention of people with money to invest. It is quite crazy really. Even people with very successful

businesses are sycophants (persons who try to win favor from wealthy or influential people by flattering them (also known as brown-nosers, teacher's pets, or suck-ups) desperate for investor dollars.

At the same time, the investors are always sort of playing hard to get, acting self-important, and a little standoffish to the people seeking money. They are often quite arrogant, talk down to the entrepreneurs and have an attitude as if they are “above” these businesses, and do not want too much face-to-face interaction with the people operating the businesses.

Most very successful businesses ([Facebook](#), [Apple](#), [Google](#) and [Amazon](#)) all took lots and lots of investments from venture capitalists and others. In addition, I would say that most of these businesses did not really need the investment, and could have operated and grown (but not as quickly) without the investments.

The terms that entrepreneurs and others are generally offered by investors do not make a lot of sense—on the surface. An entrepreneur might have a fast-growing business and, in exchange for a small amount of money relative to what they are “selling,” they will give up control and a portion of the business to people who can fire them, control how much money they take out of the business, and basically run their lives.

As a business person, I never understood it: ***Why would someone give away their business to a stranger for pennies on the dollar?***

Most investors in businesses are trying to make an incredible return—50x or more of their investment back in a few years. Why on earth would someone take—much less beg—for this kind of investment with these terms? The reason places like [Goldman Sachs](#) make so much money is because they invest very little and get huge returns.

After years of attending these events, I finally fully understood why: ***Most entrepreneurs are seeking a mentor.***

It is as simple as that. People ultimately seek investors because they want mentors. If the entrepreneur takes the investment, they will suddenly have a mentor on their side helping and guiding them along the way.

The investor will:

- Call and check in quite often;
- Make introductions to various people;
- Recommend accounting firms, advertising firms, and others; and
- Give advice about taking future investments, going public, and the overall direction of the business.

Ultimately, the investor gives the entrepreneur guidance that the entrepreneur could not get otherwise. The idea is that the entrepreneur will therefore be that much more successful due to the involvement of the investor.

There is also a bit of a class component to all of this as well. The bankers also generally conduct themselves very well. They dress very well, are generally extremely well-educated, know the most important people, and travel in the best circles. They thus position themselves as having something the entrepreneur may not and offer entrance into a different and better world.

The role of the investor is to be a mentor and offer the prospect of access to a different world. They are paid very well for this in most cases.

I now see these private equity events for what they are: ***Hungry people looking for mentors and help.*** They are almost like “adoption day” in an orphanage where children do everything they can to get a family to take them under their wing.

I have seen countless lives and careers changed when someone took another person's side and became their advocate:

- **In the entertainment business, I have seen numerous people get top agents and acting jobs because someone powerful was on their side.** In fact, having a mentor is almost mandatory for someone to be successful in the entertainment business.
- **I have seen numerous people get jobs in the legal field, that they certainly would not have gotten otherwise, had it not been for someone advocating for them.** I know of numerous attorneys making more than \$1 million a year who would have likely left the legal profession without having an advocate behind them. They lost their jobs, or had other serious issues, and someone stepped in and helped them recover.

When I was in college, a girl I know applied to [Stanford Law School](#) (via mail) on a Monday and received an acceptance letter from Stanford Law School on Friday. While the girl was very smart and had great qualifications, I am pretty sure that she was so quickly accepted by the school because her mentor was a very well-known professor at the [University of Chicago Law School](#). She had taken classes with this person, worked very hard for him, and been dedicated to him.

I have personally hired numerous people because their mentors contacted me, and asked me to help them.

If a mentor is so important, how does one go about getting one?

First, the key is to find the right person to follow. The person you follow generally needs to be very respected and established.

While I am not an expert in this, I have generally found that the *best person to get as your mentor* is often a person that *not everyone is pursuing*. For example, when I was in college, everyone wanted to get a mentor who had won a Nobel prize in economics, or something similar. With hordes of people trying to kiss these peoples' asses, it seemed to be a bad idea.

The mentor you choose should be powerful, but not the same person everyone else is trying to get as their mentor. This means that you will likely be able to stand out. Here is how I chose my mentor in college:

I was taking a class with a professor whose father was a famous Dean at Yale College. I was also very interested in the subject matter this professor was teaching. I knew that he was likely to be extremely well connected in the academic community, and could help me with graduate schools and beyond. By choosing him as a mentor, I almost won a Rhodes Scholarship, and he made sure I got into my first choice of law school. Had I not chosen him, the result would have been different.

The reason this person was a good choice was because no one else was really vying for his attention. Because few people were following this person, I could get him interested in my cause.

Second, you need to connect with the person you are following. Just because you want someone to be your mentor does not mean they will reciprocate this. You need to make some sort of connection with this person.

My mentor in college was an anthropology professor who was teaching a bunch of classes about how Africans adapted in the United States and Caribbean. Most of the students taking these classes were "hippies" who enjoyed the classes, but were not likely to spend their careers doing much to help the people we were learning about. One day, my mentor said something that I thought was quite interesting:

"You guys are all really smart; however, I really hope you do something one day to help the people we are learning about."

I thought this was very moving. That summer, I decided that I would run my asphalt business out of Detroit, and hire all my workers from a drug halfway house. I could then provide them with recommendations for full-time jobs at the end of the summer. I hired around 30 people that summer, and it worked out quite well.

The professor was ecstatic, and loved that I had followed his advice, and he took me under his wing. In all honesty, he may have even given me a better grade in his class the next fall than I deserved, and he certainly helped me a great deal.

Someone is not going to just be your mentor because you ask. You need to earn it, and they need to see that you share the same values. It is natural for people to want to help others they believe stand for the same things they stand for.

Third, you need to show the person that is your mentor that you will give them your unwavering loyalty.

- This means that you will not disagree with them on subjects they are sensitive about.
- It means you will defend them when they are not around.
- It means you will work as hard as you possibly can on the issues and ideas that are important to them.
- It means you will go out of your way to make them feel special (errands, carrying papers, and whatever needs to be done).

You need to show the person you want to be your mentor as much respect as you possibly can.

People like being mentors. It makes them feel important. It makes them feel like they have something to give back. It makes them feel wise. When you seek someone out and make them your mentor (if they will accept that role), you enter a position with them where they theoretically can help you for the rest of your life. Mentors feel proud of this role, and want to help people grow.

My mother started her career working as a secretary for a state senator. He got her an excellent and highly-paid job with the government, and she remained there for most of her career. Throughout my childhood, he continued to check in on her, and advise her on her career.

I want to bring up a few points that are quite relevant to finding a mentor.

First, to find a mentor, it is often going to be necessary that you work with people who are like you. There are cultural and other issues that can affect whether someone ultimately will take you under their wing. Your race, sex, sexual orientation, class background, and more will all impact the sort of mentor you attract. In most cases (not all), someone who is going to be your mentor is more likely than not to have a background quite like your own.

Second, I have a special note for women. If possible, choose a mentor of your own sex. In the clear majority of cases where a younger woman chooses an older man as a mentor, the boundaries of this relationship often result in a sexual relationship. I do not know why—but I have seen this more than I can count. I have seen it with 19-year-old college students, and 50-year-old professors. I have seen it more times than I can count in law firms and companies and elsewhere. Once the sex starts, the relationship changes. Unless the woman truly understands the man, and there are clear boundaries, the *best mentor for a woman is likely to also be a woman*.

Because of the importance of a mentor, I would advise you to take jobs and work in conditions where you are most likely to find a mentor. This is not to say a black woman is not going to get a white woman to be her mentor, or a gay man is not going to get a straight man to be his mentor, but it is less likely to be so. I am just the messenger here, and telling you what I have seen. This is how it generally works. *In a law firm, for*

example, if a partner likes to smoke a lot of pot, the odds are the person he mentors may share the same method of dealing with stress and be of a similar background. This is how it works.

Conclusions

You should seek out and choose environments where you are likely to find a mentor over those where you are not. You need a mentor. The problem with many people is that they think they can do everything on their own. While many people can make it on their own, it is much more difficult without the benefit of a mentor.

Beware!
Once You Start Working in a Law Firm, If You Leave,
You Will Almost Certainly Not Be Able to Return.

