

# Hearsay

*"We Are Each Valuable, But Together Invaluable"*

## San Francisco Legal Professionals Association



PO Box 2582, San Francisco, CA 94126  
www.SFLPA.org

### *In This Issue...*

#### **A Word from our New President**

#### **Meet Your New Leadership Team**

#### **Feature Article: You Are Not Alone**



## **Our Newsletter - The HEARSAY is Back!!**

*By Sally Mendez - SFLPA Treasurer and Past Hearsay Editor*

The Hearsay is back! Thanks to everyone who has taken the time to help put the Hearsay back in circulation. As you all know, I was the Hearsay editor for over 15 years. I am not the best writer, but I am a talker and the Hearsay helped me organize my words in writing. It allowed me to reach into my creative aspects and show my love and appreciation for SFLPA. I have been a member of SFLPA for 18 years. SFLPA has helped me tremendously and I hope you will all benefit from our membership the way I have benefited.

Larry McGrew and Kate Cochran and others have worked hard to put together this wonderful edition to help bring back one of the key elements in our existence. Thank you all for your hard work and dedication.

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DEPO IN A BOX creates an opportunity to allow witnesses, who may have issues attending in person, to give testimony. This solution can be extended to witnesses in any location.

Michelle Sherry | msherry@litigationservices.com | 415.770.3809



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*One of San Francisco's famous landmarks,  
the "Painted Ladies."*



# Farewell Message

MAY SENE, PAST PRESIDENT 2019-2020



Dear Beloved SFLPA Members,

It has been my honor and privilege to serve as your President for the 2019-2020 fiscal year. I hope you had as much fun as I did! The experience of being a part of the SFLPA Board and a member of SFLPA has enriched me both personally and professionally. I could not have imagined that it would make such a lasting impact in my life. I encourage each and every one of you to get involved by becoming a beloved Board member of the SFLPA. I promise that you will not regret it and that you will come away with an unforgettable life-changing experience!

TOGETHER, we accomplished great things during the 2019-2020 fiscal year. First and foremost, we were successful in stabilizing our financial situation and are in a much healthier position than before. With the hard work of our wonderful Education Chair, Ms. Francie Skaggs, we continued to bring you, our beloved members, high quality, excellent, and relevant Brown Bag speakers and topics including the "Self-Care During COVID-19" education series.

TOGETHER, we are overcoming the pandemic! Although we were unable to meet in person, we utilized the Zoom technology to stay in touch and network with each other. The Board and I kept lines of communication open to each and every one of you. I hope that we were able to provide you with some degree of comfort, hope, and strength during these unprecedented times. Please rest assured that we continue to be here for each of our members.

TOGETHER, we also held a very successful and fruitful S.F. Conference which further stabilized our financial situation. With everyone's diligent efforts, support, and generosity, we had a fun, productive, and profitable Conference. Hooray!

TOGETHER, we established zero tolerance for bullies and made SFLPA a safe and nurturing environment for all members.

*cont'd p.5*



## Farewell Message Cont'd.



Finally, I am especially grateful to have served the SFLPA with one of the greatest Boards ever. Each member of the Board is multi-talented, dedicated, and hardworking. These very special people have enabled me to become a better President. I have been fortunate to make lifelong friends with members of the Board as well as those from our membership. I look forward to continuing those very special relationships and to contributing to SFLPA in other ways! I leave you in excellent hands under the leadership of Ms. Francie Skaggs and her fabulous Board.

I wish everyone good health, good fortune, and good luck in all your endeavors! I will see you soon! Take care, everyone, and be safe!

Best Regards,

May Sene  
SFLPA Past President (2019-2020)



# San Francisco Legal Professionals Association 2020-2021 Elected Officers



**Frances Skaggs**  
President



**Jenny Ha**  
Vice President



**Kristen Craig-Reed**  
Secretary



**Sally Mendez**  
Treasurer



**Christine Flores, CBA**  
Governor

## Appointed Officers, Chairs & Committee Members

Executive Advisor: May Sene - [executiveadvisor@sflpa.org](mailto:executiveadvisor@sflpa.org)  
Parliamentarian: Christine Flores, CBA - [governor@sflpa.org](mailto:governor@sflpa.org)  
CCLS Program: Melissa Dallas, CCLS & Lori Nicollini - [ccls@sflpa.org](mailto:ccls@sflpa.org)  
Chapter Achievement: Christine Flores, CBA - [governor@sflpa.org](mailto:governor@sflpa.org)  
Education: Frances Skaggs, Chair - [education@sflpa.org](mailto:education@sflpa.org)  
Employment: Amy Van Nest, Chair - [employment@sflpa.org](mailto:employment@sflpa.org)  
Hearsay Editors: Kate Cochran & Larry McGrew, Co-Chairs - [editor@sflpa.org](mailto:editor@sflpa.org)  
Interclub: Lillian Wong, Chair - [interclub@sflpa.org](mailto:interclub@sflpa.org)  
Legal Procedure: Larry McGrew, Chair - [legalprocedure@sflpa.org](mailto:legalprocedure@sflpa.org)  
Membership: Jenny Ha, Chair - [membership@sflpa.org](mailto:membership@sflpa.org)  
Professional Liaison/Day-in-Court: Lillian Wong, Chair - [dayincourt@sflpa.org](mailto:dayincourt@sflpa.org)  
Program: Terralyn Graff, Chair & Michelle Sherry - [program@sflpa.org](mailto:program@sflpa.org)  
Scholarship/Career Promotions: Gloria Torres, Chair - [scholarship@sflpa.org](mailto:scholarship@sflpa.org)  
Ways & Means: Lillian Wong, Chair; May Sene & Amy Van Nest  
Website: Sally Mendez, Chair & Kristen Craig-Reed - [treasurer@sflpa.org](mailto:treasurer@sflpa.org)

### Open Positions:

Historian, Public Relations, and Bay Area Legal Forum







# PRESIDENT'S MESSAGE

**FRANCIE SKAGGS**

**2020-2021**

Dear Valuable Members:

I am honored and proud to be your President for the next fiscal year. San Francisco Legal Professionals Association ("SFLPA") is not just a valuable resource for education and information, but it also brings community, networking and support to each other, especially during these unprecedented times.

Ordinarily, we would already be well into our new fiscal year. However, 2020 has been no ordinary year! Like so many things, the Annual SFLPA meeting, traditionally scheduled in March, was interrupted by the pandemic. After a period of idling and wonder, we were finally able to have our virtual election in August, followed by our installation a week later. Our honorable installation officer, Shannon Quigley, Executive Advisor and Parliamentarian of Santa Clara LPA, inducted our amazing new Board of Directors at our superhero themed installation meeting. These superheroes are all ready to soar!

I look forward to working with our new Executive Board consisting of a perfect balance of both experienced and new officers. The veterans are prepared to mentor and guide the new officers as they learn and grow. Our new Board includes Vice President Jenny Ha, Secretary Kristen Craig-Reed, Treasurer Sally Mendez, Governor Chris Flores, Hearsay Editor Larry McGrew and Co-Editor Kate Cochran, and Executive Advisor May Sene. Our members will soon be hearing from our newly appointed chairs for this year: Melissa Dallas, CCLS; Lorri Nicolini; Lillian Wong; May Sene; Amy Van Nest; Terralyn Graff; Michelle Sherry; and Gloria Torres; as they get started on exciting developments for each of their committees. Our SFLPA members will soon be well acquainted with this amazing Board through the events and publications we have planned for the new year.

My goal with the SFLPA is to keep the unity, comradery, and social aspect of attending SFLPA events and not allow the pandemic to stop us! The wheels will continue to roll using Zoom and other technical platforms to continue our Brown Bags, Membership Meetings, study groups and other fun and interactive events. I hope to bring resources to our members to help you get through this challenging time.

*cont'd p. 8*

# President's Message Cont'd.

## FRANCIE SKAGGS



Our new Programs Committee, Terralyn Graff and Michelle Sherry, will be working their magic and planning our quarterly membership meetings, as well as other fun and exhilarating events like our Fun Fitness Challenge in October. Please continue to check our website, look for announcements via email and read our Hearsay for all our future events!

I am thrilled to announce the return of our Hearsay publication! The “Renaissance” of this publication will launch October 12, so look out for it! Thank you to our new Hearsay Editor Larry McGrew and Co-Editor, Kate Cochran. A big shout-out goes to Sally Mendez, the previous (award-winning) Hearsay Editor, who agreed to mentor Larry and Kate so that we can bring this back to our members.

The legal field has proved to be an essential business and it is not going anywhere! There may be some changes, but together, we will find innovative ways to get through this and overcome the challenges! Together, we will rise to the occasion and take on the challenges.

SFLPA is here for its members, and together, we will all succeed through these times. Members' feedback is always welcome. Our Board is here and will answer questions or hear ideas for events and will do our best to make things happen. We are each valuable, but together, invaluable.



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# VICE PRESIDENT'S MESSAGE

Jenny Ha

Hello everyone,

I hope you are staying healthy and keeping well. I commend each and every one of you for having made it 10 months now into a tumultuous year. We are in the final stretch with the holiday season quickly approaching, so hang in there!

I am pleased to be greeting you through the revamped Hearsay. Thank you to Francie Skaggs for spearheading its revival, to Larry McGrew and Kate Cochran for stepping up to be the new editors, and to Sally Mendez for having been a wonderful Hearsay editor in previous years. I look forward to reading and learning from everyone's articles.

