

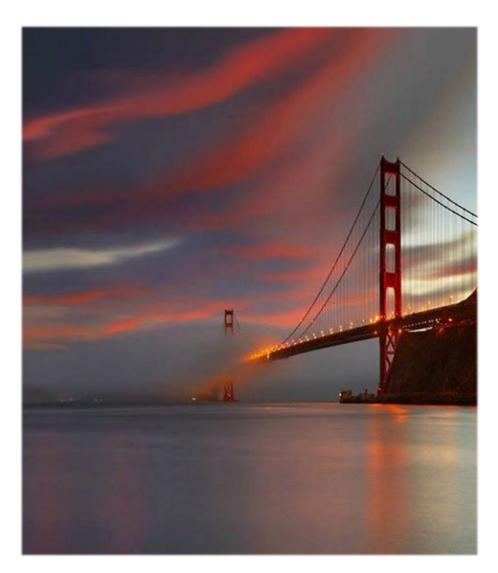


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A Monthly Publication of the San Francisco Legal Professionals Association

Creating Connections – Building Bridges... Together



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2017-2018 OFFICERS AND CHAIRPERSONS

PRESIDENT Larry McGrew First Legal Network (415) 626-3111, ext. 1201 (Office) (415) 716-6585 (Cell) Imcgrew@firstlegalnetwork.com	VICE PRESIDENT Carol E. Romo Crowell & Moring LLP (415) 365-7471 cromo@crowell.com	SECRETARY Sally Mendez Altshuler Berzon LLP (415) 421-7151 smendez@altber.com	TREASURER Scheryl Warr (415) 696-9382 Scheryl.warr86@gmail.com
GOVERNOR Christine J. Flores, CBA Orrick Herrington & Sutcliffe (415) 773-5566 (510) 388-7918 CFlores@orrick.com	WAYS AND MEANS Shannon Thompson Senior Account Executive (510) 381 -7552 Cell sthompson@kusar.com	CCLS PROGRAM	LEGAL PROCEDURES
INTERCLUB Sue Hammer First Legal Network (415) 626-3111, ext 1212 (Office) (415) 720-6229 (Cell) shammer@firstlegalsupport.com	EMPLOYMENT Suddie Scott Ogletree Deakins (415) 536-3415 sscott5204@yahoo.com	EDUCATION Francie Skaggs (925) 212-4979 (cell) francieskaggs@gmail.com	HISTORIAN Christine J. Flores, CBA Orrick Herrington & Sutcliffe (415) 773-5566 (510) 388-7918 CFlores@orrick.com
PROGRAM Terralyn Graff Barkley Court Reporters (415) 254-9935 terralyng@barkley.com	HEARSAY EDITOR Sally Mendez Altshuler Berzon LLP (415) 421-7151 smendez@altber.com	PARLIAMENTARIAN May Sene (415) 379-3692 mseneparalegal@gmail.com	PUBLIC RELATIONS
CHAPTER ACHIEVEMENT Christine J. Flores, CBA Orrick Herrington & Sutcliffe (415) 773-5566 (510) 388-7918 CFlores@orrick.com	MEMBERSHIP Carol E. Romo Crowell & Moring LLP (415) 365-7471 cromo@crowell.com Lillian Wong lwong@jonesday.com	PROFESSIONAL LIAISON/DAY IN COURT Lilian Wong Jones Day (415) 875-5884 Iwong@jonesday.com	SCHOLARSHIP/ CAREER PROMOTION
BAY AREA LEGAL FORUM (BALF) Website: www.bayarealegalforum.org Member-at-Large <i>Yvonne Waldron-Robinson,</i> <i>CCLS</i> Cooley LLP (650) 843-5743 (408) 823-3205	415-875-5884 <i>Malou Sana</i> <u>malou.sana@bryancave.com</u> 415-675-3431		WEBSITE LSI CORPORATE OFFICE (800) 281-2188
ywaldronrobinson@cooley.com SFLPA BALF Representatives			Website: <u>www.lsi.org</u>

