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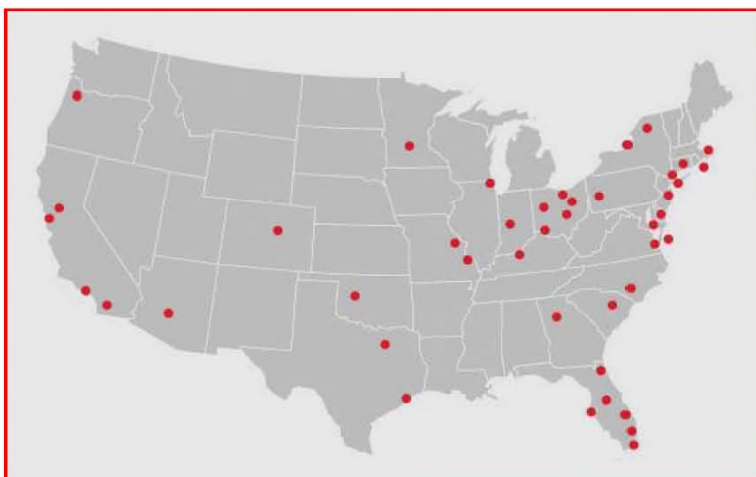
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July 2017 – President's Message



Greetings SFLPA Members & Friends,

I hope you are enjoying your summer so far... July marks the first opportunity that we have together as a membership to discuss plans and goals for the upcoming year. Our first General Membership Meeting for the year is scheduled for Tuesday, July 18, 2017. The meeting will be held at the offices of Jones Day San Francisco and our Guest Speaker: Marc Siegel, Esq., is also a partner of the firm.

As I previously has stated, we have some very exciting things on the horizon for this year. We are still looking for individuals to help us with some of our committees. I have not received any responses from our 'Wanted Ad' from last month, so I am going to leave it up for a while in hopes that we have some interested individuals that are willing to step up and help some of our committee chairmen.

We are still looking for someone with Legal Secretarial Training experience to join our Education Committee. We plan to bring back our 8 week Legal Secretarial Training program. If you know someone or if you are interested, please contact our Education Chair, Frances Skaggs.

Just a friendly reminder that the LSI conferences are a great opportunity for to meet your peers throughout the state. It's also a great way to learn about this corporation, participate in educational events and have lots of fun too. Here is list of the upcoming conferences:

- LSI Conferences:
 - Quarterly Conference – August 18-20, 2017 at the Stockton Hilton
 - Quarterly Conference – November 10-12, 2017 at the Lions Gate Hotel & Conference Center in Sacramento
 - Quarterly Conference – February 23-25, 2018 at Knott's Berry Farm in Buena Park
 - 84th Annual Conference – May 17-20, 2018 at the Beverly Garland Hotel in North Hollywood

Our June Brown Bag was a very well attended event. Our speaker: Ana Fatima Costa gave an excellent presentation on handling negative relations in the workplace. We thank Ms. Costa for her time and willingness to give a free 30 minute session to a lucky winner who attended the event. Our next Brown Bag Presentation is:

- July 25, 2017 – Jeff Knowles, Esq., of Coblentz, Patch, Duffy & Bass, LLP will present: "IP Litigation: Why it's so Important to Protect What Your Mind Creates!"

Stay tuned for more information as we hope to release our calendar of events scheduled through December of 2017 in the upcoming weeks. I hope you all enjoyed your 4th of July Holiday Festivities. Enjoy the remainder of your summer and we hope to see you at a SFLPA event in the near future.

Respectfully,
Larry McGrew
President



Do you enjoy helping others?

We are looking for a few individuals that enjoy the rewards of volunteer work. There are a number of committees within the SFLPA that could use some assistance.

Please review the committee list as well as the job description. If you find one that interests you, please contact the appropriate committee chair.

Bay Area Legal Forum: Looking for up to 5 members to serve on the forum's planning team. The BALF hosts educational events throughout the calendar year. The most popular is the Annual Changes in the Law which is presented each January and covers recent changes in civil, family, corporate, and estate planning/probate law. Depending upon the number of changes, additional information regarding federal or appellate law changes may also be presented. Chair currently vacant.

California Certified Legal Secretary: Promotes the CCLS program established and administered by LSI. The Chair shall organize and conduct a study program to assist those interested in obtaining such certification. Chair currently vacant.

Career Promotion/Scholarship: Encourage participation in scholarship programs offered through LSI and SFLPA. This committee shall present the names of students eligible to be placed in competition in the scholarship program to the Board for approval. Chair: Aubrey Miller – alm@sommerschwartz.com

Education: Responsible for the preparation and presentation of educational programs designed to assist those employed or interested in the legal secretarial field. Chair: Frances Skaggs – franceskaggs@gmail.com

Employment: Assist members to obtaining employment by distributing employment opportunities made available to the SFLPA. Chair: Suddie Scott – sscott5204@yahoo.com

Historian: Prepares a history book which shall conform to the rules established by LSI. The book is provided to the President at the end of the fiscal year. Chair: Chris Flores – cflores@orrick.com

Interclub: Encourage the exchange of ideas for the advancement of this Association in the community, visit neighboring Legal Secretaries Association and represent this association at meetings of other organization whose ideals and purposes are compatible with those of this association. Chair: Sue Hammer – shammer@firstlegal.com

Legal Procedures: Must be employed in the work of a legal nature. Shall devise and recommend means of educating members in the use of legal forms and procedures and disseminate information relative to new forms and procedures. Chair: Ryan Halog – rhalog@hotmail.com

Membership: Stimulate interest in membership by presenting the advantages of such membership to prospective members and the legal community. This committee shall also disseminate information to the membership about the credit union, the insurance program and other benefits available to members through LSI. The chair shall present to the Board of Directors at a regularly scheduled meeting the applications of those who have the necessary qualifications for active and associate membership. Chair: Carol Romo – cromo@crowell.com