For those of you who may not know me, nice to meet you! I joined the SFLPA in October 2019, served as Programs Chair from November 2019 to August 2020, and became Vice President in August 2020. I have been with the SFLPA for one year now, and I am grateful to the membership and Board for the privilege of serving our association in a greater capacity, despite my status as a newer member.

As Vice President, I will focus on leveraging technology to not only attract new members, but also ensure that our current members have their needs met. I think it is more important than ever to support each other professionally and personally as we try to cope with changes at work and in our industry which impact our lives at home. My goal is to create a digital environment that facilitates everyone's access to educational opportunities, to news and events, and to our wonderful community. I hope that in spite of all the uncertainty there may be in our daily lives, we can rest easy knowing that we can turn to at least one steadfast and supportive group .

I would also like to remind everyone that as Vice President, you can reach out to me to report potential breaches to the LPI Code of Ethics. It is my duty to ensure that each and every one of you feels safe and respected at SFLPA events, so please do not hesitate to reach out if you ever experience or witness anything which makes you feel uncomfortable.

Also, please do reach out if you ever have any questions, suggestions, comments, or requests. We cannot improve the SFLPA, have a gauge on what is and is not working well, or help you find what you need without your feedback, so please share your thoughts with us!

Please remember to get enough rest, celebrate victories of any size during these stressful times, and stay safe.



# GOVERNOR'S MESSAGE

CHRISTINE J. FLORES, CBA

## REPORT OF ANNUAL CONFERENCE HYBRID MEETING

August 22, 2020

Just as SFLPA has found it necessary to conduct its business through the use of Zoom, so has Legal Professionals, Incorporated (“LPI”). The Annual Conference Hybrid Meeting, along with the Pre-Annual Hybrid Board of Governors Meeting and the Post-Annual Hybrid Board of Governors Meeting, was held on Saturday, August 22, 2020. The Officers of LPI, a limited number of local association delegates, and some LPI chairmen attended in person at the Stockton Hilton. The meeting was hosted by Stockton-San Joaquin County LPA.

As Governor, I represented SFLPA at the Pre-Annual Hybrid Board of Governors Meeting, which was called to order at 9:00 a.m. by LPI President Heather Edwards. Roll was called and the Executive Secretary announced that a quorum was present. A motion was made to conduct a virtual meeting. The motion carried. The Minutes of the February 2020 Quarterly Conference were approved. The meeting was thereafter adjourned.

The General Session of the 2020 Annual Conference Hybrid Meeting was called to order at 10:00 a.m. by President Heather Edwards. SFLPA was represented by President Francie Skaggs, Governor Christine Flores and Vice President Jenny Ha, serving as Delegates.

Alternate delegates Amy Van Nest and Lillian Wong were in attendance, along with Larry McGrew, Sally Mendez, Kristen Craig-Reed and May Sene. All of us were able to connect to the meeting virtually. The Opening Ceremonies consisted of the Pledge of Allegiance being led by LPI Past President Mary S. Rocca, CCLS and Patricia E. Miller, PLS, CCLS. The Code of Ethics was read by Mary and Patricia. Heather Edwards introduced the LPI Executive Committee and the LPI Past Presidents and special guests in attendance. LPI Administrator Kim Oreno served as Timekeeper and Joseph Rubianes served as Page for the meeting to assist those who attended the meeting in person. Ron Ackland of Beverly Hills Century City LSA served as Registrar and Kristina Rubianes from Stockton-San Joaquin County LPA served as Assistant Registrar.

The meeting continued with the adoption of the 2020 Annual Conference Standing Rules, the 2020 Annual Conference Election Rules, and the 2020 Official Program. The minutes of the 2019 Annual Conference were approved as distributed. Executive Secretary Rod Cardinale, Jr. read the correspondence received.

*cont'd p. 11*



The Nominations and Elections Chair read the slate of officers:

- President – Lynne Prescott
- Vice President – Rod Cardinale, Jr.
- Executive Secretary – Donna Day
- Treasurer – Bettina Jacobsen

There being no nominations from the floor for any office, all of the officers were elected by acclamation.

Treasurer Donna Day presented her report, and on motions made, the actions of the Treasurer in paying the routine bills was carried.

Following a break for lunch, the various awards were announced. San Francisco LPA was awarded the membership gain award with a 7% gain in membership! Kudos to Vice President Francie Skaggs for her membership recruiting! The new Certified Legal Secretaries were recognized. Congratulations to Melissa Dallas in achieving the CCLS designation! Look for a study group to form soon in preparation for whenever the next exam can be given.

President Heather Edwards started a new T.E.A.M. award and this year's recipient was the Publications Revision Committee. Kristi Edwards, CCLS received the LPI President's Award, and Gwendolyn Edwards received the Rising Star Award.

The meeting was followed by a virtual installation of Officers. Jennifer L. Page, CCLS, served as Installing Officer. Newly installed President Lynne Prescott, CCLS shared her vision for the coming year, and announced the names of those who will serve as appointed officers and chairmen. Francie Skaggs has been appointed to the Webinars Committee, Larry McGrew has been appointed Legal Procedure Chair and Amy Van Nest will be serving as a Legal Specialization Section Leader for the Federal Court section. Congratulations! SFLPA is very proud!

The meeting was thereafter adjourned.

The Post-Annual Hybrid Board of Governors Meeting was called to order following the general session. The Proposed Budget for the coming year was adopted. It was announced that the November 2020 and February 2021 quarterly conferences will be hybrid meetings and will be held at the Stockton Hilton in Stockton. The 2021 Annual Conference will be at the Double Tree Sacramento, and hosted by Sacramento LSA. It is expected that this will be an in-person meeting. The last order of business was the drawing for a registration ticket for the November 2020 quarterly conference. San Francisco LPA is one of the recipients of this ticket.

I know I speak for the delegates in saying that it was our pleasure to represent SFLPA at this conference meeting. It has been my pleasure to represent you as Governor. Please remember I am your voice at the LPI meetings. Please let me know of any questions or concerns you have.

# ATTEND THE NEXT LPI CONFERENCE



## CONFERENCE REGISTRATION FORM

Name \_\_\_\_\_ (on \_\_\_\_\_ badge):  
Mailing \_\_\_\_\_ Address: \_\_\_\_\_  
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E-mail Address: \_\_\_\_\_  
Local Association (full name): \_\_\_\_\_ ☐ LSA ☐ LPA