Summary

Thinking about leaving your current firm? Read this article before you do.



I speak with attorneys each week who left law firms for a variety of reasons, and now want to return to them. Many are brimming with confidence and mistakenly believe that they are entitled to a lateral position in a prestigious law firm even though they are not currently working in one, or have taken an extended absence.

- Some left their firms and want to return to those same firms after an extended absence of some sort.
- Others left their firms and now want to go to other firms after taking an extended maternity leave or another type of long hiatus.
- Still others left to work in a different practice setting (in-house, government, small firm practice, and so forth), and now want to go back to the kind of law firms they left.

While I hate to be the bearer of bad news, law firms do not look kindly on those not currently working, or not working in law firms: **With limited exceptions, once you leave a law firm, it is difficult (but not impossible) to go back.** Even if you leave your law firm for an extended period due to a personal illness or to take care of an ill family member, for example, it becomes incredibly difficult to transition back into the firm. Even if the firm allows you to return, your days are often numbered.

Why do I say these things? Am I cruel? No, I have been working with attorneys trying to transition back into law firms after leaving them for about two decades now. I have watched repeatedly how law firms treat attorneys trying to lateral who have left firms in their pasts.

If you leave a good law firm for any reason, you better have a contingency plan that involves never working in a prestigious law firm again, because the odds are better than 50/50 that you will not be welcome in one again. It does not matter where you went to law school, or how prestigious your last law firm (or law firms) was (or were), or how much business you had when you were in a law firm. In almost all instances, the attorney who leaves a law firm environment for any reason will find a **cold** reception when he/she tries to return.

There are reasons for this (and I will discuss them), and I will also discuss the variety of people who try to go back, and end up finding a less-than-receptive job market and environment waiting for them when they do.

- See **Why You Can Never Stop Practicing Law for More Than a Few Weeks Once You Start for more information.**

Have you left a law firm and then tried to find a job at another firm later? How was your experience?

A. Can You Leave Your Firm for an Extended Period without Quitting and then Come Back to the Firm?

Attorneys leave their firms for a variety of reasons, and want to come back after doing so. In many cases, the leave is sanctioned by the firm—and in others, it is not sanctioned. I will cover some of the main reasons why attorneys leave their firms and want to come back below.

First, however, I will cover what law firms think about you anytime you take any absence from your firm:

- **You are not there for your clients when you take time off.** Very few other professions are as punishing to people taking time off as the practice of law at a law firm. Law firms serve multiple clients. Anytime an attorney leaves for an extended period, the client may suffer to some extent. In the practice of law, there is a bias that is likely hundreds of years old against attorneys who are not constantly there for their clients. If an attorney takes time off, someone else needs to be brought up to speed, and this costs the client money or means the firm must write off these “*learning*” hours.
- **You are not making the firm money and others are.** When you take time off, you are not billing hours, and others are paying for your time off with their work. All your peers are showing up and working long hours—while you are off doing something else and not working the same hours, or contributing. Law firms are competitive groups by nature, and whether you are a partner or an associate, law firms know that if you are not working, you are not one of the “*earners*” within the firm. *Not being a contributor means that you are taking money from the firm without providing the corresponding hours and benefit to the firm.*
- **You are not committed.** Regardless of why you take time off, the perception is that if you were extremely committed you would “power through” and work regardless of the situation. The law firm will perceive time off you take as a lack of commitment to your career and the goals of the law firm.

See **The #1 Attorney Career Killer That Attorneys Are Never Taught** for more information.

- **You are “milking it” and taking more time than you need.** Law firms will watch you very carefully if you take time off. They will believe (rightly or wrongly) that if you take off too much time, you are taking advantage of whatever the situation is that is leading you to take time off and playing games. They have seen it before, and did not like it. They will hold it against you when you return.
- **You might be lying.** In addition to potentially thinking you are taking more time than you need, in the case of illness, for example, the law firms often believe that you might be lying. They will look for inconsistencies in your story, and whatever they can find to classify you as one of the bad ones.
- **You are expendable, and the law firm can find others without your need for time off.** This is the big one. Law firms believe you are expendable and they are competitive business institutions. They are all about making as much money as possible so they can move up in the rankings. To make this money, they need soldiers and generals who are constantly in the fight always. If a soldier or general is weak and cannot fight, the soldier or general will be replaced. Law firms have very little patience for your issues.

Do you think it is fair for law firms to think the above things about you if you take extended time off?

Here are some of the more common reasons attorneys at large law firms take extended leaves of absences:

1. Maternity Leave (Short-Term and Commensurate with Firm Policy OK, Long-Term Not OK).

It is acceptable for women to take maternity leave and law firms typically do not frown on maternity leave at all. Some law firms even offer several months of maternity leave. There is usually a standard within most large law firms as to how much maternity leave women take. Law firms will not typically look down on people who are not deviating from this norm significantly.

Law firms have become very sensitive to this issue, and thus, so long as the woman is not abusing her maternity leave, taking it will generally not harm her return to the firm. Nevertheless, the sense of commitment, drive, and so forth that characterizes a woman before she takes her maternity leave must still be evident when she returns to the firm after the maternity leave is over. If her career starts to look like it is now coming second, then there will be problems with getting assignments, advancement, and so forth.

The real danger of maternity leave is that, for many women, taking maternity leave causes their natural nesting instincts to take over, and this interferes with their desire to go back to work after maternity leave (or even to go back at all). I speak with women on an ongoing basis who are on maternity leave and want to try and find a new job while they are still on maternity leave. They may want a firm with fewer hours, a firm closer to home, or a firm that will let them work from home one or more days a week (or every day). None of these things comport with the expectations that their firms will typically have for them when they return. The desire and need to raise children (which I am not in any way criticizing) begins to take hold, and many women on maternity leave start questioning the entire point of working in a law firm.

When they do go back to work, many are interested in reduced schedules, or lack the same sense of commitment, and are looking for something else. Their heart is now somewhere else and often not with their jobs: This is not true for all women, but it happens frequently enough that I mention it as a danger. Any time off of a law firm environment makes anyone start to realize that “the world” and life outside of a law firm is better than life inside of it for all, but the most motivated and committed. Law firms have seen enough women take maternity leave, and come back “half-hearted,” so it is important that when you do return you do so with a renewed sense of commitment.

As a side note, when I work with women who have successfully come back to their native law firms after maternity leave and are working reduced schedules (regardless of their qualifications), they often have an exceedingly difficult time getting new positions compared to their “all in” counterparts who are working full-time schedules.

How have you seen some attorneys change after coming back from maternity leave?

See the following articles for more information:

- **Children, Maternity Leave and Becoming a Partner; and**
- **Becoming a Mother: Continuing to Care for Your Other Baby...Your Career.**

2. Maternity Leave (Frequent).

I bring this up only because I have seen this frequently, and this does not work. One attorney I spoke with in New York successfully “gamed” the system by having five children in four years, and spent much of her first four years of practice on maternity leave—and fully paid while doing so. While this is an extreme example, law firms do not like this. It does not do a lot to show your commitment to learning the practice of law and supporting the firm and so forth. When this woman finally lost her job, and I spoke with her, she had become somewhat legendary in the New York legal community already because word got around. Obviously, if you have children very frequently, it is going to be difficult for you to return to your firm.

3. Maternity Leave (Long-Term).

If an attorney takes more than the recommended amount of maternity leave and has extended this so long that she is no longer an employee of the law firm, she will have a difficult time returning to her firm. While many law firms allow this, and accommodate it, usually where I have seen this, the law firm will often say something to the effect of “*we do not have any openings*” right now when the attorney tries to return. They may allow you to return if your work has been exceptional, but it is more likely than not that they will not.

4. Paternity Leave.

Paternity leave has become a touchy subject. Most law firms now offer some paternity leave. Nevertheless, how they treat attorneys who take paternity leave is a different matter entirely. Over the past few years, I have spoken with a variety of attorneys who took paternity leave. When they came back, they found that there was no work available for them. They also started getting poor reviews even though they had received excellent reviews, and had plenty of work before taking paternity leave. I have seen several men destroy their careers by taking paternity leave. It is not the best idea, unless you see it working for others in your law firm. Paternity leave is sort of like a law firm offering you four weeks of paid vacation each year: It is there, but you use it at your peril.