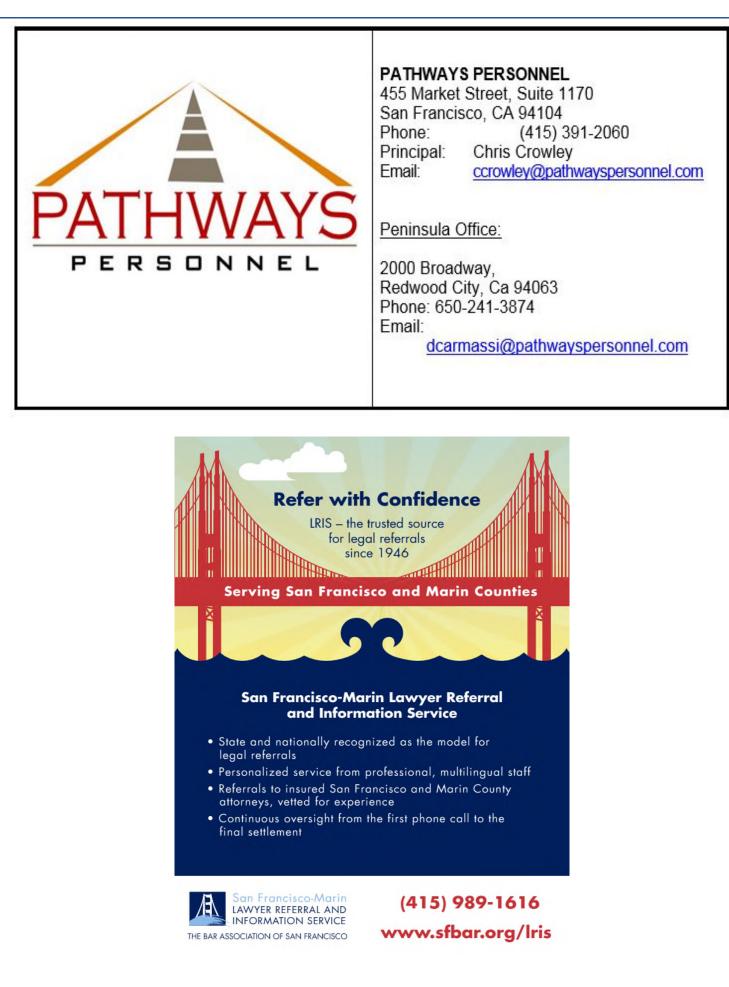


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HEARSAY

February 2018

President's Message

By: Larry McGrew





Greeting SFLPA Members and Friends,

We have sprung into March and we have been very busy which brings another meaning to the word madness. There's lots to celebrate as we come to end of the 2017-2018 fiscal year. We had high expectations. Some of the events takes lots of planning especially when it comes to following the LSI Guidelines.

I would like to acknowledge our Board of Directors and the respective Committee members for an outstanding job. We successfully accomplished many events but more importantly, there were some significant projects that were either brought back from our past, done for the first time, or scheduled in the future that will require a tremendous effort in order to succeed. Here is a recap to those events:

- Our Membership Committee hosted our first-ever SFLPA Open House, which was a huge success. The focus was introducing our programs and services to potential new members.
- Day-in-Court hosted a Mock Trial with very special guest The Honorable Carlos Bea, Justice of the Ninth Circuit Court of Appeals who acted as the presiding judge.
- We upgraded our website which allows our members to do more things online such as register for events, process payments by credit card and will allow people to apply or renew their membership online.
- Brought back the multi-week Legal Secretarial/Professional Litigation Training Program as we had 50 attendees. We received very good feedback from our co-sponsor San Francisco State University and SFSU is inquiring about our next training seminar.
- Hosted our very first Crab Feed Fundraiser and entertained 60 attendees. It was fun, the food was fantastic and everyone left satisfied.
- And finally, successfully submitted our bid to host the 2019 November Quarterly Conference at the Hilton Financial District Hotel in San Francisco.

As you can see, this is our version of completing the March Madness Brackets because when we succeed, our members succeed. The evolution of longevity is trying new things and bringing back projects that mean the most to our legal community. Lastly, taking risks, expanding our reach so legal community knows that SFLPA lives up to its motto... "Excellence through Education."

Changes will be coming in the New Year. I will not be seeking re-election. It's time for me to step aside to allow others to continue the legacy of our Association. Our Election Meeting will take place on Tuesday, March 20, 2018 at Orrick Herrington. The slate of candidates who will be running for office has been distributed. If you are thinking about running for office, it's not too late. Nominations will be taken from the floor. Those nominated must be present to accept. We hope you plan to attend this important election meeting.

The last month of our fiscal year is April 30, 2018. Membership renewals are due on May 1, 2018. As I previously stated, you now have the convenience to renew and pay online through our newly upgraded website. Future events include:

- 82nd Annual Membership Election Meeting Tuesday, March 20, 2018
- Brown Bag Presentation Tuesday, March 27, 2018
- 82nd Officer Installation Gala Saturday, April 21, 2018
- April Brown Bag Presentation April 23, 2018
- 2018-2019 Fiscal Year Begins May 1, 2018
- LSI Annual Conference May 17-20, 2018 at the Beverly Garland Hotel in North Hollywood, CA

For more information or if you would to register for any of the above events, please visit www.SFLPA/eventscalendar. For more information about upcoming Legal Secretaries, Inc. events, please visit their website at www.lsi.org.

Have a fantastic month and I hope to see you soon.

Respectfully, Larry McGrew SFLPA President 2017-2018

Vice President's Message



By: Carol Romo

From the Veep . . .