Please check if applicable (include title): ☐ State Officer \_\_\_\_\_  
☐ State Chairman \_\_\_\_\_ ☐ Local Assoc. President  
☐ Governor ☐ CCLS

~~~~~  
**Attendance Choice:** ☐ In-Person (\$35) ☐ Virtual (\$35) \$ \_\_\_\_\_

**OPTIONAL:** Luncheon – Boxed Lunch\* \_\_\_\_\_ @ \$22 each \$ \_\_\_\_\_

*\*Includes Sandwich, Pasta/Potato Salad, Dessert & Drink*

☐ Turkey Sandwich ☐ Ham Sandwich ☐ Veggie Sandwich

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### Two Ways to Register

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Kim Oreno, LPI Administrator  
2520 Venture Oaks Way, Suite 150  
Sacramento, CA 95833

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For Conference Information, Contact: Kim Oreno  
(916) 239-4089 | [Kim@legalprofessionalsinc.org](mailto:Kim@legalprofessionalsinc.org)

# *What have we been up to?*



Photo Caption: Vonciel Gaines, Jenny Cano, Lillian Wong, Francie Skaggs & Amy Van Nest

## **2019 LSI Quarterly Conference**

### **Hosted by San Francisco LPA**

**By May Sene, SFLPA Past President 2019-2020**

The San Francisco Legal Professionals Association proudly hosted the LSI Quarterly Conference on November 22 – November 24, 2019 at the Hilton Hotel located at the border of the financial district and Chinatown of San Francisco. We kick started this very special event with our Welcome Reception on Friday night with a wide array of delicious Chinese dim sum followed by an entertaining and fun event with a “Night Tour of San Francisco”. We had two fully occupied cable car trolleys with standing room only! Everyone commented that they had a blast.

On the following day, Saturday, November 23, various continuing education events were held followed by our “City Lights” Banquet Night. The LPI Board outdid themselves by dressing up in their favorite singer/band outfits and did a wonderful job lip syncing to their favorite artist/band. Everyone put on such a great performance that we were all up on our feet enthusiastically singing and clapping along. Not to be outdone, SFLPA also set up a fun photo booth where many of us took some fabulous and memorable group photos. To end our fun-filled evening, we just danced the night away to wonderful musical entertainment provided by Goodbeat Productions!

On Sunday, November 24, we concluded our great conference with a delicious brunch along with our fun Beach Blanket Babylon Hat contest. All of the participants of the contest outdid themselves with their beautiful and creative homemade hats proudly representing their various county neighboring associations. Kudos to each and every participant for their amazing hat entries. Everyone was a winner in my book!

Throughout the conference, we also had a number of vendors who held exhibits on the second and third floors of the Hilton. We are very grateful to each and every one of these vendors for helping make our conference a success.

*cont'd p. 15*



*Sally Mendez at Registration Table*



*Conference Poster*



*Center piece at the Banquet*

## 2019 Quarterly Conference Cont'd.

Finally, due to the generosity of our beloved SFLPA members, the law firms that they work for, our various vendors, and our wonderful neighboring associations, we had over 100 gift baskets for raffling. We also had about 30 donated gift cards which were each displayed in fun and inspiring photo frames. Many thanks also to those law firms and vendors that donated goodies for our boodle bags. As a token of our appreciation, street signs displaying the names of our various donors were on display throughout the hotel.

All in all, the conference was a huge success due to all the careful planning, the talents and hard work of the entire SFLPA conference team, the generosity of those that donated to the conference, and the invaluable assistance of the LPI conference team. SFLPA made a total of \$8,000 from the S.F. Conference which I believe may be an all-time record! Congratulations, Team S.F. Conference, and THANK YOU for making it a fun and unforgettable experience!



*Francie Skaggs and Steve Lanctot, Esq.*



*LPI President Heather Edwards,  
Gwendolyn Edwards and May Sene*



*LPI Past President, Christa Davis*





# YOU ARE NOT ALONE:

## PRACTICING EMPATHY IN THE COVID ERA

**By Ana Fatima Costa**

### FEATURE:

When confronting a perceived threat, our amygdala – the part of the brain that manages emotions and protects us from danger – releases adrenaline and cortisol to prepare us for fight or flight. Our body's response happens so fast, we don't notice the increased heart rate; elevated blood pressure; shallow, rapid breathing; or sweaty palms. Habitual patterns kick in – run, lash out, or hide! We overreact: “lose it” with our spouse, child, co-worker, or store clerk. Later, we may be filled with regret. This cycle is repeated in everyday “normal” life.

Then COVID-19 threw our lives upside down:

Statewide government stay-home orders. Courts and other public places shut down. Masks required everywhere. Sanitization of hands and surfaces. Businesses closed. Massive unemployment. Plus, global social unrest and a divided U.S.

You are not alone if you feel powerless, scared, and worried.

Before my August 25, 2020 Brown Bag webinar, I asked SFLPA President Francie Skaggs to poll members what is keeping them up at night and included a summary of their responses.

**Top COVID-19 Challenges**  
(as shared by SFLPA members)

- Isolation
- Lack of motivation / procrastination / overwhelm
- Performance issues
- Technical issues while working remotely
- Missing human physical connection
- Time management
- Feeling unsafe going to office
- Lack of appreciation for risking safety to go to work
- Employee morale
- Disruptions to routines
- Poor ergonomics at home workstation
- Worries about taking too few breaks or too many
- No social events to look forward to
- Stress about protests, political unrest, election
- Will this ever end?

You Are Not Alone: Practicing Empathy in the COVID Era. Copyright 2020, Ana Fatima Costa & Costa Consulting & Consulting. All Rights Reserved.

Addressing members' myriad needs would take longer than a 60-minute webinar, so I shared Nonviolent Communication (NVC) [1] and HeartMath Institute's [2] heart-centered processes that provide relief for all situations, Dr. Brené Brown's compassionate straight-talk, and breathing techniques from author James Nestor's Fresh Air interview, How the “Lost Art” of Breathing Can Impact Sleep and Resilience. [3]

*cont'd p. 17*

# YOU ARE NOT ALONE CONT'D.

- Using NVC's practice of naming what we feel and need to ourselves (self-empathy) releases the amygdala's hold, and we are more open to what others feel and need (empathy).
- Focusing attention on our heart while feeling appreciation, HeartMath's powerful scientifically-proven techniques result in mental clarity and reduced stress and anxiety.
- University of Houston research professor Brené Brown has studied courage, vulnerability, shame, and empathy for 20 years; authored five New York Times bestsellers; and delivered one of the Top 5 TEDTalks of all time (50 million views), *The Power of Vulnerability*. [4]

*"I believe that you have to walk through vulnerability to get to courage.  
Therefore, embrace the suck ...."*

In other words, sharing how we feel with trusted family and friends can make us feel uncomfortable (vulnerability), but when we do, we no longer feel alone.

- We take breathing for granted, unless we have asthma or are sick. Needing to use masks and COVID-19's impact on lungs has forced us to become more aware. James Nestor suffered from sleep apnea, pneumonia, and bronchitis. After his doctor recommended a breathing class, he learned that breathing through the nose heals many medical issues.

Breathing consciously and using the above tools will lead to greater health, connection, and ease.

*Ana Fatima Costa is a certified coach. Contact her at [ana@anafatimacosta.com](mailto:ana@anafatimacosta.com) to learn more.*

## *Resources*

[1] *The Center for Nonviolent Communication:* <https://www.cnvc.org/about>

[2] *HeartMath's Quick Coherence Technique:* <https://www.heartmath.com/quick-coherence-technique/>

[3] *Nestor, James, Fresh Air (May 27, 2020):* <https://www.npr.org/sections/healthshots/2020/05/27/862963172/how-the-lost-art-of-breathing-can-impact-sleep-and-resilience>

[4] *Brown, Brené, TedxHouston (June 2010):*  
[https://www.ted.com/talks/brene\\_brown\\_the\\_power\\_of\\_vulnerability?language=en\\_text](https://www.ted.com/talks/brene_brown_the_power_of_vulnerability?language=en_text)



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# Virtual Officer Installation

**SFLPA Super Hereos**

**By Jenny Ha**

On the evening of August 18, SFLPA members came together on Zoom for our annual installation night to celebrate the previous year, and welcome the officers for the 2020-2021 fiscal year. The theme and dress code for installation night was “superheroes”. Many members came dressed as Wonder Woman!

We had two fun activities to start. The first was an icebreaker where we all shared one superpower we already have (like being organized, or being a social butterfly), and one superpower we would like to have (like flying, or healing others). The second was a “Board game” where we matched a mysterious fun fact to an incoming officer. Can you guess which officers were accomplished students, are related to our unofficial mascot, were on TV, made too many facemasks, or took a bite out of crime?

Derek Liu from Baker McKenzie was our guest speaker, and presented on the topic of leadership. He reminded us that any legal professional can be a leader and vector for change at work and in the legal field. He encouraged us to keep apprised of new tools and processes, share our knowledge, and to make suggestions and manage up.

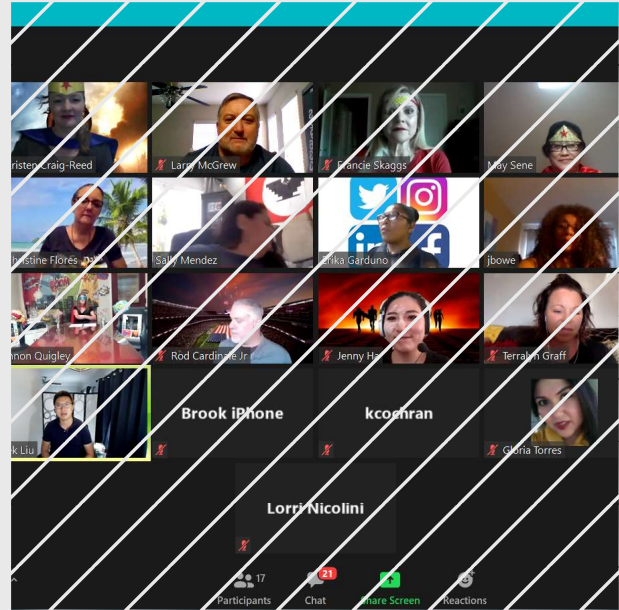
Then, Shannon Quigley of Santa Clara County Legal Professionals Association graciously served as our Installing Officer. Chuckles ensued as our new officers took their oaths simultaneously via Zoom, where five different voices and internet speeds led to a humorous echo.

Finally, outgoing President May Sene was thanked with a pair of diamond earrings for her extended year of service, and incoming President Francie Skaggs announced her focus on synergy for the new fiscal year.

Thank you to everyone who came out to celebrate. We are glad that you enjoyed our dress code and activities as much as we did!

Congratulations to the new officers! We look forward to all that you will accomplish throughout this new fiscal year.

Special thanks to Shannon Quigley, Derek Liu, Rod Cardinale, Jr. and Erika Garduño, and the 2019-2020 SFLPA Board, especially Kristen Craig-Reed.



**SFLPA Members attending the Virtual Officer Installation Ceremony**



# EVENT CALENDAR

## October

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Board Meeting:  
Tuesday, 10/6

General Membership Meeting:  
Tuesday, 10/20

Brown Bag Presentation:  
Tuesday, 10/27

Fitness Challenge:  
10/1 - 10/31

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## November

Board Meeting:  
Thursday, 11/5

LPI Quarterly Hybrid  
Conference:  
Saturday, 11/21

Brown Bag Presentation:  
Dark for Thanksgiving Holiday

All SFLPA events are posted on our website at [www.sflpa.org](http://www.sflpa.org) -  
click on the Event Tab.

We also invite you to visit LPI's Event Page at  
[www.legalprofessionalsinc.org](http://www.legalprofessionalsinc.org).