Marketing/Public Relations: Shall have charge of all newspaper, radio, television and other publicity in connection with activities of this association. All publicity involving LSI shall be cleared with the LSI President pursuant to Brass Tacks prior to submission. Chair: Anthony Tang – anthony.tang@e-arc.com

Professional Liaison/Day in Court: Shall promote harmonious relations and cooperation with various organizations of the legal profession. This committee shall prepare for and present a Day in Court program. Chair: Lilian Wong – lwong@JonesDay.com

Program: Shall arrange for speakers, entertainment and restaurants for regular membership meetings and for such special programs as the President or the Board of Directors shall direct. This committee shall take reservations and provide a list of thereof to the Vice President and Treasurer. Chair: Terralyn Graff – terralyng@barkley.com

Ways & Means: Shall have charge of and sole responsibility for all fund raising activities of this Association. Chair: Shannon Thompson – shannon.thompson@behmke.com

Website Maintenance: Shall work with the Association's webmaster to distribute timely and pertinent information regarding the Association's activities and other items of interest through the Association website. Chair: Ryan Halog – rhalog@hotmail.com

If anyone is interested in any of the above, please contact the committee chairman. If you are interested in a position that is vacant, please contact Larry McGrew – lmcgrew@firstlegal.com.

Also, we are looking for a qualified individual that specialize in training legal professionals. We have plans to provide an 8 week Legal Secretarial Training Course.

Vice President's Message

By: Carol Romo

From your VEEP . . .

Can you believe it's July already????

For me and the Membership Committee (Lillian Wong, Malou Sana and Karen Hurtado) this will be a month of planning, planning, and more planning. This fiscal year, we have set our sights on attaining at least one legal secretary (or the like), new member from at least fifty law firms in San Francisco. That's right, we plan to recruit fifty new legal secretary members from the many world renown law firms that happen to be in our own back yard. How lucky we are to have this kind of resource! And, while I know it seems like a lofty goal, I believe with the help of all of you, we can do it. Here's how and why:

Our first Membership Drive event is scheduled for Thursday, August 24, 2017 from 6:00 to 8:00 pm. We will be featuring what we hope to be our First Annual Open House. There will be an LSI/SFLPA marketing table with procedural reference publications and legal section educational programs. We will also have information about our upcoming Legal Secretary Training Workshop, special guest speaker night, a mock trial and private tour of San Francisco Superior Court that our Day-In-Court Chair, Lillian Wong, is planning, as well as information about upcoming FUNdraisers being planned for this fiscal year.

The Open House will also feature a local nail salon booth and a professional make-up booth sponsored by local vendors. There will be music, wine & beer, cheese, crackers, etc. and a brief PowerPoint presentation by one of our own SFLPA Officers and a representative from LSI to give a little talk about why joining our Association is a win-win situation. We will also be drawing a door prize for one of our guests.

Very soon, I will be personally reaching out to members like you and ask you to please make this drive successful by planning to attend and bringing with you a fellow legal secretary, paralegal or attorney support staff member from any of our San Francisco law firms to attend our Open House as your personal guest. There will be no cost to you or your guest and as the name Open House suggests, you can come and go at any time during the two-hour period we have scheduled for this event, So, please – pretty please – start thinking of someone you would like to have go with you, hopefully, as a fellow member, to a variety of upcoming *new* and annual events and programs in store for you courtesy of Legal Secretaries Incorporated and San Francisco Legal Professionals Association. Until next time, stay cool!

Carol Romo

Vice President ("Veep") and Membership Committee Chair, 2017-18

By: Ryan Halog

July 2017

CYBERSECURITY

The following article is being published with written permission from Giulia Foss, Senior Marketing Executive at Tikit, Brunel University London, London, U.K., and was republished with authority from Alvin Tedjamulia, NetDocument's CIO and an original co-founder. He frequently writes and speaks on topics of DMS security and world-class software-as-a-service and security-as-a-service delivery.

Law Journal Newsletters – “Client Document Security Audits: Is Your Law Firm Ready?”

June 20, 2017 – Recent high-profile data breaches at law firms have led companies to increase scrutiny of their outside counsels' cybersecurity “readiness.” International banks, major corporations, and government agencies are increasingly vetting the internal controls and security practices of legal document systems and requiring extensive disclosures on compliance and information governance practices. It is essential for all law firms, however, to safeguard their clients' documents against ever-evolving threats and thoroughly understand the security challenges and potential solutions in today's demanding world of legal document compliance.

Client-driven security audits focused on such document security issues are causing sleepless “CIO” nights. This article not only focuses on some of these issues, but also the solutions available from modern cloud technologies.

- **Encryption Requirements**

Considering the advances in cryptography in modern Document Management Systems (DMS) and clients' increased demand for encryption to secure their documents, it would be irresponsible for law firms to continue storing and moving documents in internal networks in clear text format. Encryption at Rest Sensitive client information is at risk when it is left unencrypted at rest (that is, in storage). Surprisingly, many law firms today still have not implemented basic at-rest encryption in their traditional DMS due to cost, complexity, and lack of native support for encryption in traditional systems.

A limited number of firms have implemented this kind of encryption in a traditional, on-premises DMS. Many of these implementations, however, are based on ineffective hardware encryption methodologies (self-encrypting disks) or file system encryption. These methods are inadequate not only because they do not protect data from internal IT staff, but also because all internal network traffic between the DMS and the storage remains in clear text.

Many clients now require their law firms to store cryptographic keys in a Hardware Security Module (HSM), which is a purpose-built, advanced security container for cypher key storage. Major banks are not only encouraging HSM cryptography, but also requesting that the HSM be accredited to the Federal Information Processing Standard called FIPS 140-2 Level 3 with tamper detection circuitry.

Law firms should be aware that modern document systems today do provide HSM-based encryption with tamper detection circuitry for full encryption at-rest and in-transit within the internal network, capable of satisfying the strictest regulations.