As you may know, election time is right around the corner and may even have transpired by the time this issue of the Hearsay is published. But I just wanted to make sure all of our members were aware that our President Larry McGrew will be relocating to Nevada in June of

this year to open a new office there for First Legal, his employer of umpteen-years. We will all miss him and wish him well in this new chapter of his life.

I am running for President this election and hope that all of our members will plan on attending our election meeting on March 20, 2019 as this is an important meeting in which our members have the opportunity to decide upon the future leadership of this Association. Even if only one candidate is running for each of the five offices for election this year, nominations can still be made from the floor by any of the members.

For those of you who have joined recently, below is a breakout of our Association's elected officers. Note that the Parliamentarian is selected by the incoming President and the Governor is elected every two years and will be elected this year.



After the election meeting, Committee Chairpersons are selected by the incoming President for each of the following Committees:

	Comn	nittees	
Membership (V.P.)	Education	Programs	Inter-Assn
Website	Employment	Day-In-Court	Legal Procedures
Bulletin Editor (& Advertising)	Marketing (& Public Relations)	Ways & Means	Scholarship

Each Committee has its own set of responsibilities for the course of the fiscal year which runs from May 1 to April 30. The Committee Chairpersons recruit their own Committee Members and always accept volunteers who request to join their Committee. The Officers and the Committee Chairpersons make up the Board of Directors who meet on the first Tuesday of each month to collaborate events and make decisions on various topics including approving new member applications. Meeting minutes are taken at every Board Meeting and are available for our members to read every month. (We will be setting this up on our new website in the Members Only section very soon.)

After the election meeting, a formal installation is held in which the newly elected Officers are installed to their posts by an Installing Marshal and Installing Officer who present each of the elected Officers with a memento related to their office. The past President is presented with a gift from the Board for their time and dedication, and the incoming President announces who the Committee Chairpersons will be for the new fiscal year.

If you want a reason to have a night out on the town, the installation is a perfect opportunity for you to do so. There is good food, a full bar, dance music, and the presentation is short and sweet. You can come alone, or possibly carpool with other members, or bring a guest (for the cost of a non-member meal). Either way, this event is for all of us so I strongly urge you to dress up and come out and have a good time at this years' Installation of Officers. (See flyer in this issue for information on signing up.)

Finally, in closing, I would like to thank everyone for their help with various contributions they have made - you know who you are – on everything from our Open House in the fall to our recent Crab Feed. I appreciate everything each of you did to make things happen. And to those members who brought in new members and held their hand along the way, I am also very grateful. I look forward to working with more of you next year, which I hope will be as your new President.

Come to our election meeting and vote. Come to our Installation and have fun!

Sincerely, your Veep,

Carol Romo

Elections Committee Report

SFLPA NOMINEES FOR EXECUTIVE BOARD & DELEGATES (for 2018-2019 Term)

Nominee for President:	CAROL ROMO
Tommee for i resident.	CIMOL KOMO

Nominee for Vice President:

Nominee for Secretary: SALLY MENDEZ

Nominee for Treasurer:

Nominee for Governor:

Nominee for Delegates:

CHRISTINE J. FLORES, CBA

SCHERYL WARR

JUDY NAKASO

MAY SENE

FRANCIE L. SKAGGS

LILLIAN WONG

Biography of CAROL ROMO Nominee for PRESIDENT



I am a Legal Secretary with Crowell & Moring LLP where I assist five attorneys in a variety of practice fields. I attended my first San Francisco Legal Professionals Association (SFLPA) event in 2005. I later joined and immediately took on the role of Programs Chair in which I planned and arranged dinner meetings, special guest speaker nights, holiday parties and more. In 2015, I was elected as Secretary and has continued to dedicate my time and enthusiasm, often representing the SFLPA at neighboring Association events, including chairing the decorations committee at the annual Legal Secretaries Incorporated (LSI) Annual Installation of Officers.

I served as a delegate at my first LSI Annual Conference and have since enjoyed making new acquaintances by attending several LSI Conferences since then. I learned a lot about procedures and what it takes to keep an organization running. I am pleased to have the opportunity to serve as Vice President this fiscal year and have been instrumental in boosting the SFLPA membership and in assisting the SFLPA to regain its presence with law firms throughout the financial district.

Biography of MAY SENE Nominee for VICE PRESIDENT



I was born in Hong Kong to a very large Asian family of eight children. When I was about 6 years old, my family and I immigrated to the U.S. My siblings and I grew up in the heart of San Francisco's Chinatown.

After obtaining my Bachelor of Arts from San Francisco State University, I continued on to obtain my Paralegal Certificate with SFSU, College of Extended Learning. I have now been in the legal field for about 20 years mainly assisting estate planning sole practitioners with their probate cases. I begin my own freelance probate document business in 2010 when I first joined SFLPA. I am currently serving as the Parliamentarian for SFLPA.