## San Francisco Legal Professionals Association Quarterly Membership Meeting



**Tuesday, October 20, 2020 6:00 -7:30 pm**

*Via zoom*

**Speaker: Amy Gluchowski**

**Topic: Five Pillars of Health and Fitness**

**Since this is our Fun Fitness Challenge month, we have invited Amy to speak and help us all stay motivated. We are also doing a costume contest!!**

**Wear your scary, fun or crazy costume and you might win a \$50 Amazon Gift Card!**

Amy graduated from California State University, Chico with her Bachelor of Science degree in Exercise Physiology/Pre-Physical Therapy. She has been working in the Health and Fitness Industry as a personal trainer and group fitness instructor for the past 6 years. Amy's certifications and specialties include corrective exercise, nutrition coaching, strength and conditioning, weight loss and behavioral change. Her experience and love for coaching her clients to their goals and shift their mindset about health and fitness is what makes her passionate about her career.

BS- Exercise Physiology, NASM- CPT,CES,PNI, CSCS March 2021

**RSVP to: [program@sflpa.org](mailto:program@sflpa.org) by Friday, October 16, 2020**

Let's have a scary fright night of fun, prizes and wonderful memories.







# MEMBERSHIP

Established in 1934, Legal Professionals Inc., also known as “LPI,” is a nonprofit, mutual benefit corporation organized for the purposes of providing educational, professional, and personal development programs to its members.

Membership is open to anyone within the legal profession. In addition to legal support professionals, the membership includes court clerks, court reporters, paralegals, legal assistants, legal administrators, banking/trust department personnel, legal support vendors, and attorneys.

Local associations, located throughout the state, offer monthly educational and professional programs. Many sponsor lunchtime learning, evening, and weekend long-term educational workshops.

## Advantages of LPI Membership:

- Continuing education and professional development
- Local association educational meetings
- Networking with other legal professionals
- *The Legal Secretary* magazine (published quarterly)
- Benefits available to members on an individual basis:
  - Discounts on LPI’s Rutter Group publications
  - Financial consulting
  - Disability income plan
  - Long-term care plan
  - Medical plan
  - Credit union memberships
  - Rental car discounts

## LPI Conferences:

Conferences are held May, August, November, and February at various locations throughout California. Continuing educational seminars and workshops are offered at each conference, conducted by respected attorneys, judges, and educators. Updated materials are provided for each workshop.

## Membership-At-Large:

There are over thirty associations within the State of California. Legal professionals may join LPI as a Member-at-Large if a local association is not within a reasonable distance. Members-at-Large are eligible for all of the benefits of membership, but joining LPI through a local association provides instant access to the benefits of the local association as well as LPI.

## LPI Publications:

*Legal Professional’s Handbook* – This best-selling, two-volume publication sets out procedures and forms in most areas of law in a clear, concise manner.

*Law Office Procedures Manual* – This publication, an excellent training tool, contains completed Judicial Council forms, procedural guidelines and a glossary formulated for legal procedure.

*Legal Secretary’s Reference Guide* – The essential, handy desk reference guide for busy legal professionals.

*The Legal Secretary* – This quarterly magazine, published by LPI and distributed to all members, contains educational and professional development articles from LPI officers, chairmen, members, and guests.

## LPI Programs:

California Certified Legal Secretary – Become more valuable in your office, maintain and increase your skills, gain more confidence, earn more respect, and achieve greater financial security by achieving certification through the CCLS program. Online study courses are offered.

Legal Specialization Sections – Further your legal education by joining one or all of the Legal Specialization Sections: Civil Litigation, Criminal/Family Law, Law Office Administration, Probate/Estate Planning, Federal Law, and Specialty Law. Classes are offered free to members at each LPI conference, as well as online. Members receive a statewide roster of counterparts and quarterly newsletters.

Legal Secretary Training – Online classes are offered, including Beginning Legal Secretary and Advanced Discovery. Classes are work-at-your-own-pace, and are designed for legal staff at all levels.

**For more information about membership or an association near you, contact LPI’s Corporate Office: Kim Oreno, [kim@legalprofessionalsinc.org](mailto:kim@legalprofessionalsinc.org); [www.legalprofessionalsinc.org](http://www.legalprofessionalsinc.org). Find us on Facebook, Instagram, LinkedIn & Twitter!**

Take a step in the right direction. Advance your legal career, improve your professional and personal skills.  
**BECOME A MEMBER OF LPI TODAY.**



## LEGAL SPECIALIZATION SECTIONS

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The LSS is a program of Legal Professionals, Inc. (LPI)\*, dedicated to providing continuing legal education for legal professionals.

\*Membership in the Legal Specialization Sections is separate from membership in LPI and requires a separate application and fee process.

Visit <https://www.legalprofessionalsinc.org/> for pricing & membership.

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## **MAKE A CAREER CHOICE – BECOME A LEGAL PROFESSIONAL**

### **Why Become a Legal Professional?**

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- Legal professionals fulfill a vital and meaningful roll for law firms and attorneys
- Continuing education enhances legal professionals making them an asset to every employer

### **Why Join Legal Professionals Incorporated?**

- Become one of the over 1,300 elite legal professionals in California
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- Continuing education is the main focus of Legal Professionals Incorporated
- Our motto: Excellence through Education
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- 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 and Continuing Education Council of Legal Professionals Incorporated

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- Enroll in a training course offered by a Legal Professionals Incorporated association in your area
- Legal Professionals Incorporated offers scholarships to non-members interested in pursuing a career in the legal field

**Contact Legal Professionals Incorporated for an association near you for further information!**

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Sacramento, CA 95833  
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**LPI® – Educating California's Legal Professionals**





## CALIFORNIA CERTIFIED LEGAL SECRETARY

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- Broaden your opportunities for job advancement
- Enhance your self-confidence and self-esteem
- Gain further recognition and respect within the legal community
- Increase your marketability to potential employers



To attain certification, examinees must demonstrate knowledge and ability in the following areas:

- California Legal Procedures
- Legal Terminology
- Legal Computations
- Skills
- Ability to Communicate Effectively
- Reasoning & Ethics
- Law Office Administration

### Requirements:

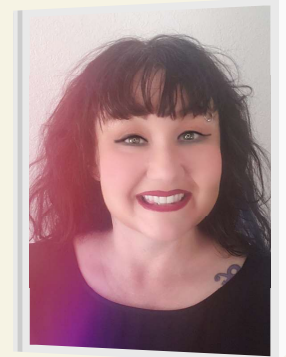
- Examinees must have two years of full-time experience as a legal secretary, or the equivalent, as approved by the CCLS Certifying Board
- Membership in LPI is not a requirement
- Examinees must pass the 8-hour CCLS Exam
  - Given twice a year in March and September
  - Exam locations both Northern and Southern California.
  - Passing is either 75% overall or 70% on every section
- CCLSs must recertify every three years by meeting recertification requirements. Satisfactory completion of a minimum of 15 hours of CCLS-approved seminars, programs, or academic courses over a three-year period that focus on the duties of legal support staff will satisfy the requirements

Study groups are available online through LPI, or through local associations of LPI. For more information and to get your CCLS application form and information kit, visit LPI's website at [www.legalprofessionalsinc.org](http://www.legalprofessionalsinc.org), or contact LPI's Corporate Office: Kim Oreno, [kim@legalprofessionalsinc.org](mailto:kim@legalprofessionalsinc.org).

**CROSS THE BRIDGE TO SUCCESS – BECOME A CCLS®**

# CALIFORNIA CERTIFIED *Legal Secretary*

**My CCLS Experience - By Melissa Dallas, CCLS**



I fell into the legal field by accident, having just moved back home to California from Florida. I was really just looking for a job, and then at age 26, I got a job as a receptionist at in-house counsel for State Farm, where I stayed 8 years and where I met my husband. He was temping at my office while waiting for bar results. As a great advocate for education he encouraged me to keep going up the ladder and I jumped into becoming a legal secretary. On a wing and a prayer, I became a legal assistant at a few small firms over the years and had no idea there was any such thing as a CCLS Exam.

When I landed at Coblenz I had no idea all the perks that were in store for me, one of which was meeting Francie Skaggs, who was the education chair at LPI and my direct link to finding out about the CCLS Exam. I was interested right away and wanted to prove to myself that this old dog could still learn new tricks. Francie was planning to take the exam too, so we found a study partner in each other. I believe I signed up in April for the September 2019 exam, planning far in advance and obtaining the suggested study materials. As the material came in and this book and that book and I discovered more about the subjects to be covered, I wondered, "What have I gotten myself into?". There was also an online study group; I knew I could use all the help I could get and signed up for that too. It included a course outline and was full of helpful hints as to how far out to begin studying.

Quickly the months disappeared and by the end of June, Francie and I decided we must start studying every week. We began printing and organizing study material by the week per the online study group. I think we had to adjust to taking this new time out of every Thursday evening to put our thinking caps on after a long day of working, but we stuck to it and even rescheduled to a different night if there was a conflict. I had a planned vacation with my family to go to Hawaii in August and even though I condensed my materials to study on the plane – that did not happen. I thought I got behind, but also followed other helpful hints trying to catch up.

We discovered some wonderful apps to download to your phone to create flashcards which have built-in exams to quiz you. I highly recommend the flashcards. You could study them on public transportation commutes to and from work. Riding the bus to and from work also gave me time to review over and over the pre-recorded study group sessions. There were also practice tests provided in the material which we would take with each other weekly and further discuss areas we struggled to understand and in some instances, looked up and researched and sometimes found our materials had errors. I have a background in litigation, but the test covers real estate, transactional, and family law, citations, calendaring, ethics and discovery. It's a lot of material. A LOT.