Have you seen an attorney take their full paternity leave? What happened when they came back?

5. Illness (Own).

Attorneys get sick all the time, of course, and getting sick is part of life. But when a sickness starts turning from weeks into months, things often begin to change for the attorney when he/she finally returns to work. I do not like this, but I frequently see that when attorneys return after being sick for some time that the law firms they return to no longer treat them the same.

I have spoken with several attorneys over the past year who got autoimmune illnesses while working in large New York law firms. Each of them left their firms to deal with their illnesses for several months and then all returned. When each of them returned, they found less work and started getting very poor reviews. One was told by her “mentor” that getting sick “damaged her brand,” and she should try and find another law firm to work in. She was so upset by this that she left.

I am not going to tell you my feelings about this—they are not positive. Incredibly, in most instances, the attorneys worked so hard that this is likely what caused the illness in the first place. Yet, when they recovered and wanted to come back, they were treated poorly and cast away like damaged goods. If there is any moral to the story, I guess it is not to get sick, or to pick a firm from the get-go that has a more compassionate approach to these types of situations.

6. Illness of Someone Close to You.

Many attorneys leave firms to take care of people in their families who get sick—a spouse, parent, or someone else close to them. Incredibly, law firms seem to frown on this as well. I have several candidates who took several months off to care for someone dying (who ultimately died), and came back to their law firm’s months later and were let go.

I am just the messenger here, but if an attorney takes too much time off to care for a sick relative, the odds are they will not be welcome with open arms when they return to their law firms. I am not sure why this is, but the only advice I can give is that if you want to stay employed with your current law firm, you should take as little time off as possible.

How would your firm react if you took extended time off due to an illness of yourself or a family member?

7. Extended Vacation (Use of All Vacation Time).

Taking an extended vacation and using all your vacation time is **not** a good idea at all in most law firms. Can you do it? Sure—at some firms you might get away with it, and it can work if you bill enough hours throughout the year. In my experience, though, things rarely go well for most attorneys who take extended vacations.

In one recent instance, an attorney got a poor review and was told his work needed to improve. He then took a two-week vacation to Israel a month later. When he returned, the firm fired him (he had also taken a vacation earlier in the year). If you take too long off, and take too many vacations, the law firm will reach the conclusion that you are not committed, and will find someone who is.

See **Taking a Hiatus from Practicing Law** for more information.

B. Can You Get a Position in a Prestigious Law Firm as a Lateral If You Formerly Worked in a Prestigious Law Firm and Are Not Currently Working in a Law Firm?

Once you start practicing law with a law firm, you are expected to never stop. Attorneys not working inside of law firms are either unemployed or working in a different practice setting (like in-house, the government, public interest, or academia). Whatever the case, they are almost never welcome back in a prestigious law firm.

Here are some of the reasons why law firms look so negatively on attorneys not currently working in law firms:

- **Most law firms are “up or out,” and if you leave, you are “out.”** Law firms are competitive institutions. Law firms are most productive when associates and partners compete within their existing groups. Partners try and bill lots of hours and bring in clients. Associates try to bill lots of hours and one up each other. If someone leaves this rat race and does something else, they do so for a reason. The odds are quite certain that they will not compete at this same level if they return. Law firms want no part of it—they only want the most competitive people around.
- **A law firm’s main value in the market is the quality of its people. Without the best, most motivated people the firm has less value to its clients.** A law firm’s market differentiator is to have the best attorneys possible working for it. Law firms are considered more or less prestigious based on the quality of their attorneys. Hiring attorneys is one of the most important functions of the law firm. The commitment and quality of the attorneys it hires must be unquestioned. A law firm is not interested in an attorney who has aspects of his/her background that call into question his/her quality or commitment.
- **Law firms know that if you have left the law firm environment for any reason, you are likely to do so again.** Once an attorney leaves a law firm for a different practice setting, the odds are almost certain that he/she will do so again. The past has a strange way of repeating itself, and attorneys who go back to law firms most often do so because they must and not because they want to.
- **If you were fired or laid off, you are likely to “fire” your next employer.** Attorneys who are fired from a law firm, or laid off, are mad and want to “get back” at someone. Rather than realizing the error of their ways and reforming, these attorneys often end up getting mad at the next law firm that hires them and take revenge by “firing” the law firm by getting another job, creating issues while they are there, and leaving with bad will. Most established law firms that have hired a fired or laid off attorney have experienced this, and consequently have no interest in hiring fired or laid off attorneys.

Are the above perceptions by firms fair? Why or why not?

Here are some examples of attorneys who leave firms, and then try unsuccessfully to return later:

1. The Fired, or Laid Off Attorney.

It is extremely difficult—and often impossible—for attorneys who are laid off or fired to get another position with a prestigious law firm. Rightly or wrongly, law firms believe that if an attorney is laid off or fired, the attorney was not providing the law firm enough value to be worth keeping around.

When an attorney is laid off, this means that there was not a strong enough case to be made for keeping the attorney around. Either the attorney was not motivated enough, did not aggressively seek out work enough, did not get partners in his/her corner—or otherwise. Once a law firm lays off an attorney, it becomes very difficult for the attorney to get another job. The perception is that the attorney must have done something wrong (even if the attorney did not). Rather than risk it, the law firm generally will prefer to hire someone who is already employed.

An additional fact about laid off attorneys is that law firms that hire them often get burned, and the attorney has problems when they get there. The law firm quickly finds out why the attorney was laid off from the attorney's last law firm. Also, laid off attorneys often become very defensive in their new positions, and many law firms believe they are difficult to work with.

If you were fired, note that law firms do not care why you were fired; just getting fired is enough for them. Since firing an attorney is such a serious thing, law firms will not do this unless there are serious problems with the attorney. Attorneys might be fired for various reasons, such as extreme incompetence, not working hard, or being perceived as not being on the same team as the people they are working for. Regardless of why the attorney is fired, most law firms will pass over that attorney and instead hire an attorney who is currently employed. The perception is that there are fit for the practice of law inside of a law firm, and there are those who are not.

Have you ever been fired or laid off from a law firm? How did this affect your career?

See the following articles for more information:

- **How to Handle a Big Law Layoff;**
- **What to Tell Your Recruiter after You've Been Laid Off;**
- **How to Address Your Layoff in Cover Letters and Interviews;**
- **Recently Laid-off Associate Unsure How to Handle Job Status in Interviews;**
- **Associate about to Be Let Go Unsure How to Handle Reason for Leaving in Interviews; and**
- **Is Telling a Headhunter That You Are About to Be Laid-off a Good Move?**

2. The Voluntarily Unemployed Attorney.

Attorneys may leave their positions voluntarily, and often do. Attorneys who leave voluntarily are shunned in the lateral law firm market as well. The attorney may justify moving based on notions such as that the work environment was toxic, that they wanted to think about their options, and otherwise—but the lateral law firm will not buy it. In fact, in most instances when an attorney is voluntarily unemployed, prospective law firms will simply assume that the unemployed attorney was fired. Attorneys are expected to stay employed with their law firms, and when (and if) they leave they are not looked upon kindly. The longer the attorney is voluntarily unemployed, the worse it looks to law firms. If an attorney is voluntarily unemployed for an extended period, it becomes extremely difficult for the attorney to lateral.

The only exception to the permissibility of an attorney being voluntarily unemployed is if the attorney moved home for some reason to the city where the attorney is from, or relocated with a spouse to a different part of the country for the spouse's job. While it is never advisable to leave a firm, and do this, doing so is often not fatal to the attorney's law firm career if the attorney starts looking for a position immediately.

Have you ever left a firm voluntarily? Were you able to find a job at another firm after that?

3. The Attorney in a Different Practice Setting.

Law firms do not like hiring attorneys at the lateral level who are not coming directly from a law firm because they know the attorney will likely leave again when they have the opportunity. Attorneys who **go in-house**, take **government jobs**, go into academia and so forth are never welcome back into law firms. Most attorneys go in-house or into different practice settings because they do not like the law firm practice setting. If an attorney did not like the law firm practice setting before, the odds are good that the attorney will not like it when the attorney returns. The pace and sophistication of the work are also generally much different inside of a law firm than in other practice settings. Law firms view people who are in-house, with the government, and in academia as having become accustomed to a different pace of work. Most attorneys who return to law firms from these different practice settings never do all that well when they return, and end up leaving again.