SFLPA have enriched my life, both personally and professionally. The members of SFLPA are wonderful, decent, fun and yet hardworking individuals. It is always a joy to attend SFLPA events and to spend time with my esteem colleagues. I credit SFLPA for helping me launch my freelance business for which I am eternally grateful. Now is the time for me to give back to the SFLPA organization. If elected, I will serve as SFLPA's Vice President to the best of my ability, with great integrity and accountability, and to contribute in any other way that I can to the continuing success of SFLPA and its members.

Biography of SALLY MENDEZ Nominee for SECRETARY



I was born and raised in San Francisco, I am a Past President of the San Francisco Legal Professionals Association, and the current Editor of SFLPA's monthly newsletter, *The Hearsay*, since 2007. I have held several different Board positions and currently serve as the SFLPA's Secretary. I was also the Past Career Promotion/Scholarship Program Chair for Legal Secretaries Incorporated. Today, I am the Senior Secretary at Altshuler Berzon. I have been working in the legal industry for over 19 years.

I have dedicated my time to Civil Rights and Peace Advocacy since my early childhood upbringing in the Mission District in San Francisco. I am a past member and current advocate member of the Mission Girls Services program which is dedicated to empowering young women in the Mission District.

Biography of SCHERYL WARR Nominee for TREASURER



I was born and raised a Southern California girl and began my legal secretarial career back in 1988, after graduating with honors from Watterson Business College in Sherman Oaks, CA. My first job as a legal secretary, which was my stepping stone into the legal industry, was working for a personal injury plaintiff's firm for four years and then into an Entertainment law firm for two years. In 1995, I moved my young family to the Bay Area where I ran my own child care business for approximately 10 years. My kids grew up and here I am again, since 2004, in the Bay Area back out in the wonderful world of legal. I currently work for Trucker Huss, APC. I have been a member of SFLPA since May 2014, wherein I became chairman of Ways & Means, a Historian in early 2015, and Treasurer since 2015/2016.

Biography of CHRISTINE J. FLORES, CBA Nominee for GOVERNOR



I have been a member of the SFLPA since 1990. I have served in many capacities, including President, Vice President, Governor, and Legal Procedures Chair. I am also a Past President of an East Bay Chapter of LSI, and have served on the Bay Area Legal Forum as Secretary and Second Vice President. I began my legal secretarial career in January 1972, working for a sole practitioner, and currently employed at Orrick, Herrington & Sutcliffe LLP, San Francisco, since February 2003.

Biography of JUDY NAKASO Nominee for DELEGATE to LSI Annual Conference



I am a Berkeley, California native. I graduated from UC Berkeley with a Social Sciences Group Major in Social Welfare. I spent two years at the University YWCA as a program director and was lured into the legal field as a legal secretary for a "poverty lawyer". Turns out the public interest law firm of Public Advocates, Inc. is a small but powerhouse firm doing impact litigation – aka class action suits and community organizing. Among the exciting cases was saving fixed rate mortgages in California, integrating the San Francisco Police and Fire Departments, and encouraging banks to fight redlining (not lending in poor communities) but instead to commit to providing funding for low-income homeowners.

Since 1988, I have been working at Sheppard Mullin Richter & Hampton in various

practice groups. I'm currently working with corporate, banking & finance and bankruptcy attorneys. It's exciting to work in a large law firm because of the opportunities for cross-training and expanding my knowledge of law. I tell friends my best legal advice: mediate and don't litigate – you can't afford it.

When I'm not going to SFLPA brown bag lunch seminars and social events, you can find me doing civil rights work with the Contra Costa Japanese American Citizens League, gardening, playing with my cat Trudy, going to the opera or live theater, attending family gatherings, or enjoying Japanese-American bazaars during the summer.

Why I am running to be a delegate? I have never attended an LSI Conference. I'm hoping to be elected as a delegate and I promise to represent you and to advocate for great programs for legal support professionals in SFLPA.

Biography for FRANCIE L. SKAGGS Nominee for DELEGATE to LSI Annual Conference



My name is Francie Skaggs and I am currently serving as the Education Chair of the San Francisco Legal Professionals Association. Prior to serving as Education Chair, I served as the Treasurer, Historian and Secretary, consecutively for the past 5 years. I would like to be your SFLPA Delegate to meet other Education Chairs and find ways to improve the SFLPA educational program.

I have worked in the legal field for 20 years now and the majority of my years have been here in San Francisco. I love the energy, diversity and culture of this city. I currently work at the San Francisco based law firm, Coblentz Patch Duffy & Bass.

As an English major and Political Science Minor, I began my journey into the legal environment and later returned to earn my paralegal certificate. I believe that learning in a classroom setting helps to prepare us for the legal battlefield. I enjoy my chosen career as a legal assistant because it is always evolving. The San Francisco Legal Professionals Association provides a means to stay current in legal procedures and gives its members the opportunity to network and learn among other young professionals.