*cont'd p. 28*

# ***My CCLS Experience Cont'd.***

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As the date approached we booked a hotel room nearby to alleviate any commute stress to Palo Alto. It was also suggested in the study guide to not cram and further study the night before, just lay the books down and enjoy a nice meal and get some rest. We did just that. We met up with another gal and had a lovely dinner. The morning of the test was finally upon us and we only had a two-minute drive to the test site; being so close definitely helped remove any additional nerves. The test space was large and comfortable and the proctors were very nice.

Then the exam began. A few hours later, I was drained, but I was very surprised at how confident I felt when it was all over. It was nerve wracking to wait two months for the results and when they arrived via email with wonderful news...YAY! I got her done in one try! We opened champagne with dinner and celebrated my accomplishment!

I do not believe you could go into this test without a significant amount of studying and pacing it out, and it really helps to have a study partner. I highly encourage anyone to take the CCLS Exam. Even if you don't pass it in one try, it's still a great achievement and you will be proud of yourself. It boosted my confidence and now, 20 years later, I don't just have a job, I have a full career with credentials.

---

## **CCLS Mini Quiz By Lorri Nicolini**

### *Reasoning and Ethics*

1 - In order to provide some protection to the public, California law requires every notary public to file an official bond in the amount of:

[A] \$10,000 [B] \$15,000 [C] \$20,000

### *Legal Computations*

A settlement has been reached in which four defendants will share the burden of paying the award.

Plaintiff was awarded \$480,000. Defendant A is responsible for 40 percent of the total award.

Defendant B, a subsidiary of Defendant A, has been assigned 5 percent of Defendant A's burden.

Defendant C will pay 55 percent of the total, while Defendant D will pay the remaining 5 percent of the total award.

2 - Defendant B will pay:

[A] \$19,200 [B] \$192,000 [C] \$9,600 [D] \$96,000

### *Legal Terminology*

3 - A demurrer is a formal objection to a pleading.

[A] True [B] False

*CCLS Mini Quiz Answer Key p. 35*





**California Certified Legal  
Secretary**  
A Program of LPI®



## APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LPI Membership Card (if applicable), and fees to:  
**Vivian L. Shreve, CCLS, c/o WSGR, 650 Page Mill Road, Palo Alto, CA 94304**

|                                              |                                                       |
|----------------------------------------------|-------------------------------------------------------|
| (Select one)                                 | (Select one)                                          |
| <input type="checkbox"/> Northern California | <input type="checkbox"/> Saturday, March 20, 2021     |
| <input type="checkbox"/> Southern California | <input type="checkbox"/> Saturday, September 18, 2021 |

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

|                                                  |                          |                                                                                    |                                                                                                                                                                                                                                                 |
|--------------------------------------------------|--------------------------|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>EXAMINATION FEES</b><br>(Select Payment Type) |                          | <input type="checkbox"/> <b>Check</b><br>Payable to "LPI"<br>Mail to above address | <input type="checkbox"/> <b>PayPal</b><br>Email exam application to<br><a href="mailto:CCLSCertifyingBoard@gmail.com">CCLSCertifyingBoard@gmail.com</a> .<br>Payment link will be provided upon<br>confirmation of eligibility to sit for exam. |
| <b>LPI Members</b>                               | <input type="checkbox"/> | <b>Non-LPI Members</b>                                                             | <input type="checkbox"/>                                                                                                                                                                                                                        |
| On Time Registration Fee                         | \$ 25.00                 | On Time Registration Fee                                                           | \$ 75.00                                                                                                                                                                                                                                        |
| Examination Fee*                                 | 100.00                   | Examination Fee*                                                                   | 100.00                                                                                                                                                                                                                                          |
| Late Fee (if applicable)                         | 45.00                    | Late Fee (if applicable)                                                           | 45.00                                                                                                                                                                                                                                           |
| <b>TOTAL DUE w/o Late Fee:</b>                   | <b>\$125.00</b>          | <b>TOTAL DUE w/o Late Fee:</b>                                                     | <b>\$175.00</b>                                                                                                                                                                                                                                 |

### Personal Information

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

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

Last 4 digits of SSN: \_\_\_\_\_ Email: \_\_\_\_\_

Phone (Day): \_\_\_\_\_ Phone (Evening): \_\_\_\_\_

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

Name of Local LPI Association: \_\_\_\_\_

### Employment Information

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

Position: \_\_\_\_\_ Dates of Employment: \_\_\_\_\_

Employer: \_\_\_\_\_  
(name and address)

Supervisor: \_\_\_\_\_ Supervisor's Phone: \_\_\_\_\_

Supervisor's Email: \_\_\_\_\_

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

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

Date: \_\_\_\_\_

Applicant Signature

\*Fees subject to change without notice.

Rev. April 2020



# Virtual Trivia Fundraiser

By Kristen Craig-Reed

In a year like 2020, nostalgia comes easy. Who wouldn't want to escape our current reality and go back in time a bit? Well, that's exactly what we did on Friday, September 18th for SFLPA's first-ever virtual trivia night! Participants mentally traveled back 20-40 years to indulge in pop-culture trivia from the 1980s and 1990s. Many of us even dressed in fashions from those decades: side-ponytails, neon off-the-shoulder t-shirts, lace fingerless gloves, and gaudy plastic jewelry.

The trivia event was hosted by Yaymaker, the same company that brought us our Paint Day/Nite events, and they did a fabulous job. We had six teams of 3-4 participants, and each team chose their own creative team name. The teams were called: San Francisco's Finest, Modern Day Rosies, Barkley Bettys, Stray Cats & Cool Kittens, Rodney's Angels (from SCCLPA) and Super Friendly Party Animals (from SFPA).

For the 'question rounds' of our trivia event, Quiz Master Bee asked a pop culture question and gave us 30 seconds to privately chat our answer to her co-host, who was designated as 'Submit Here' to alleviate confusion (his real name was Lorde). There was no need for teammates to confer on their answers, as only one member from your team needed to get the answer correct for the whole team to get the points for that question. And thankfully, correct spelling was not required. One of the questions was: Which popular female artist released a greatest hits album titled 'The Immaculate Collection' in 1990? Answer: Madonna!

There was a Pictionary round and a 'name that tune round' where instead of private chatting our answers, we publicly chatted and the first three teams to get the correct answer got the points. We all agreed this round was more about how quickly one could type than anything else.

For the final round of the game, there would be one question that we would have three entire minutes to answer. We were told the subject was the TV show 'Full House.' The point totals were announced for each team and we were asked how many points we were willing to wager. Some teams felt confident and bet everything they had, while others were more conservative. Quiz Master Bee then gave us the final question: What were the names of Uncle Jessie's twins? Do you know the answer?

The big winners for the night were our friends from the San Francisco Paralegals Association, team Super Friendly Party Animals. In second were our buddies from Santa Clara County Legal Professionals Association, team Rodney's Angels. And my team, the Barkley Bettys, claimed third. It was a totally awesome night!



# Legal Procedure Blog

This section will be about keeping our members up-to-date on changes that occur in the legal industry. This will include any notices from the courts, articles, and tips and tricks, as well as any information to help everyone progress in the job by providing educational content. From time to time, we will highlight information distributed from the LPI Blog.

*The following information has been posted on the LPI Blog:*

## **California Court Notices:**

- **Contra Costa** - Updated Unlawful Detainer Case Filings
- **Fresno** - Temporary Case Consolidations and Court Closures 2020-2021
- **Los Angeles** - Message from the Presiding Judge-Elect Eric C. Taylor
- **Los Angeles** - Advanced Attorney Portal Features
- **Los Angeles** - Correction: Appellate Division Hearings Set 2021
- **Los Angeles** - Court Will Reject Non-Text Searchable Documents Effective 11/2/2020
- **Los Angeles** - Mandatory eFiling for Non-Adoption Documents in Juvenile Cases
- **Orange** - Notice of Fee Changes Effective 11/2/2020
- **San Diego** - New, Revised or Repealed Documents for San Diego
- **San Diego** - Civil eFiling Expansion Effective 10/1/2020
- **Santa Clara** - Policy Changes Regarding Court Reporters
- **Ventura** - Court Announces Furlough Dates for 2020-2021

## **Federal Court Notices:**

- **U.S. Courts** - New Jury Instructions Strengthen Social Media Cautions

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You can subscribe to the blog to get updates. Visit the Legal Procedure Blog on Legal Professionals, Inc.'s website: to [www.legalprofessionalsinc.org/lpi-blog/](http://www.legalprofessionalsinc.org/lpi-blog/)