See **Why Going In-house Is Often the Worst Decision a Good Attorney Can Ever Make** for more information.

Two exceptions to this are high-level government appointments, and federal clerkships for attorneys after a few years of practice. Attorneys who do these can often return and do.

Conclusions

I realize how depressing all this information is. A law firm is a type of "guild" with its own set of rules that are often invisible and run beneath the surface of every law firm out there. As someone who is delivering the message of what I have seen in the market, I understand how bleak all of this looks. The good news is that if an attorney looks hard, wide, and far enough, the attorney generally will find a good law firm interested in him/her. I almost always get interviews for attorneys in all the above situations. When you are in this sort of situation, though, you need to "turn it on" in your interviews and sell like crazy to get your next job. You need to make the law firm believe that you are solid, committed, well balanced, and everything the law firm needs and requires. If anything, you should use your time off to get clear about how much you want to work in a law firm and commit to it if this is really what you want to do. If you do this, then it will come across to firms, and you will succeed.

About the Author



A. Harrison Barnes is the founder and CEO of [The Employment Research Institute \(ERI\)](#), a company of more than 150 job search websites, recruiting firms, online employment news magazines and various job search companies. The ERI employs several hundred people, and is headquartered in Pasadena, California.

In 2000, Harrison started the legal recruiting firm [BCG Attorney Search](#); in 2001, he started [Legal Authority](#); and in 2003, he started [LawCrossing.com](#), a job board that aimed to consolidate every legal job that exists. Since being launched, LawCrossing has experienced great success and has been on the Inc. 500 twice.

Following the success of [LawCrossing](#), the company soon broadened its range to include the 150+ [EmploymentCrossing.com](#) websites, each of which is specific to a particular industry or field of interest. These websites started with the launch of [SellingCrossing](#) in 2007.

In addition to running many job search websites, one of Harrison's umbrella companies, [EmploymentResearchInstitute.com](#), branched into legal staffing with the temporary staffing firm [Law Firm Staff](#) in 2002. In 2005 the Employment Research Institute

branched into student loans with the success of [EdFed](#), [Law School Loans](#), [Graduate School Loans](#), [Medical School Loans](#), and [Dental School Loans](#). In the 2006 calendar year, [EdFed](#) became a federally recognized student loan lender, and was among the top 15 student loan companies in the United States based on its volume of student loan consolidations.

ERI also offers résumé development and distribution services through the companies [EmploymentAuthority.com](#), [Attorney Résumé](#), and [Preferred Résumés](#).

In 2012 Harrison joined Business Breakthroughs International (BBI) as Chief Technology Officer. BBI is a business consulting and strategy firm founded by Tony Robbins and Chet Holmes, two of the most influential business coaches in the world. BBI offers a full range of business services for owners and executives at every level.

In 2014 Harrison launched [Law.net](#), a comprehensive directory of attorneys across the United States.

Harrison also writes daily articles to inspire and motivate job seekers that he publishes and emails out to over 500,000 individual subscribers each week, [HarrisonBarnes.com](#).

Harrison began his career as a litigation attorney, after attending the University of Virginia Law School (UVLS). At UVLS, he was an editor of the Virginia Law Review and the Managing Editor of the Journal of Law and Politics. Harrison is also an honors graduate of the University of Chicago, where he received his bachelor's in public policy studies and was nominated for a Rhodes Scholarship. Harrison has worked for the United States Department of Justice, a federal district judge for a one year clerkship, and as an attorney for the law firms Quinn Emanuel Urquhart Oliver & Hedges, and Dewey Ballantine (now Dewey Leboeuf). Harrison also taught at Whittier Law School when he practiced law.



PERSONAL FINANCE – TAXES

Are You Prepared for Tax Season?

February 1, 2017 – Tax season is here, and it is time to make your final filing preparations for 2016, and look ahead to your 2017 taxes. If you have been managing your taxes as a year-round process, preparing your return should be easier. If you have not, do not panic. There is still time to get your finances in order ahead of the filing deadline (April 17, 2017)—and be better prepared for next year.

Consider these five tax tips to help make tax time a little easier.

1. Plan ahead.

While you are focused on the 2016 tax year filing, remember that effective tax planning requires a year-round approach. The return you are preparing is a good starting point for the changes you can make in 2017 and beyond. And with the 2017 tax year already underway, the sooner you can identify and make those changes, the better.

Here are a few things to consider:

- **Check your withholdings** and quarterly estimated tax payments to ensure you are not paying too much or too little.
- **Consider making contributions** to your IRA as early in the year as possible. It is always a good idea to put your money to work sooner rather than later.
- **Monitor any changes** to your marginal income tax bracket for 2017. Knowing your projected marginal income tax bracket can help inform your investment decisions—for instance, whether municipal or taxable bonds make sense in taxable accounts, which assets go best in taxable v. tax-advantaged accounts, or how much benefit you might receive from harvesting capital losses.
- **Investigate ways to reduce your tax burden.** Are you contributing enough to get the maximum tax benefit from your 401(k)? Does it make sense to defer income or accelerate

deductions? Should you consider increasing your charitable contributions to reduce future tax burdens?

2. Understand your taxable income.

Be sure you understand the different types of income, credits, and deductions that apply to you:

- **Ordinary income** includes wages, interest, nonqualified dividends, income from self-employment and so forth.
- **Capital gains** include income from selling assets such as stocks, bonds, real estate, etc.
- **Passive income** includes income from rental real estate, limited partnerships or business activities in which your participation is immaterial.

Each category has additional classifications. For example, the Internal Revenue Service (IRS) makes a distinction between short- and long-term investments when taxing capital gains. Gains on short-term investments—those held for a year or less—are subject to ordinary income tax, which for people in the top federal income bracket could mean a rate of up to 39.6 percent (43.4 percent when the net investment income surtax is added). Gains on long-term investments—those held for more than a year—are taxed at 15 percent for most taxpayers (those in the highest income bracket are taxed at 23.8 percent). Do not forget to factor in state and local taxes as well, if applicable.

Some dividends are “qualified,” which means they are treated as long-term capital gains. Dividends that are not qualified are treated as regular income. And although most interest income is taxable, interest income from state and local municipal bonds is considered tax exempt.

In addition, the different types of income may be subject to special rules. For example, passive losses typically offset passive income, but not ordinary income. Capital losses can offset capital gains, but individuals and married couples filing jointly can also deduct up to \$3,000 of any excess capital losses from their ordinary income (or \$1,500 if married and filing separately) each year. Carryover rules also allow you to save unused passive and capital losses for use in future years.

3. Know your costs before you sell.

When it comes time to calculate any taxable capital gains on your investments, you subtract the sale price from your cost basis, or the price you paid. That may sound simple, but because many investors buy into the same investment at different prices over time, calculating cost basis can be complicated. There are different accounting methods for calculating cost basis, and which one you use can impact your tax bill.

For individual stocks and bonds, there are two options:

- **First in, first out (FIFO)** is the IRS’ default method if you do not specify otherwise. For a partial sale of your stock or bond holdings, the IRS assumes you are selling your oldest holdings first. That could mean a larger capital gain if the oldest shares have appreciated more than those acquired later.
- **Specific identification** allows you to choose which investments you are selling at the time of the sale. This method is more flexible than FIFO, and can help you minimize taxes on a sale. For example, you could choose to sell those shares that would result in the smallest taxable gains. Remember, if you use this method, your broker must confirm your choice in writing within a reasonable period.

You should notify your broker of your method of choice. Brokers are required to report the cost basis on equities acquired after January 1, 2011, and mutual funds and exchange-traded funds (ETFs) acquired after January 1, 2012. Brokers are also required to report the cost basis for most bonds and some options securities purchased after January 1, 2014.

For mutual fund shares, you can use FIFO or specific identification, or a method called “average cost single category.” Under this method, you total the cost basis of your entire position before your first sale and divide it by the number of shares you own. This determines your average cost per share. As with FIFO, the oldest shares are sold first. Most brokers and mutual fund companies keep a running calculation of the average cost basis for you, and typically include reinvestments.