As Education Chair of the SFLPA, I administered a three- day educational workshop that San Francisco Legal Professionals Association co-hosted with the San Francisco State University Paralegal Program, which turned out to be a success, and raised almost \$4,000 for the SFLPA. As a Delegate for SFLPA in the upcoming annual LSI Conference, I would like to network with other Education Chairs to further improve our educational programs and increase the attendance of our monthly Brown Bags. Brown Bags and education are what makes the SFLPA valuable and beneficial in serving its members. I look forward to the 2018/2019 year and conducting even better workshops to help our members improve and be the best in their career! Please let me be your delegate!!!

Biography for LILLIAN WONG Nominee for DELEGATE to LSI Annual Conference



My name is Lillian Wong and I would like to share a little about myself. I consider myself a San Francisco native even though I came to the U.S. when I was the age of 4 from Hong Kong. Entered the SF school system from kindergarten through high school then attended Cal State Hayward and majored in business and economics.

I have been in the legal field for 26 years and started out as a trainee litigation secretary at my first law firm. After 9 months at the firm, I asked my office manager to enroll me in the SFLPA 5-month secretarial training program, which helped me enhanced my knowledge of various practices of law. I specialized in insurance defense litigation and environmental law working at the firm for 5 years. Currently, I work at Jones Day and I had my 12th anniversary with the firm and I'm in the litigation practice group.

About 4 years ago, I joined SFLPA again as a new member to further my education attending Brown Bag seminars. I made a lot of friends with the members and officers of SFLPA and currently I am on the Board as the Day-In-Court Chair. Last October, I organized my first moot trial at the Hasting College of Law and was a fun experience. It has been rewarding and a learning experience as a Board member. If I'm elected as a Delegate, I will do my best to represent SFLPA.

Education Chair Report

By: Francie Skaggs

San Francisco Legal Professionals Association Practicing Excellence Through Education in its Three-Day Workshop

The San Francisco Legal Professionals Association proudly partnered with San Francisco State University to present a 3-day workshop on January 27, February 3 and February 10, 2018. This was the first workshop that SFLPA has presented in a number of years and was back by popular demand. The sessions began at 8:30 a.m. and ended at 5:30 p.m. over three consecutive Saturdays at the San Francisco State University Downtown Campus. On behalf of SFLPA, I would like to thank Pat Medina, Director of the Paralegal Program at San Francisco State University for all her efforts and support in making this workshop happen.

The 45 attendees, including paralegal students, legal secretaries, and other legal staff who wanted to prepare themselves for advancement were welcomed the first day with bagels and coffee, generously donated by Coblentz Patch Duffy & Bass LLP. They were immersed into the following basic areas of legal practice from 15 gifted instructors with many years of expertise in each field: Court Structure, Taxes and Corporations, Pleadings, Discovery, E-Discovery, Litigation, Filing Procedures, Ethics, Business Writing and Email Correspondence. All attendees took a test on the last day and received a Certificate of Completion from the SFLPA. It was also a treat to see an event where legal staff and students were able to have their many questions answered by instructors who were experienced and highly qualified in each of their subjects.

Extraordinary presenters who graciously donated their time to the educational event included attorneys, doctors, San Francisco State University faculty, paralegals and experts. Those presenters were: Vera Kryukova, Tax Manager of Marcum Accountants and Advisors, Cheryl L. Feiner, Esq. Supervising Deputy Attorney General for the Office of the Attorney General, Fred Crombie, Esq., Partner from Coblentz Patch Duffy & Bass, Vince Avellino, Freelance Bookkeeper & Instructor at SFSU, Larry McGrew, President of the SFLPA and Client Success Manager for First Legal, Diane Mecca, Certified Instructor, Abrams College, Emily McGrath, Esq., Attorney at Lawless & Lawless, Leon Roundtree III, Esq., Legal Account Specialist, Ricoh Legal and LaKeith Whitley, eDiscovery Consultant, Ricoh Legal, Traci Irvin, Esq., of Ropes & Gray LLP, Francie Skaggs, Litigation Secretary at Coblentz Patch Duffy & Bass LLP and Certified Paralegal, Dr. Mary Ann Koory, Professional Writing Instructor at SFSU, Cyndee Sauceeda Legal Assistant Coordinator and Michelle Cleto, Docketing Manager, both at Meyers Nave, and Lindsey S. Mignano, Esq. Founding Partner of Smith Shapourian Mignano PC.

I would personally like to thank the following corporate sponsors that sponsored the event and supplied nutritious breakfasts, lunches, and other goodies to keep allattendees well-fed and able to focus on their studies! SFLPA wishes to recognize the following vendors and law firms: Aptus Court Reporting, Barley Court Reporters, Coblentz Patch Duffy & Bass LLP, First Legal Court Reporters, Jones Day and KL Discovery.