- **Granular Cryptography**

Instead of having a single crypto key for all content, a secure environment has a unique key per matter and per specific time, implemented through key rotation. Granular cryptography protects against the risk of a total security breach should a single crypto key be compromised. Modern document technologies can provide law firms with granular cryptography supporting a unique AES-256 crypto key per document, which is further encrypted by a unique key per matter, and another unique key per period.

- **Entropic Encryption**

Encryption strength is critical in defending against attacks by nations. Government-sponsored hacks have prodigious computing power and are easily able to break into documents with weak encryption keys via brute-force trial and error. Secure cloud technologies provide entropic encryption using quantum physics technology for randomization as a main defense against such threats, satisfying the highest security standards. Case in point, NIST (National Institute of Standards & Technology) strongly recommends against generating encryption keys via weak software algorithms (referred to as pseudo-random number generators). Instead, NIST urges the use of strong technologies that rely on random, entropic natural phenomena, such as the photons in a laser beam.

- **Custody over Cryptographic Keys**

International banks are demanding that firms obtain custody over encryption keys to stop their service providers from disclosing documents upon receipt of a subpoena. Furthermore, banks and other companies will soon want custody over such encryption keys themselves. “Silent subpoenas” issued against the service provider represent the greatest risk. They mandate document production and prohibit the service provider from disclosing the silent subpoena to the client. Cloud technology has evolved to the level of dual encryption custody, in which two separate organizations hold a unique entropic cypher key (or half of the key), requiring both organizations to work cooperatively to respond to subpoenas, rendering unilateral actions impotent.

- **Perimeter Defense**

Perimeter defense must encompass distributed denial of service (DDoS), Web application firewalls (WAF), threat management gateways (for IPS and IDS protection), strong security policies, and best practices for managing ingress. The presence of a simple firewall is not enough. DDoS, for example, is a complex problem. Facing an average DDoS attack intensity of 48 gigabits per second, an Internet line of only 1 gigabit per second will be flooded with “garbage” beyond the ability of the DDoS technology to inspect the Internet packets. The inadequacy of most firms to have adequate perimeter defense is a serious concern. Fortunately, modern cloud DMS services are well equipped for DDoS and perimeter defenses.

- **‘Protection Against Self’ and End Users**

The highest level of risk in any organization is posed by its own internal staff. Wall Street firms are increasingly asking law firms to eliminate the risk of their internal staff, especially IT staff having indiscriminate access to the firm’s documents. This requirement of “protection against self” will be more pervasive soon. Mitigation practices, such as segregation of duties and “need to know basis,” can help. These minimize the risk of internal nefarious actions that require collusion among multiple people.

For classified documents, however, segregation of duties is not good enough, and clients are increasingly requesting complete protection against internal staff acting under collusion. Law firms must anticipate this upcoming security standard and realize the near impossibility of implementing such protection on their own. How do you effectively protect against yourself if you are in control of the system? A viable solution for protection against the firm’s own IT staff is to deploy a technology with multi-custody entropic cryptography.

For mobile device document editing, security restrictions must be permitted for Microsoft Office applications to directly read and write files to the document management system, thereby eliminating the security risk of having documents locally stored, even temporarily, on tablets or phones, or on Microsoft OneDrive or Google Drive.

Underpinning this is clients' expectations that outside counsel adopt a pessimistic security model for document access control, restricting every user to accessing only those matters that he/she is working on or those within a practice group.

- **Conclusion**

Law firms and corporate legal departments are under significant pressure to do more with less and to be more agile with their technologies. Such pressures are even more evident when it comes to security and compliance so having a beyond base knowledge of threats and potential technology solutions afforded by most modern DMS systems is paramount.



CALENDARING

It's Time to Review Your Calendar System



Missed deadlines caused by failure to properly calendar matters are the most significant cause of malpractice claims against attorneys. Without a good docket control system, even the most knowledgeable practitioner may miss a deadline or not have enough time to properly prepare. Is your system up to the task?

A basic calendar and docket control system should have these three components:

1. **A “master” calendar.** All activity associated with client matters is entered on the master calendar that includes all deadlines, court appearances, and other dates associated with litigation, such as statute of limitations filing deadlines (entered in red or another bright color); due dates for filing pleadings or other documents; discovery deadlines and due dates; and expiration dates for judgments requiring renewal. There should be only one master calendar for the entire office. It is very important that a specific individual be designated to calendar matters in the master calendar. Each attorney should also review dates calendared and add any necessary additional dates.
2. **Secondary calendars.** Each attorney should have a secondary calendar that he/she reviews daily and updates with his/her matters that have been added to the master calendar. The attorney may also include appointments and other professional matters requiring attention. As

the name implies, a secondary calendar serves as a backup to the master calendar and allows the individual attorney to focus on matters for which he/she is responsible.

3. A **“tickler” system**. There should also be a “tickler” system that is tied to the master calendar that gives those responsible for specific tasks adequate time to perform them. It should also be designed to ensure that files are reviewed on a regular basis so that no file or required task is overlooked. Some law offices also use the tickler system to remind the attorney responsible to report regularly to clients on the progress of the case.

Not only is a good docket control system important to avoiding serious losses to your clients, but it will give you substantial peace of mind. You can get even more peace of mind by following the guidance on many other office procedures in CEB’s [California Civil Procedure Before Trial](#), ch. 1.

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LEGAL ETHICS

Does an Ethical Breach Bar an Attorney from Getting Fees?



The short answer: Yes, under California law, an attorney’s ethical breach of duty may disqualify that attorney from all or part of a fee award. But there is a possible exception.

Like all other aspects of the practice of law, fee awards are subject to ethical considerations. When an attorney violates his/her ethical duties to the client and is disqualified for a conflict of interest, the attorney generally is not entitled to a fee for his/her services. See *Cal Pak Delivery, Inc. v. United Parcel Serv.* (1997) 52 Cal.App.4th 1, 15, and cases cited. In addition, fees have been denied when the attorney’s relations with the client were tainted with fraud. (*Clark v. Millsap* (1926) 197 Cal. 765, 785.)