4. Invest tax-efficiently.

Do your investment plans make the most efficient use of your taxable and tax-advantaged investment accounts? For example, it makes sense to hold long-term investments in a taxable account because any gains will be taxed at the lower capital gains rate. The same is true for tax-efficient investments such as stocks or funds that pay qualified dividends, municipal bonds, and most index funds and ETFs.

On the other hand, you are better off holding short-term investments in tax-advantaged accounts—such as 401(k)s, traditional IRAs and deferred annuities. Remember, gains on short-term investments are taxed as ordinary income, which is subject to a higher tax rate than capital gains. The same is true for actively managed mutual funds that may generate significant short-term capital gains, taxable or high-yield bond funds, and real estate investment trusts (REITs).

Qualified withdrawals from Roth IRAs and Roth 401(k)s are tax-free, so it usually makes sense to use these accounts for assets that you expect will appreciate the most. Of course, tax-efficient placement presumes you have different account types. The overall asset allocation decision comes first. If most or all your portfolio is in tax-deferred accounts, then just focus on the asset allocation.

5. Mind the deadlines.

The tax-filing deadline is not the only one that matters. Make sure you know the deadlines for your retirement plan contributions, estimated tax payments, and required minimum distributions (RMDs). Here are a few to keep in mind:

- If you turned 70½ in 2016, you have until **April 1, 2017**, to take your first RMD. Remember, even if you opted to delay taking your first RMD until April, you will still need to take your next distribution for 2017 by December 31. Taking two distributions in one year could potentially increase your taxable income for the year.
- You can make 2016 contributions to your traditional or Roth IRA until **April 18, 2017**. (**April 15 falls on a Saturday this year, and April 17 is a holiday.**)
- If you file for an extension, your tax-filing deadline is **October 16, 2017**, but you still must pay your taxes by April 18.

Mark all the important deadlines on your calendar. You may find it helpful to map out different stages of your tax preparation to avoid a last-minute crunch at the filing deadline. Be sure to save your receipts, and keep your records organized.

What you can do next:

- Get help if you need it. Not everyone requires a tax preparer, but consulting a professional can be well worth it—especially as tax rules become more complex.



About the Author

Rande Spiegelman specializes in comprehensive personal financial planning advice, including goal planning and investment analysis, retirement, education, net worth and cash flow, individual income tax, equity compensation, gift and estate, and risk planning. Mr. Spiegelman has been widely quoted in The Wall Street Journal, Investor's Business Daily, Forbes, Fortune, Smart Money, Kiplinger's, The New York Times, The Los Angeles Times, U.S. News & World Report, USA Today, CBS Marketwatch, The Street.com, and many others.

Rande Spiegelman,
CPA, CFP®, Vice
President of Financial
Planning, Schwab Center
for Financial Research

Prior to joining Schwab, Mr. Spiegelman was a senior manager in the personal financial planning practice of a major accounting firm, where he provided investment counseling and financial planning advice to individuals, groups, and institutions. He earned his Bachelor of Science degree in Accounting from San Francisco State University, magna cum laude, and is a member of the American Institute of Certified Public Accountants and the California Society of CPAs.



*For recent court updates, please visit our website at <http://www.sflpa.org>.
Thank you for your continuing support of our local association.*



Support our Scholarship Program



SFLPA has organized a fundraiser to help support our scholarship program. The SFLPA scholarships are being offered to high school seniors, college students, and career change/re-entry students looking to pursue a career in the legal field. The money raised will be awarded to students to help pay for tuition, books and other college expenses.

You can help ensure our program's success by participating in this fundraiser and spreading the word to your colleagues and friends. Buy a tote-ally cool (and functional) tote today and flaunt your support!

Aubrey Miller
SFLPA Scholarship Chair



Please click on the link below to purchase a tote bag.

https://www.booster.com/sflpa-scholarship-fundraiser?ref=CRM_Trigger_Organizer_PurchaseConfirm&utm_source=CRM_trigger&utm_medium=email&utm_campaign=CRM_Trigger_Organizer_PurchaseConfirm

SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION

CHAPTER ACHIEVEMENTS

(Please submit this form each month.)

Month: February 2017

Your Name: _____ Position held, if any: _____

	Category - Description	
1.	ATTENDANCE - LSI Conference (<i>Circle all that apply</i>) <div style="display: flex; justify-content: space-around;"> Quarterly Annual </div>	_____
2.	BENEFITS - Belong through LSI sponsored (<i>Circle all that apply</i>) Credit Union Insurance Hertz Retirement Plans	_____ _____ _____ _____
3.	CALIFORNIA CERTIFIED LEGAL SECRETARY (CCLS) (<i>Circle all that apply</i>) Participated in a CCLS Study Group Participated in a CCLS Mini Mock Exam Took CCLS Exam Passed CCLS Exam Submitted questions to Continuing Education Council Recertification	_____ _____ _____ _____ _____ _____
4.	COMMUNITY/CHARITABLE PROJECTS (<i>Circle all that apply</i>) Volunteer/help at Legal Aid and/or charitable organizations in the community	_____
5.	INTERCLUB Attend another association's meeting, installation, or other function Attend Local Bar Association's meeting	_____ _____
6.	EDUCATION Attend seminar/workshop sponsored by SFLPA Attend seminar/workshop sponsored by other association Attend seminar/workshop sponsored by a Forum, CEB or Rutter (<i>Check all that apply</i>)	_____ _____ _____
7.	LEGAL SPECIALIZATION SECTIONS Enrolled in at least one section Enrolled in all six sections Attend a Legal Specialization Section meeting at LSI Conference Attend Legal Specialization Section Regional Seminar Submit article for use in Legal Specialization Section Newsletter	_____ _____ _____ _____ _____
8.	PUBLICATIONS Purchased LSI Legal Professional's Handbook Purchased Updates to LSI Legal Professional's Handbook Purchased Law Office Procedures Manual Purchased Updates to Law Office Procedures Manual	_____ _____ _____ _____

Please return completed form to the Chapter Achievement Chairperson or the Governor. Thank You.

Upcoming Events

San Francisco Legal Professionals Association

Celebrating 80 Years of Excellence



February 2017 – Brown Bag Presentation

Criminal Law
**“Propositions 57 & 62 – The Impact of the New Laws on
Marijuana & Early Release from Prison”**

Presented by: Betsy Wolkin, Esq.
of the Bar Association of San Francisco

Tuesday, February 28, 2017
12:30 – 1:30 p.m.
Altshuler Berzon, LLP
177 Post Street, Suite 300, San Francisco, CA 94101

RSVP to: Sally Mendez Arevalo – smendez@altshulerberzon.com
by: Friday, February 24, 2017

One Hour MCLE Credit &
CCLS Continuous Education Certificates Available

This event is open to anyone in the legal industry. Feel free to share with your colleagues and friends. Attendees are encouraged to bring your lunch and enjoy the presentation.

About the Speaker:

Ms. Wolkin has been a practicing criminal defense attorney for 36 years – 28 of those years in private practice in the Bay Area. I have also been working part-time at the Bar Association of San Francisco as an administrator of the Indigent Defense Program.

This program is funded by CCSF under the auspices of the San Francisco Superior Court and is charged with oversight of court appointed lawyers for indigent adults and juveniles in San Francisco. I am a member BASF's Criminal Justice Task Force, California Attorney's for Criminal Justice and the California Public Defender's Association.

The SFLPA is an accredited MCLE Provider through Legal Secretaries, Incorporated. For more information about the programs offered through the SFLPA, visit our website at: www.SFLPA.org.

San Francisco Legal Professionals Association

Celebrating 80 Years of Excellence



Probate Law: Wills & Trusts

**Educational Seminar
Presented by Faye Lee, Esq.
Law Offices of Bresler & Lee**

Thursday, March 2, 2017

6:00 – 7:00 p.m.