Presenting these workshops is how the SFLPA can help educate our members and others in the legal community here in San Francisco as well as the Bay Area in a forum that allows people to have the answers before the questions arise in the office. Being prepared is always an asset to any employee, and will enhance each person's career. Thank you again for all who supported me through this journey, and my team, SFLPA President Larry McGrew, Governor Christine Flores, Secretary Sally Mendez and Kristen Craig-Reed.

Crab Feed Report

By: Lillian Wong

San Francisco Legal Professionals Association Crab Feed Fundraiser held on February 18, 2018 Pomeroy Rehabilitation and Recreational Center in San Francisco

We had our first crab feed fundraiser on February 18, 2018 in San Francisco with a fairly good turnout. Family, friends, and many of our members were in attendance, as were Kristi Edwards, CCLS, LSI Parliamentarian and Rod Cardinale, Jr. LSI Treasurer. Also there to support our cause were several members from Santa Clara County Legal Professionals Association including President Elise Dresser, CCLS. Thank you all so much for attending. We always enjoy your company and appreciate your support.

All the crab you can eat, plenty of spaghetti, garlic bread and salad along with having our President, Larry McGrew manning the bar. (Don't you love his crab hat?)





Our VP and Co-Chairman of SFLPA Crab Feed, Carol Romo, and her sister, Sandy, manned the kitchen and made sure the food was ready to be served. (Don't you love her crab hat?)





HEARSAY

February 2018



We thank our members and vendors that donated the prizes for the drawing which made this event a success to the tune of \$1,420.00 raised at this event:

Thomas Donnelley (Jones Day Partner); Brian McDonald (Jones Day Partner); Caroline Mitchell (Jones Day Partner); Marc Siegel (Jones Day Partner); Matthew Silveira (Jones Day Partner); Mary Powell (Tucker Huss Partner); Linda Belcher; Tapa Tualaulelei (Jones Day); First Legal Services; Aptus Court Reporting; May Sene (SFLPA); Kristin Craig-Reed (SFLPA); Carol Romo (SFLPA); Larry McGrew (SFLPA); Lillian Wong (SFLPA); and Lynne Gifford.

We had 2 two hours of feasting and communal bonding. This social event was the best by far as we were all crab lovers and there was no better deal in town than that of our own SFLPA's finest all-you-can-eat crab dinner.





Our members, family and friends were eager to dine on crab and even enjoyed the spaghetti sauce Carol had started making two days prior to the event. They also were eager to participate in the drawing of some fantastic prizes.

May Sene, SFLPA Parliamentarian, and her family. (May bought 20 tickets to accommodate her family and friends in their support of our fund raiser.) Thank you, May!





Members of Santa Clara County Legal Professionals Association and others.



Members of SFLPA and in the lower right, Kristi Edwards, CCLS, LSI Parliamentarian, and her husband.



More Friends and Family:









To all those that came to our first annual crab feed, we sincerely thank you for your support and hope you will join us again next year. (That is, if we can convince Carol to do it all over again!)

Sincerely, Lillian Wong, Co-Chairman of SFLPA Crab Feed

SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION CHAPTER ACHIEVEMENTS

(Please submit this form each month.) Month: February 2018

Your N	ame: Position held, if any:	
	Category - Description	
1.	ATTENDANCE - LSI Conference (Circle all that apply)	
	Quarterly Annual	
2.	BENEFITS - Belong through <i>LSI</i> sponsored (<i>Circle all that apply</i>)	
	Credit Union	
	Insurance	
	Hertz	
	Retirement Plans	
3.	CALIFORNIA CERTIFIED LEGAL SECRETARY (CCLS) (Circle all that apply)	
	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 (Circle all that apply)	
	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	
	(Check all that apply)	
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.



San Francisco Legal Professionals Association

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

82ND ANNUAL ELECTION MEETING

Date: Tuesday, March 20, 2018 Time: 5:30 to 7:30 p.m. Place: Orrick, Herrington & Sutcliffe, LLP 405 Howard Street, 10th Floor, San Francisco, CA Upon arrival, check in with the Security Guard to access the 10th Floor Dinner Menu: Pizza, Salad, dessert, soft drinks, coffee, beer and wine. Cost: \$15.00 for Members / \$20.00 for non-members

You can pre-pay using *Venmo* or by registering at our website. You may also bring a check or cash to the meeting, or you can by mail to address above.