# Legal Procedure Blog

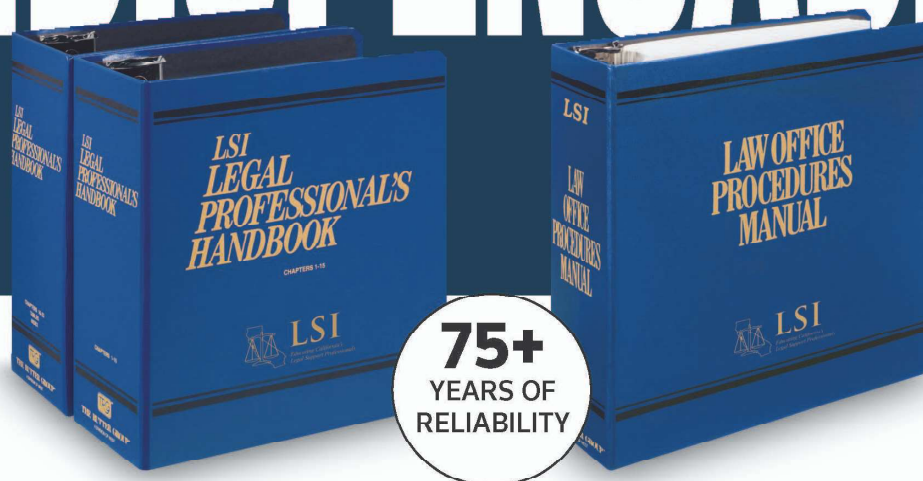
## *Health & Wellness Tips: "10 Dos and Don'ts for the Remote Worker"*

*By Carolyn Herkenham and Kelly Pesanelli - BU Today*

- 1 - **DON'T HUNCH OVER YOUR LAPTOP:** It is easy to work on your laptop for a few hours on the weekend but doing so for 40-plus hours a week can lead to back, shoulder, and neck strain. If you can, use an external monitor or laptop stand (with an external keyboard and mouse) to prop up your screen. When looking at the screen, your eye line should be level with the address bar on your web browser.
- 2 - **DO WORK AT AN APPROPRIATE HEIGHT:** Find a working height so that your elbows naturally fall flush with your table/desk height. This will promote better wrist alignment rather than impingement or carpal tunnel stress.
- 3 - **DO USE AN OFFICE CHAIR IF POSSIBLE:** Adjustable features on an office task chair will save you from lumbar and neck discomfort.
- 4 - **DON'T GIVE UP ON YOUR CURRENT CHAIR:** If you do not have the option of an office chair, there are some household items you can use to help you adjust. Putting firm cushion or tightly folded towel under your buttocks will raise your hips and increase the curve of your spine, making sitting more comfortably.
- 5 - **DON'T LET YOUR FEET DANGLE:** Place your feet on a few books or boxes under your desk, so that your thighs are nearly parallel to the floor and your hips are slightly higher than your knees. This will reduce stress on your lumbar spine.
- 6 - **DO FOLLOW THE 20/20/20 RULE:** For every 20 minutes spent looking at a computer screen, you should spend 20 seconds looking at something else 20 feet away. This gives your eye muscles a break and helps reduce eye strain.
- 7 - **DON'T TURN YOUR COUCH INTO A WORKSTATION:** As tempting as it is, the couch is not an optimal place to work at your computer for the entire day. Although it may be comfortable, having your legs or full body in a vertical position can lead to muscle numbness and discomfort.
- 8 - **DO CUSTOMIZE A SPACE THAT FITS YOU:** Try to set up a workstation that you can make entirely your own. Sharing a workstation means you need to adjust your computer height, chair, and furniture every time you sit down. Often, you may choose to skip adjusting the workstation altogether. If you are the only person using the space, customizing will reduce the time and discomfort of sitting at a station that does not fit you.
- 9 - **DON'T SKIP LUNCH AND MAKE SURE YOU STAY HYDRATED:** It is easy to snack throughout the day instead of eating like you did in the office. Making a meal and staying hydrated gives you the opportunity to stand up, walk around, and let your eyes have a rest from the computer screen.
- 10 - **DO MAKE SURE YOU GET UP AND WALK AROUND:** The goal is to get in as many steps as possible during the day, even if you are at home instead at the office.

*"This story was originally published on BU Today [<http://www.bu.edu/articles/2020/10-ergonomics-dos-and-donts-for-those-now-working-from-home/>]"*

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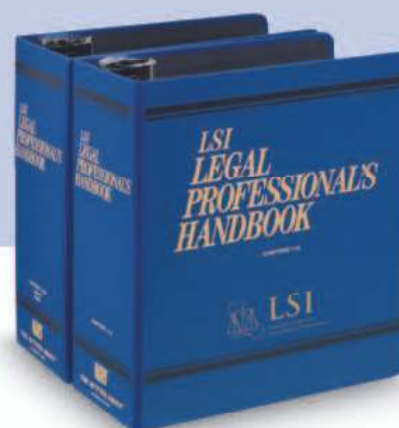
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compiled by Legal Professionals Incorporated  
published by The Rutter Group



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- California Court System
- Statutes of Limitation/Jurisdiction
- Attachment/Other Provisional Remedies
- Commencement of Civil Actions
- Discovery in Civil Actions
- Pretrial and Judgment in Civil Actions
- Postjudgment Proceedings
- Civil Appeals and Writs
- ADR
- Foreclosures: Mortgages and Trust Deeds; Mechanic's Lien
- Unlawful Detainer
- Federal Civil Procedure and Appeals
- Bankruptcy
- Family Law
- Adoptions
- Criminal Law and Procedure
- Probate Proceedings: Decedents' Estates; Guardianships/Conservatorships; Trust Law
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LEGAL PROFESSIONALS INCORPORATED

# LAW OFFICE PROCEDURES MANUAL FOR CALIFORNIA LAW PRACTICE

compiled by Legal Professionals Incorporated  
published by The Rutter Group



## THE IDEAL TRAINING MANUAL FOR NEW STAFF! QUICK REFERENCE FOR EXPERIENCED STAFF!

**The Problem:** Training new law office staff members is time-consuming and expensive. The adequacy of the training is often dependent on the ability of the existing staff. Loss of key personnel may make it impossible to train and supervise less experienced staff.

**The Solution:** A system for training new staff and a reference source for all existing office personnel. The **Law Office Procedures Manual**, created by Legal Professionals Incorporated, provides everything you need to know about the forms, rules and procedures required in a law office.

**STEP-BY-STEP GUIDANCE:** The Manual covers each major area of law practice.

**FORMS:** The Manual includes the major Judicial Council forms, plus typical attorney-drafted forms. *Sample forms are filled out* to illustrate common applications.

**UP-TO-DATE:** The Manual is updated twice a year to include revised Judicial Council forms and other changes in applicable rules and procedures.

1 Volume

LPI Members-Only Price: **\$191.10**

Nonmembers Price: **\$273**

Price includes shipping.

Updated biannually for subscribers  
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- Court Structure
- Civil Procedure
- Local Rules
- Discovery
- Unlawful Detainer
- Real Estate
- Criminal
- Family Law
- Adoptions

- Probate
- Conservatorships and Guardianships
- Corporations and Limited Liability Companies
- Bankruptcy
- Miscellaneous: Practice Tips; Service and Proof of Service; Fax Filings; Verifications; Substitution/Association of Counsel; Notarial Acknowledgments; Recording

Laws; Forms of Address; U.S. Postal Service Addressing Standards and State Code Abbreviations; Transcription and Proofreading; Alphabetic Filing Rules; Calendars; Legal Abbreviations and Jargon; Office Procedures; Reference Materials

- Glossary

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# OCTOBER FITNESS CHALLENGE

By Terralyn Graff



Greetings Members!

I hope you and your families are all staying safe and healthy. I am excited to announce our first fitness challenge. I have heard many of you say that “you were not moving as much as you used to”, “it’s easier to just grab ‘snacks’ at home”, or “I’m just not motivated”.....so during the month of October, we will be motivating and encouraging one another to move!

Everyone that signs up will receive the calendar with our daily exercise/moving goals, along with recipes for healthy meals and treats that will help you get closer to your fitness goals. These can be very different for everyone...some of us want to lose weight, some of us want to build muscle and some of us just want to move. Whatever it is that you are trying to accomplish, we will be here supporting and cheering one another on. The only thing you will be gaining is an opportunity to win fun prizes. 😊

This event is taking place from October 1st to October 31st and it’s only \$31.00 to participate...that’s just a dollar per day. This is such a great way to get us all motivated and moving all while making money for our beloved association. I can’t wait for us to all start this journey together!



## *CCLS Mini Quiz Answer Key (from pg. 27)*

| Reasoning and Ethics |        |                                                                                                          |
|----------------------|--------|----------------------------------------------------------------------------------------------------------|
| No.                  | Answer | Authority                                                                                                |
| 1.                   | B      | <i>Secretary of State, Notary Public Handbook</i>                                                        |
| Legal Computations   |        |                                                                                                          |
| 2.                   | C      | Defendant A Burden = \$192,000 (40% of total)<br>Defendant B Burden = \$9,600 (5% of Defendant A Burden) |
| Legal Terminology    |        |                                                                                                          |
| 3.                   | A      | <i>LSI Legal Professional’s Handbook, Ch. 4</i>                                                          |





## CALIFORNIA STATE COURT DISCOVERY

(formerly Overview of California State Court  
Discovery/Advanced Discovery)



LPI will be offering an online class on an Overview of California State Court Discovery. This class will be a six-week, work-at-your-own-pace online session commencing October 13, 2020 and ending November 17, 2020. During the classes, the following topics will be covered:

Interrogatories  
Demand for Production of Documents  
Requests for Admissions  
Depositions

Demand for Physical Examinations  
Deposition Subpoenas  
Discovery Timelines and Service  
Verifications

### CLASS SESSION OPENS TUESDAY, October 13, 2020

Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided a day or two before the class is scheduled to begin.

The content of this class is designed for legal secretaries and those studying for the California Certified Legal Secretary examination.

The cost of the class is \$125 for LPI members/\$175 for non-LPI members. Each individual must register separately. Upon completion of the class, students will receive an electronic certificate of completion from LPI.

### OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY CLASS REGISTRATION

(Please type or print clearly)

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

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

City/Zip: \_\_\_\_\_ Telephone: \_\_\_\_\_

\$125 LPI Member \_\_\_\_\_ Local LPI Association: \_\_\_\_\_ LSA/LPA  
\$175 Non-LPI Member \_\_\_\_\_  
(No abbreviations please; status is verified)

Online registration and payment available at:

<https://www.legalprofessionalsinc.org/events/>

Registration deadline is **NO LATER THAN** October 9, 2020. For further information or inquiries, email [lpchair@legalprofessionalsinc.org](mailto:lpchair@legalprofessionalsinc.org). No refunds after October 9, 2020. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study. CLE/MCLE credit is not available for this class.

**LPI – Educating California's Legal Professionals**





## BEGINNING LEGAL SECRETARIAL TRAINING CLASS



LPI will be offering its Beginning Legal Secretarial Training Class online. This class will be an eight-week, work-at-your-own-pace online session commencing October 13, 2020 and ending December 1, 2020. During the classes, the following topics will be covered:

|                                           |                                                |
|-------------------------------------------|------------------------------------------------|
| Introduction to the Law Office            | Service of Legal Documents                     |
| Duties of the Legal Secretary             | Preparing a Proper Caption                     |
| Effective Telephone Skills                | Preparation of Documents Filed with the Court  |
| Effective Oral Communication Skills       | Basics of Civil Litigation Interrogatories     |
| Calendaring and Timetables                | Demand for Production of Documents             |