But fees may be allowed in disqualification cases when—

- there’s no objection by the client, and
- the services were rendered before the ethical breach.

In the *Cal Pak* case, the attorney had worked for three years before offering to sell out his client and the class his client was representing for payment to himself personally of \$8-10 million. The court of appeal held that the attorney might be entitled to fees for the work performed during those three years, especially because the client

was not objecting to possible attorney fees, and because the effect of the attorney's labors was not yet clear at the present stage of the litigation, before the class was even certified.

Other cases have made similar assessments: In *Mardirossian & Assocs., Inc. v. Ersoff* (2007) 153 Cal.App.4th 257, 279, a technical violation of Cal. Rules of Prof. Cond., rule 3–310, did not preclude recovery of quantum meruit fee because the client was not prejudiced; in *U.S. ex rel Virani v. Jerry M. Lewis Truck Parts & Equip., Inc.* (9th Cir. 1996) 89 F.3d 574, 580, the court held that, under California law, if a fee agreement is tainted by impropriety, the courts may refuse to enforce the agreement, but allow the attorney to recover the reasonable value of services.

Although it is good to know about the exception, the rule is paramount: Violate your ethical duties and you likely will not get paid for your work (in addition to any disciplinary or other repercussions).

Litigate attorney fee awards with confidence using CEB's [California Attorney Fee Awards](#), a comprehensive and nuanced guide that's authored by recognized authority Richard M. Pearl. And keep up developments involving some of the key ethical rules in CEB's program [Recent Developments in California Legal Ethics 2016](#), available On Demand.

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TRUST ACCOUNT

Trust Account Misuse Alone Isn't Money Laundering, Court Says

June 15, 2017 – A disbarred New Jersey lawyer accused of helping himself to large sums of client funds has succeeded in defeating one of the most serious charges against him – and in the process prompted an appeals court to shed some light on how the money laundering statute applies to attorney account misuse.

The Appellate Division said evidence that Joseph Talafous Jr. used his trust and business accounts to facilitate the alleged thefts by itself did not support the charge of money laundering – the only first-degree offense among the 19 counts with which he is charged.

“The State presented no evidence that the theft was concealed (as opposed to committed) through placement of the money in defendant's accounts,” the Appellate Division said Tuesday in *State v. Talafous*.

“The money laundering statute is intended to be construed broadly to serve its purposes,” the court added. “However, it requires proof of something more than an underlying crime.”

Though unpublished, “I think it's an important case in the development of money laundering [law],” said Talafous' lawyer, Gerald Miller of Miller, Meyerson & Corbo in Jersey City.

“I think it's important in that area of law when you're dealing with trust accounts,” Miller added, noting that attorney trust account misuse commonly leads to a money laundering charge.

Representing the state was Deputy Attorney General Joseph Glyn. Office spokesman Peter Aseltine said in a statement: “We're considering our options with respect to the dismissed charge, which was one of 19 counts against Talafous in the indictment. Ultimately, we're prepared to move forward with our major theft case against Talafous.”

Talafous, 55, is accused of stealing six-digit sums from numerous clients. He was a Jersey City solo before his disbarment by consent in 2015—based on a charge of knowing misappropriation of client funds. He has disputed the allegations in the criminal case, however.

Talafous was indicted last year. In addition to money laundering, he was charged with second-degree theft charges, among others, according to the court's decision Tuesday.

Talafous pleaded not guilty; the matter proceeded through discovery and motion practice, and efforts to have other counts dismissed were unsuccessful, according to Miller.

But Hudson County Superior Court Judge Mitzy Galis-Menendez granted Talafous' motion to dismiss the money laundering charge, holding that there was no subsequent crime to theft when Talafous allegedly put client funds in his accounts and later withdrew them for his own use. The state appealed.

In the ruling, Appellate Division Judges Susan Reisner and Jessica Mayer said some of the alleged transfers to Talafous' trust account was inappropriate, or amounted to theft, but prosecutors "failed to present evidence that he laundered the funds in any of the cases."

In one case, Talafous is charged with using a power of attorney regarding an incapacitated client to improperly transfer funds to his trust or business account, then using them for himself. He is also charged with taking \$400,000 from a minor's settlement proceeds, and \$316,000 from a client estate, and, again, transferring those to his trust and business accounts, and later using the money for himself.

"The State argues that defendant engaged in two transactions, because when he stole the money from his clients' estate or trust accounts, he placed the funds in his attorney trust or business accounts 'to give the stolen money an air of legitimacy,'" the appeals court said in the per curiam decision.

"However, the State produced no evidence before the Grand Jury to establish that putting money in either account served to 'conceal or disguise the nature, location, source, ownership or control of the property derived from criminal activity,'" the panel added, quoting language from the money laundering statute.

The court noted that members of the grand jury asked two clarifying questions on the money laundering charge, and "the prosecutor did not answer the questions, other than by referring to the statute in general terms and telling the jurors to read the indictment."

The allegedly stolen sums cited in the opinion add up to \$1.46 million.

Miller said he expects a trial date to be set soon.

Asked about the allegations themselves, Miller said of Talafous: "He denies it, and we're ready to go to trial."

If you have questions, please contact David Gialanella at dgialanella@alm.com; on Twitter: [@dgialanellanjli](https://twitter.com/dgialanellanjli).



HEALTH

5 Tips to Kicking Your Soda Habit



Setting goals, finding healthy alternatives are key.

Sparkling water without sugar or sweeteners can be a healthier alternative to soda.