Please RSVP: By Friday, March 16, 2018 to reservations@sflpa.org

PLEASE NOTE: 24-hr cancellation required to avoid being charged for meals. No-shows will be charged for their meal. Upon arrival, check in with the Security Guard



San Francisco Legal Professionals Association



March 27, 2018 Brown Bag Presentation

The Ins and Outs of Discovery: Understanding the Process, and the Legalese, in Order to Provide Better Professional Support

Tuesday, March 27, 2018 12:30 – 1:30 p.m. Coblentz Patch Duffy & Bass LLP One Montgomery Tower (Enter through 120 Kearney St.), Suite 3000, San Francisco, CA 94104

Discovery is the fact gathering of the litigation process, and questions are always arising. Claudia will help explain how the discovery process works, what objections mean and why they are important, and why refracting correctly matters.

RSVP to: Francie Skaggs – <u>francieskaggs@gmail.com</u> - by: Friday, March 24, 2018

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



Claudia J. Castillo is the founder of ResolvEmployment Law. Claudia has been practicing law for over 15 years and represents corporations with respect to their employment-law related matters. Claudia founded ResolvEmployment Law in order to provide cost-effective, pragmatic and high quality legal services to California employers.

Claudia's practice includes counseling and defending employers facing claims of harassment, discrimination, retaliation, wrongful termination, disability and wage and hour.

Claudia conducts workplace investigations and provides management and employee trainings in both English and Spanish. She also prepares responses on behalf of employers with regards to charges/complaints filed by employees with government agencies, including the DFEH, the EEOC, and the DLSE. Claudia was born in El Salvador and has full command of the Spanish language. She earned a Bachelor's Degree in Spanish Literature from UC Berkeley, a skill she has put to good use as an Employment Law attorney, often relying on her Spanish skills to help employers effectuate a resolution.

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: <u>www.SFLPA.org</u>.

February 2018

SAVE THE DATE! LEGAL TRIVIA THROWDOWN APRIL 7, 2018

Start forming your teams! Legal Trivia Throwdown is almost here. Save the date and more information will be forthcoming.

Saturday, April 7, 2018 11:30 a.m. to 3 p.m. Nixon Peabody 1 Embarcadero Center, 18th Floor San Francisco

R.S.V.P. by March 30, 2018 to Maria Bishop, CCLS <u>maria@mtdiablolpa.info</u> or 925-324-0712

Mt. Diablo Legal Professionals Association P.O. Box 4253 Walnut Creek, CA 94596



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February 2018

Legal Secretaries, Incorporated LEGAL SPECIALIZATION SECTIONS

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



ARE YOU A MEMBER OF THE LEGAL SPECIALIZATION SECTIONS?

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

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

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

LEGAL SPECIALIZATION SECTIONS 2017-2018 Membership Form

MAY 1, 2017 - APRIL 30, 2018

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. The Legal Specialization Sections (through LSI) offer continuing legal education credit for California Certified Legal Secretaries and MCLE for paralegals and attorneys.

JOIN OR RENEW AT WWW.LSI.ORG

PAY VIA CREDIT CARD OR PAYPAL

<u>SECTIONS</u>	LSI Member Rates:			
(circle which sections you are joining)	Individual Section: \$20			
Civil Litigation	All Six Sections: \$75			
Criminal/Family Law				
Federal Law	Non-LSI Member Rates:			

Individual Section: \$40 All Six Sections: \$150

Dawn R. Forgeur, CCLS LSS Coordinator

c/o Stoel Rives LLP 500 Capitol Mall, Ste. 1600 Sacramento, CA 95814

E-mail: dawn.forgeur@stoel.com www.lsi.org



If paying by check, make payable to "LSI" and mail to the LSS Coordinator. This information is distributed to all members of the Legal Specialization Sections.

Name:

Email Address:

LSI Member, Local Association/MAL: _____

Law Office Administration

Probate/Estate Planning

Transactional Law

Legal Specialty(ies): _____

Counties/Courts:

Newsletters are emailed to members, if you would like to opt out, please email the LSS Coordinator.



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 is 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 read the definition of an Active Membership given on the reverse side of this application. If you have any questions regarding your application for Active Membership, please ask your sponsor or any of the officers of this Association as listed on our website at <u>www.sflpa.gov</u>

Please fill out this application, sign it and submit it to your sponsor along with a check for \$55.00 made payable to SFLPA.¹ This payment covers a one-time initiation fee and your first year² of annual membership dues for Legal Secretaries, Incorporated (LSI).³ A copy of this completed form is your receipt for your annual dues. Upon becoming a member, this information will be included in the Membership Roster which is shared with current members only. You will receive a membership card for the current fiscal year by U.S. Mail.