| Basic Grammar Skills                      | Requests for Admissions                        |
| Transcription and Proofreading Techniques | Depositions/Deposition Subpoenas               |
| Court Structure                           | Demand for Physical Examinations               |
| Citations                                 | Discovery Timelines, Service and Verifications |

### CLASS SESSION OPENS ON TUESDAY, OCTOBER 13, 2020

Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided a day or two before the class is scheduled to begin.

The cost of the training class, which includes the Legal Secretary's Reference Guide, is \$180 for LPI members/\$250 for non-LPI members. Each individual must register separately. Upon completion of the class, students will receive an electronic certificate of completion from LPI.

### BEGINNING LEGAL SECRETARIAL TRAINING CLASS REGISTRATION

(Please type or print clearly)

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

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

City/Zip: \_\_\_\_\_ Telephone: \_\_\_\_\_

\$180 LPI Member \_\_\_\_\_ Local LPI Association: \_\_\_\_\_ LSA/LPA

\$250 Non-LPI Member \_\_\_\_\_ (No abbreviations please; status is verified)

**Online registration and payment available at:**

**<https://www.legalprofessionalsinc.org/events/>**

Registration deadline is **NO LATER THAN** 10:00 a.m. on October 9, 2020. For further information or inquiries, email [training@legalprofessionalsinc.org](mailto:training@legalprofessionalsinc.org). No refunds after October 13, 2020. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study. CLE/MCLE credit is not available for this class.

***LPI – Educating California's Legal Support Professionals***



*Civil Litigation*

## CIVIL CASE LIFE CYCLE

*Presented by Fredrick C. Crombie  
Partner at Coblenz Patch Duffy & Bass LP*

*October 15, 2020  
12 PM - 1 PM*

Members of ALL Six (6) Legal Specialization Sections (LSS) - FREE!

LPI Member/Local Association Member - \$15

Non-LPI Member or Attorney - \$30

The price increases \$5 after 10/1/20

Registration closes 10/8/20



Online registration and payment available at: <https://www.legalprofessionalsinc.org/events/> or **Click Here.**



The Legal Specialization Sections is a program of Legal Professionals, Inc., an approved provider, and certifies that this seminar has been approved for minimum continuing education credit in the amount of 1.0 hours by the State Bar of California.





# LPI

*Educating California's  
Legal Support Professionals*

PRESENTED BY:

**NextGen**  
→ Legal

## October Webinars

SAME GREAT EVENT CHOOSE THE TIME THAT WORKS BEST

**OCTOBER 28**

**12:00-1:00 PM**

**EX PARTE APPLICATIONS  
IN THE CALIFORNIA SUPERIOR COURT**  
MEMBER NON-MEMBER

☐ \$25 ☐ \$45

**OCTOBER 29**

**7:00-8:00 PM**

**EX PARTE APPLICATIONS  
IN THE CALIFORNIA SUPERIOR COURT**  
MEMBER NON-MEMBER

☐ \$25 ☐ \$45

**DEADLINE TO REGISTER OCTOBER 27**

MCLE CERTIFICATE REQUESTED:

☐ CCLS ☐ PARALEGAL ☐ ATTORNEY BAR NO. \_\_\_\_\_

**Online Registration and Payment  
(via check or credit card)**

**Available at:**

<https://www.legalprofessionalsinc.org/events>

**For group registration, please email**

**Cyndee Saucedo, CCLS at**

**lptchair@legalprofessionalsinc.org**

NO CANCELLATIONS OR REFUNDS  
ARE PROVIDED AFTER THE WEBINAR; HOWEVER, SHOULD A  
CANCELLATION OCCUR AT LEAST 48 HOURS BEFORE THE  
LIVE WEBINAR, LPI WILL ISSUE A FULL REFUND.

## LIST OF EVENTS

**OCTOBER 28**

**12:00-1:00**

**Ex Parte Applications  
in the California Superior Court**

This webinar will go over the process of ex parte applications in the California Superior Court. This presentation will provide you with a guide to prepare the application and supporting documents, filing, serving and preparing your attorney to attend the hearing.

**OCTOBER 29**

**7:00-8:00 PM**

**Ex Parte Applications  
in the California Superior Court**

This webinar will go over the process of ex parte applications in the California Superior Court. This presentation will provide you with a guide to prepare the application and supporting documents, filing, serving and preparing your attorney to attend the hearing.

NEXTGEN IS AN AFFILIATE OF LEGAL PROFESSIONALS, INCORPORATED, AN APPROVED PROVIDER, AND CERTIFIES THAT THIS ACTIVITY IS APPROVED FOR 1.0 HOURS OF CLE/CCLS CREDIT.



# LPI Webinar Series


NOVEMBER 5, 2020  
12:00 PM TO 1:00 PM

## California Business Record Subpoenas, including Notice to Consumer and Custodian Declarations

---

**SUBPOENA SERIES: 1**

Presented by:  
Jim Ayer of Titan Legal



- Members of ALL Six (6) Legal Specialization (LSS) - FREE!
- LPI Member/Local Association Member - \$45 to purchase all 4 subpoena webinars
- Non-LPI Member or Attorney - \$30 per webinar (\$90 to purchase all 4 subpoena webinars)
- The price increases \$5 after 10.22.2020
- Registration closes 10.29.2020

*Purchase All Four and Get*

Online registration and payment available at <https://www.legalprofessionalsinc.org> or Click [Here](#).


NOVEMBER 12, 2020  
12:00 PM TO 1:00 PM

## Deposition Appearance Subpoenas for California, including Trial Subpoenas

---

**SUBPOENA SERIES: 2**

Presented by:  
Jim Ayer of Titan Legal



- Members of ALL Six (6) Legal Specialization (LSS) - FREE!
- LPI Member/Local Association Member - \$45 to purchase all 4 subpoena webinars
- Non-LPI Member or Attorney - \$30 per webinar (\$90 to purchase all 4 subpoena webinars)
- The price increases \$5 after 10.29.2020
- Registration closes 11.05.2020

*Purchase All Four and Get*

Online registration and payment available at <https://www.legalprofessionalsinc.org> or Click [Here](#).


NOVEMBER 19, 2020  
12:00 PM TO 1:00 PM

## Federal Court Subpoenas

---

**SUBPOENA SERIES: 3**

Presented by:  
Jim Ayer of Titan Legal



- Members of ALL Six (6) Legal Specialization (LSS) - FREE!
- LPI Member/Local Association Member - \$45 to purchase all 4 subpoena webinars
- Non-LPI Member or Attorney - \$30 per webinar (\$90 to purchase all 4 subpoena webinars)
- The price increases \$5 after 11.05.2020
- Registration closes 11.12.2020

*Purchase All Four and Get*

Online registration and payment available at <https://www.legalprofessionalsinc.org> or Click [Here](#).


DECEMBER 3, 2020  
12:00 PM TO 1:00 PM

## Foreign Subpoenas

---

**SUBPOENA SERIES: 4**

Presented by:  
Maurice Robert Archell of Nationwide Legal



- Members of ALL Six (6) Legal Specialization (LSS) - FREE!
- LPI Member/Local Association Member - \$45 to purchase all 4 subpoena webinars
- Non-LPI Member or Attorney - \$30 per webinar (\$90 to purchase all 4 subpoena webinars)
- The price increases \$5 after 11.19.2020
- Registration closes 11.26.2020

*Purchase All Four and Get*

Online registration and payment available at <https://www.legalprofessionalsinc.org> or Click [Here](#).

## Subpoena Learning Series 1-4:

1. California Business Records, Notice to Consumer & Custodian Declarations - November 5, 2020
2. Deposition Appearance including Trial Subpoena - November 12, 2020
3. Federal Court Subpoenas - November 19, 2020
4. Foreign Subpoenas - December 3, 2020

To learn more or to register for this learning series, go to the LPI website at <https://www.legalprofessionalsinc.org/events/> - click on the Events tab.



## 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 [www.sflpa.org](http://www.sflpa.org).

Please fill out the following application, sign it and submit it to your sponsor along with a check for \$65.00 made payable to SFLPA. This payment covers a one-time initiation fee and your first year<sup>1</sup> of annual membership dues for Legal Professionals, Incorporated (LPI).<sup>2</sup> 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 and 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 outside SFLPA or LPI without your consent.]                    | Wk Ph: _____ How long? _____                                                                                                                   |
|                                                                                                                        | Contact Preference: <input type="checkbox"/> Home <input type="checkbox"/> Business                                                            |
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|                                                                                                                        | How long? _____                                                                                                                                |
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|                                                                                                                        | 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: _____                                                                                                                   |

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<sup>1</sup> For fiscal year beginning the previous May 1st through April 30. Applications accepted after March 1 will have dues pro-rated.  
<sup>2</sup> Accompanying membership in LPI, a California non-profit mutual benefit association, includes subscription to *The Legal Secretary* magazine published quarterly, discounted prices on LPI publications such as *The Legal Professional's Handbook* and *The Law Office Procedures Manual* and more. Visit <http://https://www.legalprofessionalsinc.org/> for more details.



IF I AM ACCEPTED AS A MEMBER, I AGREE TO BE BOUND BY THE BYLAWS AND STANDING RULES OF LEGAL PROFESSIONALS, 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 PROFESSIONALS, 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. "*

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To be completed by SFLPA Officer:

Approved by Board on: \_\_\_\_\_ Initials: \_\_\_\_\_ Date Initiated: \_\_\_\_\_

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.

An application for active membership may be presented to the Membership Chairperson only after a prospective member has attended one function of this Association, or a seminar or workshop presented by LPI or the Bay Area Legal Forum. The application shall be presented in writing on the form prescribed by LPI 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 LPI, 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.



**Attorney Marc Siegel, Esq. teaching a class at the 2019 Quarterly Conference hosted by San Francisco LPA**





## San Francisco Legal Professionals Association ("SFLPA")

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

### **APPLICATION FOR ASSOCIATE MEMBERSHIP (SFLPA and LPI)**

Please read the definition of an Associate Membership given on the following page of this application. If you have any questions regarding your application for Associate Membership, please ask your sponsor or any of the officers of this Association listed on our website at [www.sflpa.org](http://www.sflpa.org).

Please fill out this application, sign it and submit it to your sponsor along with a check for \$45.00 made payable to SFLPA.<sup>1</sup> **This payment covers a one-time initiation fee and your first year<sup>2</sup> of annual membership dues for Legal Professionals, Incorporated (LPI).**<sup>3</sup> 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: _____                                                                                                                              |