Numerous studies on the health issues surrounding both diet and regular soda have linked the beverages to obesity, diabetes, tooth decay and [greater risk of stroke and dementia](#). But kicking the habit can be hard, so here are some tips on how to wean yourself off those beverages:

- Give yourself a goal each morning and keep it at the forefront of your mind, dietitian Christy Brissette writes in the *Washington Post*. Write down your wish to quit soda on a sticky note, and leave it on your computer, wallet, or fridge as a helpful reminder to meet that goal every day.
- If the siren of the office vending machine starts to call your name during the afternoon slump time, try [boosting your energy](#) with a new routine rather than reaching for a can of the fizzy stuff. This could include having a healthy snack on hand or going for a walk.
- Take it slow. Do not feel pressure to go cold turkey; simply reduce your intake by half at first, and cut back a little more each week. You can reward yourself with a treat for meeting your goals as extra incentive.
- First try switching to caffeine-free soda, Barry Popkin, Director of the University of North Carolina Interdisciplinary Obesity Program, tells WebMD. Caffeine is mildly addictive, which is part of the reason soda is so hard to quit. So, gradually decrease your caffeine intake each day. “It takes a few weeks to truly forget the craving,” Popkin says.
- Try soda alternatives. Sparkling water [without sugar and sweeteners](#) can be a healthy carbonated drink alternative. If you simply need more flavor, try to spice up your water naturally by infusing it with fruit, cucumber, or fresh herbs. Tea also can be a healthy choice.

Bonus Tip: If you drink regular soda, try to [calculate how much exercise](#) you would need to work those calories off. For a 2014 Johns Hopkins University study, researchers put signs in stores stating that the calories in a 20-ounce bottle of soda takes 5 miles of walking, or 50 minutes of jogging, to burn off. The study found that teenagers were more likely to buy a smaller soda, a water, or no drink at all after reading the signs.



TRAVEL TIPS

How to Get a Refund on a Non-Refundable Flight



Non-refundable airfares are much cheaper than refundable ones, but if you cancel or change your flight, you will pay a hefty fee. But there are some loopholes and workarounds.

If you are booking an airfare in the United States, the U.S. Department of Transportation [regulations require](#) that, as long as you have booked a non-refundable ticket seven days ahead of your flight, you are entitled to hold your reservation and the fare and change or cancel your reservation within 24 hours of booking, without paying a cancellation fee (typically \$200 on the remaining large “network” carriers for a domestic fare, but much more (up to \$450 for some international fares), a bit less on other airlines, [as this chart shows](#).

You can either cancel the reservation entirely, or change it, within the 24-hour window. If you change it, however, a fare difference may apply, but there is no change penalty. This applies not just to the U.S.-based airlines, but any airline selling airfares in the United States.

You still should *pay* for the airfare, and then get a refund without penalty, except that **American Airlines** is a bit different in that it allows you to hold your seat and the fare for 24 hours *without paying for it*. On American, you should NOT pay for the fare, but merely choose the 24-hour hold option without payment. If you pay for the fare rather than holding it, you *will* be hit with a change/cancel fee on American! Also, American [sells fare “add-ons”](#) starting at \$68 roundtrip that allow you to change your flight for free at any time, and the add-on includes a checked bag round-trip and priority boarding. Something to consider.

Southwest Airlines lets you change or cancel a fare within the 24-hour window without penalty, but it also allows you to change or cancel a reservation any time before flight time and get a credit for the full amount of your fare, applicable to future travel within a year of the original reservation. You will have to pay any applicable fare increase, however.

Alaska Airlines [now allows](#) free changes/cancels if *made at least 60 days* prior to travel.

Allegiant Airlines is a bit more specific, stating in its rules that you may cancel if your scheduled flight is *at least 168 hours* (24 x 7) away at time of booking.

To take advantage of the 24-hour cancel or change rule, it is best to book directly with airlines, either online or by phone, rather than through third-party websites.

And it goes without saying that you can cancel a fully refundable ticket anytime and get a refund, although if you change rather than cancel there may be a fare difference if the fare has changed.

Frequent Flyer Award Tickets, Too?

Does this apply to frequent flyer tickets? For some customers, they have been able to cancel frequent flyer reservations within 24 hours of booking, and get all fees refunded and miles re-instated without penalty, most recently on British Airways; however, the DOT rules are unclear on this, and US Airways [clearly states](#) that the 24-hour cancel rule does not apply to frequent flyer tickets.

Other Ways to Get a Refund

One more thing: many people do not realize that in airline contracts of carriage, there is a rule (often called Rule 260) about “**involuntary refunds**.” Basically, it states that if the airline refuses to carry you for any reason, or if your flight is delayed more than a specified amount of time (for example, 121 minutes or greater on American Airlines) or the flight is canceled, you can apply for a full refund, even on a non-refundable ticket. Here, for example, is [Hawaiian Airlines’ Rule 260](#). United calls their rule on this something else, which you can see by [wading through their contract of carriage](#).

So, let us say you buy a fare you no longer can use, and the DOT 24-hour rule does not apply. You can avoid the change/cancel fee – if your flight is canceled or severely delayed. It may or may not be worth your time to show up for your flight and pray it is canceled or significantly delayed (you *do* have to check in for the flight).

The Schedule Change Loophole

And you can also get a refund – if there is a **significant schedule change before** your departure (let us say they change you from a 9 a.m. departure to a 6 a.m., or your new flight requires a much longer layover or an overnight stay, or even from a non-stop to a connecting flight). [Here, for example, are the rules on this from American Airlines](#) (this information is provided for travel agents, but applies no matter how the fare is booked). The airline may not notify you of a qualifying schedule change, so if you have purchased a non-refundable fare that you would like to refund, be sure to check the flight schedule to see if it has changed in any way and, if it has, call the airline and request a refund, explaining that the schedule no longer works for you (obviously, a change of just a few minutes will not qualify).



TRAVEL – SECURITY

The following articles was written by Tim Winship who has 20 years working in the travel industry, and 15 years writing about it, and knows a thing or two about travel. You may follow him on Twitter [@twinship](#).

Is TSA Missing 95% of Banned Items at Security?

July 5, 2017 – If you packed a firearm, a hand grenade, or boxcutters to go through a TSA airport-security checkpoint, you might have been able to relax: There is a 95 percent chance the TSA would have failed to discover the contraband. That is right, the TSA’s success rate in detecting banned carry-on items was found to be a *paltry* five percent.