PERSONAL:	BUSINESS:					
NAME:	Your Title:					
Hm Address:	Employer:					
City ST Zip:	Address:					
Hm Ph:Cell:	City ST Zip:					
Email:	Email:					
[Note: Your contact information will not be distributed	Wk Ph: How long?					
outside SFLPA or LSI without your consent.]	Contact Preference: 🛛 Home 🗆 Business					
SPONSORSHIP:	FORMER EMPLOYMENT					
Sponsor's Name:	Former Employer:					
How did you find out about SFLPA?	City, State:					
	How long?					
Why do you want to join SFLPA?	Total Experience: Legal Litigation:					
	Areas of Practice:					
Have you ever been a member of this Association or any others in the past? If so, when?						
	Have you completed or are you currently enrolled in an SFLPA					
	Civil Litigation course? Yes No					
List at least one SFLPA-Sponsored function that you attended as	1 Mo Yr:					
your pre-requisite for membership and include date(s):	2 Mo Yr:					

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

(CONTINUED NEXT PAGE)

Revised 05/2017

Page 1 of 2

February 2018

Payment can also be made by U.S. mail to the post office b ox listed above or by using an app called Venmo

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.

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:		
To be completed by an SFLPA Officer:			
Approved by Board on:	Initials:	Initiation Date:	

An **Active Member** shall be a person who is licensed to practice law in this state, or who has been actively engaged for a period of not less than one year in any one, or a combination, of the following-named occupations: secretary (whether staff, freelance, or employed fulltime by an employment agency regularly employed to provide legal secretarial support or law office support staff), legal assistant, office administrator, stenographer, typist, clerk or reporter in any law office or court, or in work of a legal nature in a trust department of a bank or trust company, any business which provides legal support services, including legal placement, copying or document processing, process serving, or, the legal department of any public or private institutions, including governmental offices.

Active membership in this Association for a period of not less than one (1) year shall entitle an individual who is no longer engaged in work of a legal nature to continue as such member with all rights, privileges and obligations of an active member except eligibility for elective office.

Application for Active Membership. An application for active membership may be presented to the Membership Chair only after a prospective member has attended one function of this Association, or a seminar or workshop presented by LSI or the Bay Area Legal Forum. The application shall be presented in writing on the form prescribed by Legal Secretaries Incorporated (LSI) and endorsed by a member in good standing. Such application shall be accompanied by the first year's dues, this Association's current initiation fee, the current initiation fee of LSI, if any, and satisfactory proof that the applicant is currently employed in an occupation described in Section 1(A) of this Article II. Membership is contingent upon approval by a majority vote of the members of the Board of Directors present at the meeting at which such application is considered.

Page **2** of **2**

February 2018



San Francisco Legal Professionals Association MEMBERSHIP RENEWAL FORM For The Fiscal Year of May 1st Through April 30th

IT'S THAT TIME AGAIN! Please fill out the renewal form below and mail a hard copy along with your check for <u>\$45.00</u> 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 <u>\$5.00 late fee</u> 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 <u>www.sflpa.org</u>.
- 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:		
Where do you prefer to receive postal mail? □ Home □ Work □ Home □ Work □ Work □ Home □ Work □ Work □ Home □ Work □ Work					□ Work □ Work		
Please indicate your							
Active \$45.00	Associa		□ Life	\$500.00	0 🛛 Honorary (Board Approved)		
DATE SUBMITTED:			AMOUNT EN	CLOSE	D: \$		
E-Mail Addresses:	(Office)			(Home -	optional)		
			BUSINESS				
Employer:				Т	Title:		
Areas of Practice:							
Office Address:							
City:		State	e:		ZIP Code:		
Phone:		Is this info	ormation diffe	erent fr	rom last year? 🛛 Yes 🗆 No		
PERSONAL							
Home Address or P.O	. Box:						
City:		State:			ZIP Code:		
Telephone Numbers Home:			Cell:				
Is this information different from last year? 🛛 Yes 🖾 No							
			OTHER				
Would you consider becoming a committee member? 🛛 Yes 🗖 No							
If yes, list committee	s you would be	interestee	d 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 preference. 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 <u>www.sflpa.org</u>. Thank you for your continued support as a member of the San Francisco Legal Professionals Association.

Revised 01/2015



CHANGE OF ADDRESS FORM

Member Name					
New Address	City			State	Zip
New Home Telephone		New Office	Felepho	ne	
New Personal Email Address		New Work B	E-Mail A	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 Litigation Real Estate Other (Spe 	e cify):		
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.

*NEW BENEFIT: LEGALSHIELD/IDSHIELD Contact: Courtney Coats, Independent Associate (925) 580-6446; <u>coats8@legalshieldassociate.com</u> LegalShield offers legal, identity theft protection, along with a massive Perks Program where you will have significant savings to over 500 local and national companies.	QUESTIONS AND CONCERNS CONTACT: Heather Edwards, LSI Vice President LSI Marketing Committee Coordinator (818) 482-7040 heatheredwardslsi@aol.com
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, <u>info@lsi.org.</u> or LSI Vice President	HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com
FINANCIAL	PROVIDERS
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Angeles County, or referral from existing member.

All LSI members are eligible to join.

Revised 03/2017

Sally Mendez, 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