| Home Address: _____                                                                                                    | Employer: _____                                                                                                                                |
| City ST Zip: _____                                                                                                     | Address: _____                                                                                                                                 |
| Home Phone: _____ Cell: _____                                                                                          | City ST Zip: _____                                                                                                                             |
| Email: _____                                                                                                           | Email: _____                                                                                                                                   |
| [Note: Your contact information will not be distributed outside SFLPA or LPI without your consent.]                    | Work Phone: _____ How long? _____                                                                                                              |
|                                                                                                                        | Contact Preference: <input type="checkbox"/> Home <input type="checkbox"/> Business                                                            |
| SPONSORSHIP:                                                                                                           | FORMER EMPLOYMENT                                                                                                                              |
| Sponsor's Name: _____                                                                                                  | Former Employer: _____                                                                                                                         |
| How did you find out about SFLPA? _____                                                                                | City, State: _____                                                                                                                             |
| Why do you want to join SFLPA? _____                                                                                   | How long? _____                                                                                                                                |
|                                                                                                                        | Total Experience: Legal _____ Litigation: _____                                                                                                |
| Have you ever been a member of this Association or any others in the past? If so, when? _____                          | 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:

(CONTINUED NEXT PAGE)

<sup>1</sup> Payment can also be made by U.S. mail to the post office box listed above or by using an app called Venmo

<sup>2</sup> For fiscal year beginning the previous May 1st through April 30. Applications accepted after March 1 will have dues pro-rated.

<sup>3</sup> Accompanying membership in LPI, a California non-profit mutual benefit association, includes subscription to *The Legal Secretary* magazine published quarterly, educational webinars at a discounted rate or free to members of LPI, discounted prices on LPI publications such as *The Legal Professional's Handbook* and *The Law Office Procedures Manual* and more. Visit <http://https://www.legalprofessionalsinc.org/> for more details.

IF I AM ACCEPTED AS A MEMBER, I AGREE TO BE BOUND BY THE BYLAWS AND STANDING RULES OF LEGAL PROFESSIONALS, 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 PROFESSIONALS, 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: \_\_\_\_\_

**Associate Membership** may be granted to:

(1) Any person who has been licensed to practice law in this state for less than one year, or any person who has actively engaged in any one or a combination of, the following-named occupations for less than one year: secretary, 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 institution, including governmental offices or,

(2) Any person who is enrolled in a training course designed to lead to employment in the occupations described above.

(3) Any person formerly employed in any of the occupations described above, but who has had such employment interrupted.

An associate member shall have the right to vote on matters pertaining to this association but not to matters pertaining to LPI. An Associate member shall have the right to serve as a committee chair but shall not be eligible to hold office. An associate member defined in (d) (1) above shall be allowed to retain such status until they have been engaged in work of a legal nature as defined in (d)(1) above for one year. An associate member defined in (d)(2) above shall be allowed to retain such status for no more than one (1) year after completing the legal secretarial training course in which said associate member is enrolled. An associate member defined in (d)(3) above shall be allowed to retain such status until they have been engaged in work of a legal nature as defined in (d)(1) above for one year.

After meeting the employment requirements as set forth in 1(a) above and after the one year term of an associate member as defined in paragraphs (d)(1) (d)(2) and (d)(3) above expires, an associate member may become an active member by submitting an application for active membership, making payment of the annual dues in addition to the initiation fee of LPI, if any, and being approved by a majority vote of the members of the Board of Directors present at the meeting at which such application is considered.

**Application for Associate Membership.** An application for associate membership may be presented to the Membership Chair only after a prospective associate member has attended one function of this Association, or a seminar or workshop presented by LPI or the Bay Area Legal Forum. The application shall be presented in writing on the form prescribed by this Association and endorsed by a member in good standing. Such application shall be accompanied by the first year's dues and initiation fee, along with satisfactory proof that the applicant is eligible for associate membership. 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.



## San Francisco Legal Professionals Association

### MEMBERSHIP RENEWAL FORM For The Fiscal Year of May 1<sup>st</sup> Through April 30<sup>th</sup>

IT'S THAT TIME AGAIN! Please fill out the renewal form below and mail a hard copy along with your check for \$55.00 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 \$30.00 for your Legal Professionals, Inc.<sup>1</sup> 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](http://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:<br><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                            |
| Where do you prefer to receive Email?:                                                                                                                                                                                   |                                               | <input type="checkbox"/> Home                                                                                   | <input type="checkbox"/> Work                            |
| Please indicate your type of membership:<br><input type="checkbox"/> Active \$55.00 <input type="checkbox"/> Associate \$35.00 <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 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 [www.sflpa.org](http://www.sflpa.org). Thank you for your continued support as a member of the San Francisco Legal Professionals Association.

<sup>1</sup> Please note that "Legal Secretaries Inc." has changed its name to "Legal Professionals Inc." the new website address is: [www.legalprofessionalsinc.org](http://www.legalprofessionalsinc.org).





# Change of Address

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:**

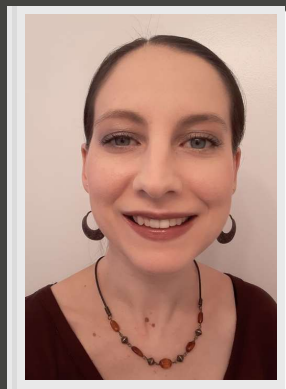
- ☐ Administrative
- ☐ Appeal
- ☐ Arbitration
- ☐ Business/Corporate
- ☐ Probate/Estate
- ☐ Taxation

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

\_\_\_\_\_  
\_\_\_\_\_

**Please submit to:**

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



# Message from Co-Editors

**Kate Cochran &  
Larry McGrew**



As we head into the holidays, we are excited and honored to present this special edition of the Hearsay—our first edition since July 2018. For many years, Hearsay was our go-to source for anything and everything we needed in the San Francisco Bay Area legal community. It helped us find a good reporter at the last minute when our lawyers called at 3 a.m. because they forgot to schedule a deposition! It helped us study for the CCLS...and encouraged us to get off our butts and actually sign up for the test! It gave us all the juicy details and awkward photos from conferences and crab feeds, to trivia nights and trainings, to keep us at the top of our game. Most importantly, it helped us create connections and build bridges together.

Now, more than ever, these connections and bridges are so important. We are living in, to quote the cheesy COVID commercials, uncertain times—but what is certain is that our community is special and uniquely positioned to weather this storm together, just as we always have done. Here in the Bay Area, we take great pride in our diverse community. Many of our members come from different cultures and heritages, and this melting-pot culture is what makes the San Francisco legal community so special. All of us—left, right, and center, hippie liberals in SF and conservative homeowners in the hills—have an opportunity to show who America truly is and move past the cynical divide-and-conquer tactics that threaten to destroy the greatest country in the world.

Just as we all have an essential role in making our voice heard as citizens, we all play a vital role in contributing to the SFLPA. Every member's contribution is important—we are grateful for you, and YOU are the reason the SFLPA is great! Our mission and vision for the Hearsay is to truly reflect the voices of all our members, and to respect and honor the diverse perspectives and experiences that make our community unique. We want to hear your stories about work, home, and work-from-home; your thoughts, fears, and dreams; and your ideas to make our community even better. Together, we can celebrate our successes and support each other when things don't go as planned. Together, we can find creative solutions to the rapidly changing landscape where law, technology, and current events intersect. While we can't predict what 2021 will bring... hell, we don't even know what November 2020 will look like!...we will continue to create connections and build bridges—together.



## LPI Code of Ethics

Members of LPI adhere to the LPI Code of Ethics which is dedicated to an LPI Past President, Joan M. Moore, PLS, CCLS, and reads as follows:

It shall be the duty of each member of Legal Professionals, 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.