Those were the results of a recent test of the TSA’s security-screening operation at Minneapolis-St. Paul airport, conducted by the TSA itself. According to [Fox9 Minneapolis-St. Paul](#), agents posing as passengers were successful 17 out of 18 times in sneaking explosives, weapons, and drugs past security screeners.

The report notes that in April 2016, a similar test of the TSA’s Minneapolis security operation found that screeners failed to identify nine out of 12 banned items.

Of course, it is unclear whether and to what extent those results can be extrapolated to other U.S. airports. But the TSA’s procedures at Minneapolis-St. Paul should be the same as its procedures at JFK, and LAX, and Atlanta, and Chicago, and so on. If the failure rate was 95 percent at Minneapolis, there is no obvious reason to expect a significantly different result at other airports.

Travelers endure the inconvenience, discomfort, and lost time in security screening lines on the assumption that their forbearance is in the service of a greater good: **enhanced security**. To find that the promised security is more illusory than real is troubling at best, infuriating at worst.

The traveling public has a right to know how the TSA is performing its principal task, that of keeping air transportation safe. No doubt the TSA is uncomfortable having its poor performance brought to the public's attention. In fact, what is needed is more transparency, not less. A first step might be to have the TSA's success rate in identifying banned materials *regularly monitored* by an independent agency, and the results made public.

Until then, air travelers have every reason to wonder just how safe the skies really are.

Four Airlines See Laptop Ban Lifted

July 6, 2017 – That laptop ban that has been the subject of so much debate and hand-wringing? It is making a slow fade into oblivion.

Today, [Qatar Airways](#) announced it had been approved by the U.S. Department of Homeland Security (DHS) to allow passengers to resume carrying onboard their personal electronics devices when flying to the U.S. from the carrier's Doha hub at Hamad International Airport.

Qatar is the fourth airline to receive the DHS's blessings to allow U.S.-bound flyers to bring their laptops and other devices with them into the passenger cabin. The three carriers already approved include Abu Dhabi-based Etihad, Dubai-based Emirates, and Istanbul-based Turkish Airlines.

The ban, initially covering nonstop flights to the U.S. from 10 Middle East airports, was imposed in March, presumably in response to intelligence suggesting that terrorists planned to hide explosives in the personal electronics devices of flyers traveling to the U.S.

The ban remains in place for nonstop flights to the U.S. from six airports: Amman, Jordan; Kuwait City; Cairo; Jeddah and Riyadh, Saudi Arabia; and Casablanca, Morocco.

Although as yet unconfirmed by the U.S. security officials, [Saudia](#), the flag carrier of Saudi Arabia, said it expects Jeddah and Riyadh to meet DHS screening standards and be excluded from the ban "on or before July 19."

The ban itself remains the object of considerable controversy, with critics lambasting the policy as neither necessary, nor effective. It has been pointed out that terrorists can easily avoid the ban by utilizing connecting flight to the U.S., rather than flying on the restricted nonstops.

With the affected airlines and airports rushing to upgrade their security screening to meet DHS requirements, the controversy and the criticism may soon be moot, which means more comfort and convenience, if not more security.

TRAVEL – BOOKING STRATEGY

When Should You Buy Your Flight?



For at least two decades, industry experts have been speculating about basic timing factors in finding the lowest airfares. The big question: When is the best time to buy plane tickets? So far, nobody has been able to come up with definitive answers that stand the test of time for very long. But that does not stop them from trying. There are numbers-based guidelines touted by travel experts. And there are tools and data that can help you ascertain the right time to buy. Here is the latest information on mastering the art of *airfare booking*.

How Far in Advance Should I Book My Flight?

Several sources publish data on the correlation between advance purchase period and airfares. The ideal time to buy a domestic ticket is 54 days in advance, says [CheapAir](#), or seven weeks ahead, says [Expedia](#), which are essentially the same findings. For international trips, the ideal period is 171 days ahead of departure, according to the same [Expedia](#) report. CheapAir refines the estimates: 96 days before trips to Europe, and 96 days prior to Latin America trips. Both sources indicate that you can come close to the absolute lowest price over a wide range of dates: CheapAir's "window" for good deals on domestic tickets is 27 to 114 days in advance; Expedia's window is 50 to 100 days.

Avoid booking too early and too late. Too late is especially bad; you pay a huge premium for buying within a week or two of departure – even on airlines that nominally assess no advance-purchase limit.

What Time of Day Should I Book My Flight?



According to urban legend, you should buy on Tuesday mornings because airlines dump new fares and seat allocations on Monday nights. It is also rumored that travelers should not buy on weekends, as consumers lap up the seats allocated to the lowest fare buckets on Saturdays and Sundays, leaving less low-priced inventory.

Here is what George Hobic, founder of sister site, [Airfarewatchdog](#), says: “No one can accurately predict where airfares are heading any more than we can predict the stock market.”

Hobic’s [blog](#) points to a quote from an airline revenue manager on the subject: “To say that there is one time of the day or one day of the week that is better than another is false. Plus, fares are so dynamic, since they are based on market conditions, and the actual number of passengers who are currently booked on a specific flight, that they can change rapidly at any time.”

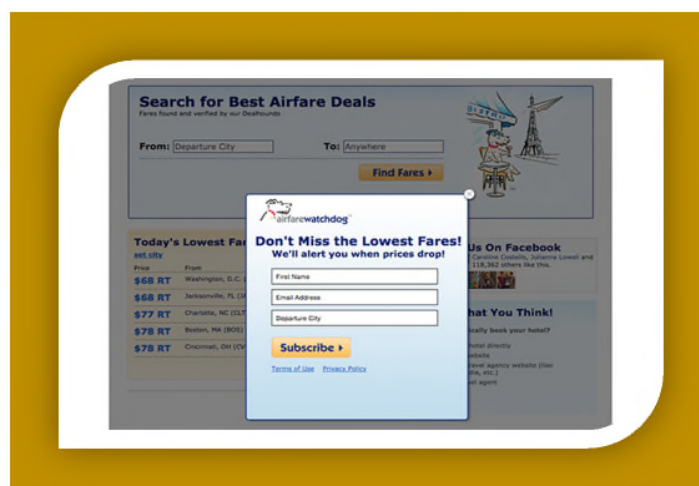
But the manager goes on to contradict himself a little bit: “Many airlines tend to announce sales on a Monday, leading other airlines to match certain fares the following day, but this is not a hard and fast rule.”