**Young's Café, 601 Kearney Street (between Kearney & Sacramento)
\$15 per person includes Dinner (Menu provided below)**

Mail Payment to:
SFLPA, PO Box 2582, San Francisco, CA 94126-2582
Attention: 3/2/17 Probate Seminar

RSVP to: Larry McGrew – lmcgrew@firstlegalnetwork.com
by: Tuesday, February 28, 2017

Dinner Menu: Seafood Soup, Honey Walnut Prawns, Sautéed Scallops, Crab with Ginger & Green Onion, Young's Chicken, Salt & Pepper Halibut, Beef Steak with US Soy Sauce, Mushroom with Vegetables and Tea)

About the Speaker:

Faye Lee, Esq. began her career in the field of law as a legal secretary in 1970 for a solo practitioner for 16 years. She was certified as a PLS and CCLS, served as President of the San Francisco Legal Secretaries Association in 1982 and prepared over 20 history books for the SFLPA, 5 for LSI and two for NALS. When her principal attorney retired, she worked full-time for Neyhart, Anderson, Reilly & Freitas while earning her law degree from San Francisco Law School. Ms. Lee and her husband, Peter H. Bresler, a litigation attorney established the Law Offices of Bresler & Lee. They have been practicing together for 22 years handling estate planning, probate and trust administration and will contest matters.

Faye is licensed to practice in the California Supreme Court, the U.S. District Court, the U.S. Court of Appeals, Ninth Circuit Court of Appeals, and the U.S. Tax Court. She is a member of the American Bar Association, Bar Association of San Francisco, and the State Bar of California's Estate Planning, Probate and Tax Section.

One Hour of MCLE Credit & CCLS Continuous Education Certificates Available. The SFLPA is an accredited MCLE Provider through Legal Secretaries, Incorporated. For more information about the programs offered through the SFLPA, visit our website at: www.SFLPA.org.

ALAMEDA COUNTY LEGAL SECRETARIES ASSOCIATION

A Member of Legal Secretaries, Incorporated

Asset Protection and Elder Law

Speaker: **Michael Young**
Walnut Creek Elder Law

One of the biggest fears that many people have is fear of having their life savings wiped out if they need long term care. What a shame to see someone's life savings wiped out by the cost of care! Whether you or a family member is in crisis or not, it is important that you understand what you can do to protect your hard-earned assets.

Here's just some of what you'll discover:

- How to avoid having your life savings wiped out by the cost of care as you get older.
- How the law restricts protection of assets and the steps you should take now to protect your loved ones.
- The asset protection language that most people don't have in their estate planning documents, which can help to protect their life savings.
- Veterans' benefits that most people know nothing about.
- How Medi-Cal works and the steps you need to take now to protect your family under the new rules.

Date & Time

Tues., March 7, 2017
6:00 p.m.

Location

Buttercup Grill
229 Broadway, Oakland

Entrée Options:

- 1) **Cobb Salad** - Iceberg lettuce, turkey, ham, tomatoes, avocado, bacon, crumbled blue cheese, red onion and chopped eggs.
- 2) **Hickory Cheddar Burger** - Our charbroiled half pound patty smothered in our original homemade BBQ sauce and topped with our hickory smoked bacon and cheddar cheese.
- 3) **Gardenburger** - Served on a whole wheat bun with lettuce, tomatoes, red onion and a side of fresh fruit. Calories 390.
- 4) **BBQ Baby Back Ribs** - A half slab of tender juicy pork ribs cooked with our own house made barbecue sauce. Served with curly fries and black bean chili.

All entrees are served with bread/butter, soft drink, iced tea or coffee, and dessert

COST

\$25 per person

PLEASE NOTE: 24-hr cancellation required to avoid being charged for meals.
No-shows will be charged for their meal. Please make checks payable to "ACLSA".
Credit cards by Venmo – Lydia-Smith-18

RESERVATIONS REQUIRED

Please submit your reservation and dinner choice to

Cyndee Saucedo as soon as possible,

RSVP Deadline: No later than Friday, March 3rd at csauceda@meyersnave.com

ACLSA, a local association of Legal Secretaries Incorporated, an approved provider, certifies that this activity has been approved for minimum of .75 hr. of MCLE and CCLS continuing legal education.



Santa Clara County Legal Professionals Association

March 2017 Dinner Meeting



“A Day in the Life of a Court Public Information Officer”

Guest Speaker:
Joe Macaluso
Public Information Officer,
Santa Clara County Superior Court

Public Information Officers for the courts have a variety of job duties, including serving as a liaison between the court and the public. They issue press releases and answer questions from the media. This program will feature Mr. Macaluso's “war stories from the trenches” that you will not want to miss!

Register and pay via PayPal* on our “Upcoming Events” page at <http://www.sccolpa.org>. Or RSVP via email at reservations.sccolpa@gmail.com. **NOTE:** Please put SCCoLPA Reservation in the title of your email. Make checks payable to “SCCoLPA.” Cash or checks accepted at the door.

No refunds if reservation is canceled within 24 hours of the event. *\$3 convenience fee added for PayPal/credit card payments



Tuesday, March 14, 2017

TIME

Social Hour: 6:00 p.m.
Dinner/Program: 6:30 p.m.



Flames Eatery & Bar
88 S. Fourth Street, San Jose, CA 95113
408-971-1960 • validated parking at the 4th Street parking garage.

COST

\$35.00 (dinner, dessert & CCLS credit)
\$20.00 (CCLS credit; no dinner)
Free (no dinner or CCLS credit)



This activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 0.75 hours, of which 0.00 hours will apply to legal ethics, law practice management, prevention, detection, and treatment of substance abuse and emotional distress, or elimination of bias. SCCoLPA certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing minimum continuing legal education. CCLS credit will be offered in the amount of 0.75 hours.

UPCOMING EVENTS

January 12, 2017	Beginning Civil Litigation 8-Week Training Course Commences
January 21, 2017	SCCoLPA Quarterly Workshop: “Ethics for Everyone – The Basics & Beyond”
February 11, 2017	7th Annual Crab Feed, Quinlan Community Center, Cupertino

8th ANNUAL TRIVIA THROW DOWN

WHEN

**Saturday, March 25, 2017
11 a.m. – 3 p.m.**

WHERE

Offices of Nixon Peabody

One Embarcadero Center, 18th Floor, San Francisco, CA 94111

The venue is within walking distance from the Embarcadero BART Station. Parking is available within the Embarcadero Center Business Park.

Join us for the battle of the Bay Area chapters for the title of the 2017 Legal Trivia Champions!!



INVITATION IS OPEN TO ALL BAY AREA ASSOCIATIONS:

- **Alameda County LSA** • **Contra Costa County LPA**
- **Mt. Diablo LPA** • **Santa Clara County LPA**
- **San Mateo County LPA**

Hosted by: San Francisco LPA

**Please RSVP by Friday, March 17, 2017 to:
lmcgrew@firstlegalnetwork.com**



TEAM CHALLENGE

Bring your colleagues and friends to form a team of 3 or more to join in on the fun.

PRIZES AVAILABLE

**To the winning team.
Compliments of:
First Legal**

BRUNCH BUFFET

\$25 Per Person

includes:

Farmer's Breakfast, Fruit, Pastries, Coffee, Juice and Water.

ADULT BEVERAGES

**Featuring a Bloody Mary & Mimosa Station –
Guest Bartender:
Diane Mecca**

80 Years of Excellence

Save THE *Date*

4/22/2017

SFLPA 80TH ANNIVERSARY CELEBRATION EVENT

6 PM - SAN FRANCISCO, CA

GreetingsIsland.com

We are proud to announce the date of our 80th Anniversary Celebration. Stay tuned for more information in the near future. We hope that you can celebrate this milestone event with us.

INDISPENSABLE



LEGAL PROFESSIONAL'S HANDBOOK

...THE ULTIMATE RESOURCE GUIDE!

Busy lawyers rely on their staff to handle many details of their practice. They look to you, as a professional, to know what to do, and when and how to do it. The *Legal Professional's Handbook* provides you with the answers ...just as it has for over 75 years! Each chapter contains detailed practice forms and step-by-step instructions covering every major area of California law practice. The Handbook is an invaluable resource to add to your entire reference library!

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Nonmembers Price.....\$390

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...THE IDEAL TRAINING MANUAL FOR NEW STAFF!