When Do Plane Tickets Go on Sale?



The best time to buy an airline ticket is when it is on sale; that means you must stay on top of the airline marketplace. [Airfare sales](#) crop up at random times. Typically, the purchase window is short – sometimes just one day, often a few days to a week – but the sale fares are usually good for a month or more.

As Hobic puts it, “Pounce when there’s a deal.” And remember: With almost all U.S. airlines, you can [cancel your ticket](#) within 24 hours of booking at no charge. Even if you have already bought your fare, you can keep looking for a better offer within that 24-hour window.



How Do I Stay on Top of Fare Sales?

Unless you enjoy the prospect of spending much of every day searching airline and OTA websites, the best way to keep on top of airfare sales is to subscribe to one or more airfare alerts. You have a range of choices. For help,

you may want to start with SmartTravel's free [fare alerts](#), its sister site, [BookingBuddy](#), and Airfarewatchdog's famous [fare alerts](#). In addition, many individual airlines, big OTAs, and metasearch systems offer airfare alerts or promotional bulletins.

Keep two important factors in mind when you search: First, Southwest fares are not available from any OTA or metasearch system; you can get these alerts from the SmarterTravel, BookingBuddy, and Airfarewatchdog links above or from Southwest [directly](#). Second, any time a big airline announces a sale, competitors usually match it, at least where they compete directly, within 24 hours. So always take some time to shop around before you book.

What Are Some Other Ways to Get Fare Alerts?



You can get fare alerts directly from your favorite carrier. Many airlines offer weekly or periodic email notifications of special sales and other useful information. It is a good idea to set up alerts from an airline with which you frequently fly, especially if you collect miles.

Many OTAs and metasearch systems also offer regular airfare-deal bulletins, including the two giants, [Expedia](#) and [Priceline](#).

Or download an app. [Airfarewatchdog](#) and [Skyscanner](#) are two apps that tell you when to buy.



MONEY SAVING TIPS

Do it Yourself Car Maintenance Tips



The following article was written by Julie E. Lee, Vice President and National Director of AARP Driver Safety, Education and Outreach (and published by Jen Lupo Reese at the AARP California), has more than 30-year experience in management, strategic planning, transportation and safety. With AARP for over ten years, Ms. Lee directs the largest driver improvement course designed for drivers age 50 and older.

With the average age of cars on the road approaching 11 years, routine maintenance is more important than ever. In addition to fuel and insurance, vehicle maintenance is one of the most expensive out-of-pocket costs for car owners, which is why some drivers opt for DIY – “do-it-yourself” – maintenance.

You may not be an auto expert or repair professional, but some routine tasks, such as replacing worn windshield wipers and changing the air filter, can be performed quickly and easily at minimal cost. But before you get your hands dirty, consider some basic safety tips.

- Always perform do-it-yourself tasks on a level ground.
- Be sure your engine is turned off and your key is out of the ignition.
- Make sure your vehicle is in the parked position and the brake is engaged.
- If you are not 100 percent comfortable performing a maintenance task, don't do it. Seek help from an auto mechanic or professional.

To help you save money and time, AARP Driver Safety has outlined instructions for replacing worn windshield wipers and changing your air filter – two tasks that need to be performed regularly, and if completed at home, could result in significant long-term savings.

Replace worn windshield wipers.

Windshield wiper blades should be changed every six to twelve months. If you notice streaking from the wipers on the windshield when it is raining, then it is time for a replacement.

Replacing wipers is a quick and easy task; no special tools are needed. The estimated cost for wipers is between \$10 and \$20. Consult the professional in your local auto store for the correct size wipers for your car, and if you have an SUV or car with a wiper for the rear window, do not forget to purchase a third blade. Here is the step-by-step process for replacing worn windshield wipers.

1. Pull the wiper away from the windshield, as if you were washing your windshield by hand.
2. Press the small tab on the underside of the wiper to slide the wiper off the wiper arm.
3. Remove the old blade. Pay attention to how the old blade connects to the wiper arm.
4. Line up the new wiper with the wiper arm and lower it onto the arm. Be careful not to scratch your windshield.
5. Pull it tight until you hear a click to make sure it is secure.
6. Lower the wiper arm back to the windshield and repeat these steps with the other wiper.

If you cannot remember how the new blade fits on the wiper arm, there are usually a set of instructions that come with the new set of wiper blades. Follow those if you miss a step!

Change the air filter.

Most modern cars are equipped with air filters that filter out dust, pollen and other particles. If the air filter is not changed periodically, it can cause a pressure drop which, in turn, restricts airflow, causing the fuel economy to decline. Air filters should be changed about twice a year, as part of your routine maintenance, but check your owner's manual to see what the auto manufacturer recommends for your vehicle. If you do not remember changing the filter within the last six months, it is probably time for a new filter. Changing the filter will take about 10 minutes and a new filter will cost between \$15 and \$30.

1. Pop the hood of your vehicle and locate the air filter. It is usually in a black square case with metal clips on the side. If you cannot find it, check your owner's manual.
2. Open the case and see how the air filter fits inside it and which way the filter faces. This will make it easier for you to put in the new filter.
3. Carefully remove the old filter, and insert the new one exactly how the old one was in place.
4. Close the case and secure the metal clips.

Make sure your engine is cooled down before trying this – and never start your vehicle when the air filter is removed. Small particles can get sucked into the engine and cause serious damage.