This Manual contains detailed practice forms for every major area of law practice, along with step-by-step instructions for completing them. This is a "must-have" forms guide for legal secretaries, paralegals and new lawyers; and it's a great resource for training your office staff. In fact, the Manual is frequently used in schools, workshops and legal secretaries classes. You'll also find handy miscellaneous aids, such as procedural checklists and guidelines, tips on transcription and proofreading, law office abbreviations and legal terminology, and a list of useful reference books.

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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 TEN GREAT REASONS WHY YOU SHOULD BECOME A SECTION MEMBER:

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

For more information, contact Dawn R. Forgeur, CCLS, Legal Specialization Sections Coordinator, 500 Capitol Mall, Suite 1600, Sacramento, CA 95814, email: drforgeur@stoel.com



LSI

Educating California's
Legal Support Professionals

LEGAL SPECIALIZATION SECTIONS

2015-2016 MEMBERSHIP APPLICATION AND ANNUAL RENEWAL FORM

August 1, 2015 – July 31, 2016

Membership includes access to free quarterly workshops at LSI conferences for those sections you are a member of; quarterly newsletters that include changes to the law and forms; discounted LSS webinars; statewide roster of all LSS members in each section for easy access to local procedural information in other counties; and networking opportunities.

	✓	LSI Member New/Renewal	Non-LSI Member New/Renewal
I would like to join all six sections!	<input type="checkbox"/>	\$75	\$150
Civil Litigation	<input type="checkbox"/>	\$20	\$40
Criminal Law	<input type="checkbox"/>	\$20	\$40
Family Law	<input type="checkbox"/>	\$20	\$40
Law Office Administration	<input type="checkbox"/>	\$20	\$40
Probate/Estate Planning	<input type="checkbox"/>	\$20	\$40
Transactional Law	<input type="checkbox"/>	\$20	\$40
Total:			

Name: _____ ☐ CCLS ☐ PLS ☐ CLA ☐ Paralegal

E-Mail Address: _____

[Please note that newsletters, rosters, and other communications will be sent via email unless regular mail is requested.]

This information will be listed in the roster that is distributed to all LSS members.

Firm/Business Name: _____

Address: _____

Local Association or Member at Large: _____

Phone: _____ *I prefer communication via USPS* ☐

Method of Payment: ☐ Check payable to "LSI" enclosed ☐ Pay Online at www.lsi.org via credit card or PayPal

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, \$25 PENALTY, AND THE ACTUAL COST CHARGED TO LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL CHECK.

Send to: Dawn R. Forgeur, CCLS, Legal Specialization Sections Coordinator
c/o Stoel Rives LLP
500 Capitol Mall, Ste. 1600, Sacramento, CA 95814
dawn.forgeur@stoel.com

YEARS OF LEGAL EXPERIENCE: _____

SPECIALTY: _____

FAMILIAR WITH THE COUNTIES OF (Please indicate each County, not area):

INTRODUCTION TO THE SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION ("SFLPA")

A Professional Association for Legal Secretaries and Other Law Office Professionals
(Formerly San Francisco Legal Secretaries Association ("SFLSA"))
Established 1936
Member Legal Secretaries, Incorporated,
A California Nonprofit Corporation
Established 1934

SFLPA Objectives

♦ The objectives of SFLPA are to provide its members with educational programs, personal benefits, networking and the promotion of professionalism.

Membership Information

♦ SFLSA has been in existence since 1936, and in October 2003 changed its corporate name to San Francisco Legal Professionals Association. It is a nonprofit corporation. SFLPA is one of nearly 60 local chapters affiliated with Legal Secretaries, Incorporated ("LSI"), a California nonprofit corporation.

Membership Eligibility

♦ Membership is available to anyone with a minimum of one year's experience in a law office or engaged in work of a legal nature; permanent employment in the legal field at the time of application; attendance to two SFLPA sponsored functions; and sponsorship by an active member. Associate Membership is available to individuals with less than one year's experience.

Membership Benefits

- ♦ CLE-Approved Educational Programs each month
- ♦ Multi-Week Legal Secretaries Training Course
- ♦ Major Medical Insurance
- ♦ Cancer and Intensive Care Policy
- ♦ Individual Retirement Account
- ♦ Network (local/statewide)
- ♦ Provident Central Credit Union
- ♦ Automatic membership with LSI
- ♦ Employment Listing Service
- ♦ Subscription to "*The Hearsay*" a monthly SFLPA newsletter
- ♦ Members are eligible to join the Provident Central Credit Union throughout California.
- ♦ LSI Legal Specialization Section:
 - ♦ Criminal Law
 - ♦ Family Law
 - ♦ Law Office Administration
 - ♦ Civil Litigation
 - ♦ Probate/Estate Planning
 - ♦ Transactional Law (Corporate/Business, Real Estate)
- ♦ Each Section includes timely newsletters, a statewide membership roster for the section, periodic regional seminars and workshops at LSI's quarterly conferences.
- ♦ Employment listing services available to members and attorneys at no charge.
- ♦ California Certified Legal Secretary ("CCLS")
 - ♦ SFLPA supports the California Certified Legal Secretary certification program. A study course is available for those who wish to sit for the one-day examination, which is given semi-annually. The CCLS examination tests California legal procedure, terminology, ethics, administrative, bookkeeping, communication, and performance skills.



San Francisco Legal Professionals Association (SFLPA)

P.O. Box 2582, San Francisco, CA 94126 www.sflpa.org

APPLICATION FOR ACTIVE MEMBERSHIP

Please fill out this application completely, sign it and give to your sponsor or mail it to the post office box listed above, along with a check for \$55.00 made payable to SFLPA. This payment covers a one-time SFLPA initiation fee and your first year* of annual membership dues for both the SFLPA and Legal Secretaries, Incorporated (LSI).** Use a copy of your completed form as a receipt if needed.

PERSONAL:	BUSINESS:
NAME: _____	Your Title: _____
Hm Address: _____	Employer: _____
City ST Zip: _____	Address: _____
Hm Ph: _____	City ST Zip: _____
Cell: _____	Email: _____
Email: _____	Wk Ph: _____ How long? _____
	Contact Preference: <input type="checkbox"/> Home <input type="checkbox"/> Business
Sponsor's Name: _____	Former Employer: _____
How did you find out about SFLPA? _____	City, State: _____
Why do you want to join SFLPA? _____	How long? _____
List any previous SFLPA & other memberships & dates: _____	Total Experience: Legal _____ Litigation: _____
	Areas of Practice: _____
	Have you completed or are you currently enrolled in an SFLPA Civil Litigation course? <input type="checkbox"/> Yes <input type="checkbox"/> No
List at least one SFLPA-Sponsored function that you attended as your pre-requisite for membership and include date(s):	1. _____ Mo. _____ Yr: _____
	2. _____ Mo. _____ Yr: _____

MEMBERSHIP OATH - BY SIGNING BELOW YOU DECLARE THAT THE INFORMATION ABOVE IS ACCURATE AND YOU SWEAR AS FOLLOWS:

IF I AM ACCEPTED AS A MEMBER, I AGREE TO BE BOUND BY THE BYLAWS AND STANDING RULES OF LEGAL SECRETARIES, INCORPORATED AND THE SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION TO WHICH I AM APPLYING 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."

APPLICANT'S SIGNATURE: _____ DATED: _____

* For fiscal year beginning the previous May 1st through April 30. Applications accepted after March 1 will have dues pro-rated.

** Accompanying membership in LSI, a California non-profit mutual benefit association, includes subscription to *The Legal Secretary* magazine published quarterly, discounted prices on LSI publications such as *The Legal Professional's Handbook* and *The Law Office Procedures Manual* and more. Visit <http://lsi.org/> for more details.

To be completed by SFLPA Officer: _____ Approved by Board on: _____ Initials: _____
Date Initiated: _____

Revised 05/2013



San Francisco Legal Professionals Association

MEMBERSHIP RENEWAL FORM

For The Fiscal Year Of May 1 Through April 30

IT'S THAT TIME AGAIN! Please fill out the renewal form below and mail a hard copy along with your check for \$45.00 made payable to SFLPA to:

SFLPA Treasurer, P.O. Box 2582, San Francisco, CA 94126

For Active Members, your annual dues consist of \$25.00 for your SFLPA annual membership renewal and \$20.00 for your Legal Secretaries, Inc. membership renewal for the fiscal year beginning May 1st of this year. Checks must be received by June 1st or members will be charged an additional \$5.00 late fee for their membership renewal.

Please:

- Complete the entire form even if your contact information has not changed over the past year. You can also fill out and print this form at www.sflpa.org.
- Do not indicate "same" or "no change" for any of your answers.
- List your name as you would like it to appear on the SFLPA Roster and on your Membership Card.
- Life Members should complete and return this form also.

MEMBER INFORMATION			
NAME:		Check as applicable: <input type="checkbox"/> CCLS <input type="checkbox"/> PLS <input type="checkbox"/> CLA	
Where do you prefer to receive postal mail?		<input type="checkbox"/> Home	<input type="checkbox"/> Work
Email?:		<input type="checkbox"/> Home	<input type="checkbox"/> Work
Please indicate your type of membership: <input type="checkbox"/> Active \$45.00 <input type="checkbox"/> Associate \$25.00 <input type="checkbox"/> Life \$500.00 <input type="checkbox"/> Honorary (Board Approved)			
DATE SUBMITTED:		AMOUNT ENCLOSED: \$	
E-Mail Addresses:		(Office)	(Home - optional)
BUSINESS			
Employer:		Title:	
Areas of Practice:			
Office Address:			
City:		State:	ZIP Code:
Phone:	Is this information different from last year?		<input type="checkbox"/> Yes <input type="checkbox"/> No
PERSONAL			
Home Address or P.O. Box:			
City:		State:	ZIP Code:
Telephone Numbers		Home:	Cell:
Is this information different from last year?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
OTHER			
Would you consider becoming a committee member?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, list committees you would be interested in serving:			

Note: Your contact information above will not be distributed outside SFLPA without your consent. Upon receipt of your complete application and your accompanying check, a current membership card will be sent to the address you listed above as your mailing reference. If you have any questions regarding your renewal of membership with the SFLPA, please contact any of the current officers listed on our website at www.sflpa.org. Thank you for your continued support as a member of the San Francisco Legal Professionals Association.

Revised 05/2013



CHANGE OF ADDRESS FORM

Member Name _____

New Address _____ City _____ State _____ Zip _____

New Home Telephone

New Office Telephone

New Personal Email Address

New Work E-Mail Address

New Employer Name _____

New Address _____ City _____ State _____ Zip _____

Please indicate preferred contact method:

☐

Home

☐

Work

YOUR SPECIALTY:

- ☐ Administrative
- ☐ Appeal
- ☐ Arbitration
- ☐ Business/Corporate
- ☐ Probate/Estate
- ☐ Taxation

- ☐ Criminal
- ☐ Family
- ☐ Law Office Management
- ☐ Litigation
- ☐ Real Estate
- ☐ Other (Specify):

Please submit to:

SFLPA

P.O. Box 2582

San Francisco, CA 94126-2582

Member Benefits

Advantages of Membership

LSI® provides educational, professional, and personal development information to legal support staff throughout the state of California. Many educational opportunities are available to members (and non-members, for a nominal fee) throughout California.

- Monthly educational programs and newsletters are provided by local associations
- General educational programs are offered at each LSI conference free to anyone wishing to attend. Topics vary among specialized areas of law, ethics, law office products and management, and personal development. Click on LSI Events for more information about upcoming LSI Events.
- Members (and non-members) are given the opportunity to join one or all six Legal Specialization Sections. Each specialization section offers seminars and newsletters on specific areas of law. Seminars are presented at each LSI quarterly and annual conference free to LSI section members and at a reduced cost to non-section members. For more information, click on “Legal Specialization Sections.”
- Many local associations offer study groups for members interested in preparing to take the California Certified Legal Secretary (CCLS®) examination. Information on the CCLS examination can be found by clicking on “California Certified Legal Secretary.”

These programs are designed to provide current material and educational tools to enable law office support staff to remain current with the changes in general law, as well as in their respective areas of practice.

MAKE A CAREER CHOICE – BECOME A LEGAL PROFESSIONAL

Why Become a Legal Professional?

- Competitive salaries and benefits
- Knowledge and skills allow the freedom to work anywhere
- Competent legal professionals are well respected in the legal community
- Legal professionals fulfill a vital and meaningful role for law firms and attorneys
- Continuing education enhances legal professionals, making them an asset to every employer

Why Join Legal Secretaries, Incorporated?

- Become one of the 2000 elite legal professionals in California
- Build a network of knowledge by meeting other legal professionals
- Continuing education is the main focus of Legal Secretaries, Incorporated
- Our motto: Excellence through Education
- Expand your personal and professional development and skills through a multitude of educational opportunities offered statewide
- Enjoy discounted educational benefits through the Continuing Education of the Bar
- Become a California Certified Legal Secretary (CCLS®) through a course of study and a comprehensive examination
- Easily maintain your CCLS credits and your MCLE credits through workshops and seminars sponsored by the Legal Specialization Sections of Legal Secretaries, Incorporated

How You Can Become a Legal Professional:

- Learn basic secretarial and computer skills
- Enroll in a legal secretarial or paralegal course through business schools and college courses
- Enroll in a training course offered by a Legal Secretaries, Incorporated, association in your area
- Legal Secretaries, Incorporated, offers scholarships to non-members interested in pursuing a career in the legal field

Discounts for LSI Members

In addition to the many educational and networking opportunities, LSI members may receive discounts for certain educational seminars and publications offered through Continuing Education of the Bar (CEB). Agents for insurance and financial providers are available as resources when members inquire about benefits in an effort to obtain the best coverage for each member’s individual needs and location. Access to credit unions and rental cars are also available.

LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

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's individual needs and location. For information call these representatives directly.

<p>WORKING ADVANTAGE Toll Free: (800) 565-3712 www.workingadvantage.com 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, lsiorg@suddenlink.com, or LSI Vice President</p>	<p>HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com</p>
<p>FINANCIAL PROVIDERS</p>	
<p>CAPITAL INVESTMENT ADVISERS Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 www.ciadvisers.com Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>	<p>LEGACY WEALTH MANAGEMENT Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz Offering discounted John Hancock Long Term Care Insurance and Life Insurance, Annuities, Retirement, Investment and Estate Planning, Mutual Funds, and 401K</p>
<p>DAVID WHITE & ASSOCIATES Wealth Accumulation and Preservation 3150 Crow Canyon Place, Suite 2000 San Ramon, CA 94583 (800) 548-2671 Contact: Ryan Gonzales (ext. 2682), rgonzales@dwassociates.com, or Matt Kay (ext. 2628), mkay@dwassociates.com Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance</p>	<p>ATHLETES BUSINESS CONSULTANTS Jory Wolf, President/Founder 350 10TH Avenue, Suite 1000 San Diego, CA 92101 Office: (858)886-9842 Cell: (510)919-9062 jory@athletesbiz.com California Insurance License: 0E88330 10% discount on Long Term Care, call for information on life, long term, and disability insurance, as well as commercial and residential lending</p>
<p>CREDIT UNIONS</p>	
<p>LA FINANCIAL FEDERAL CREDIT UNION P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p>PROVIDENT CREDIT UNION 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 www.providentcu.org All LSI members are eligible to join.</p>

QUESTIONS AND CONCERNS CONTACT:

Jennifer L. Page, CCLS, LSI Vice President
LSI Marketing Committee Coordinator
PO Box 150427, San Rafael, CA 94915
Home - (415) 989-1010
Cell - (415) 710-3402
jlpage@ix.netcom.com

Revised 6/12/2014

Editor's Message

By: Sally Mendez Arevalo



Dear SFLPA Family and Friends,

Hard to imagine that we are almost at the end of February. We truly apologize for the delay in distributing the newsletter but as you are all aware the SFLPA Board has been pretty busy planning events for the upcoming months.

We look forward to seeing you at our upcoming events!

Sally Mendez Arevalo, Editor
Judy Nakaso, Assistant Editor
HEARSAY
San Francisco Legal Professionals Association
Post Office Box 2582
San Francisco, CA 94126-2582

FIRST CLASS MAIL

LSI 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 in Memory of
Joan M. Moore, PLS, CCLS
LSI President 1980-1982