For more tips on how to stay safe on the road, consider taking a driver improvement course, such as the AARP Driver Safety course, available in a classroom or online setting, in both English and Spanish. In some states, you may even be eligible for a multi-year insurance discount upon completion of the course.*

For more information, visit www.aarp.org/safedriving, or call 1-888-AARP-NOW (1-888-227-7669).

** The insurance premium discount is not available in all states for the online or the classroom versions of the course. Please consult your insurance agent for further details.*



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

**SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION
CHAPTER ACHIEVEMENTS**

(Please submit this form each month.)

Month: July 2017

Your Name: _____ Position held, if any: _____

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

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

Upcoming Events



Team SFLPA AIDS Walk SF Sunday, July 16, 2017

We invite interested members to join our AIDS Walk SF Team. Participants are provided with a nutrition bag on the walk and are asked to help us raise money for this nonprofit organization. RSVP to: smendez@altber.com



San Francisco Legal Professionals Association

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

www.sflpa.org

MEMBERS QUARTERLY DINNER MEETING **(NON-MEMBERS WELCOME)**

Date: Tuesday, July 18, 2017

Time: 5:30 to 7:30 p.m.

Place: Jones Day, 555 California Street, 26th floor, San Francisco, CA

Speaker: Marc Siegel, Esq., Partner at Jones Day

Topic: "When Companies & Their Executives Engage in Price Fixing"

Dinner Menu: Taco Bar w/chicken, beef & veggie options includes rice, beans, tortillas, dessert, soft drinks, coffee, beer and wine.

Cost: \$25.00 for Members / \$30.00 for Non-Members

You can also pre-pay using Venmo, by mail to the address above or bring a check or cash with you to the meeting.

Please RSVP: By Friday, July 14, 2017 to sflpa.event.reservations@gmail.com

PLEASE NOTE: 24-hr cancellation required to avoid being charged for meals. No-shows will be charged for their meal.

½ Hour MCLE & CCLS Continuous Education Certificates Available

About Our Guest Speaker

Marc Siegel worked for 30 years at the Antitrust Division of the U.S. Department of Justice in senior leadership positions involving global and domestic criminal cartel enforcement and policy development. As Director of Criminal Enforcement, he worked closely with the Criminal DAAG (deputy assistant attorney general) in Washington, D.C. to oversee the then-eight criminal field offices. As chief of two of the Division's busiest criminal offices, Mr. Siegel supervised all aspects of the global and domestic cartel investigations in the Municipal Bonds, Auto Parts, Northern California Real Estate Foreclosure Auctions and Capacitors markets. Mr. Siegel has worked closely with teams of FBI agents and coordinated investigative efforts with foreign enforcers conducting parallel investigations and successfully prosecuted international cartel matters in several commodity chemicals markets. He has negotiated more than two dozen corporate and individual plea agreements as well as corporate leniency agreements. Mr. Siegel also currently teaches antitrust law at UC Hastings College of the Law.

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San Francisco Legal Professionals Association



July 25, 2017 Brown Bag Presentation

IP LITIGATION: WHY IT'S SO IMPORTANT TO PROTECT WHAT YOUR MIND CREATES!

Presented by Jeff Knowles

Here in Bay Area, the tech capital of the world, Intellectual Property is one of the largest growing specialized law practices. Do you ever wonder why it's such a fuss to download your favorite song from just any website? This presentation will give members an understanding of what Intellectual Property entails and why it's such an important law practice right now.

Tuesday, July 25, 2017

12:30 – 1:30 p.m.

Coblentz Patch Duffy & Bass LLP

**One Montgomery Tower (Enter through 120 Kearney St.), Suite 3000,
San Francisco, CA 94104**

RSVP to: Francie Skaggs – francieskaggs@gmail.com - by: Friday, July 21, 2017

One Hour MCLE Credit & CCLS Continuous Education Certificates Available. This event is open to anyone in the legal industry. Feel free to share with your colleagues and friends. Attendees are encouraged to bring your lunch and enjoy the presentation.

About the Speaker:



A co-managing partner of Coblentz, Jeff Knowles is a trial lawyer practicing complex commercial litigation with an emphasis on intellectual property matters. He has specific expertise in copyright, trademark, trade secret, Lanham Act, and other unfair competition cases, with deep experience in music-related litigation. He has represented clients in a broad array of industries, from music and Internet technology to consumer products and real estate.

Jeff served as a law clerk to the Honorable Eugene F. Lynch of the United States District Court for the Northern District of California (1987-1988), and prior to joining the firm, worked as a trial attorney for the U.S. Department of Justice in Washington, D.C. where he represented federal agencies in national impact litigation.

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



Santa Clara County Legal Professionals Association

invites you to

The San Jose Giants v. Inland Empire 66ers

Municipal Stadium, 588 East Alma Ave. San Jose, CA 95112



Saturday, August 5, 2017

Game Time: 6:00 p.m.

Tickets: \$50 Adults / \$30 Children

Be part of the action as we watch the San Jose Giants from the private field level VIP Party Deck! Your ticket package includes one game ticket, a delicious BBQ meal, and two alcoholic beverages per guest as well as a personal Beverage and Food Attendant. You will have the opportunity to win Lucky Prizes throughout the game with your very own scorecard and bingo card! Learn about the history of the team with one of the handful of programs included.

Make reservations and payment at

www.sccolpa.org

or contact Reservations Chair M'Liss Bounds,

reservations.sccolpa@gmail.com

Please contact Rod Cardinale, Jr. at
rodcardinalejr@sbcglobal.net if you have any
questions about the game/ticket purchase.

Please RSVP by July 27, 2017



California Certified Legal Secretary
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APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LSI Membership Card (if applicable), and fees to:
April K. Ignaitis, CCLS, CCLS Certifying Board, P.O. Box 2879, Cupertino, CA 95015

(Select one) ☐ **Northern California** (Select one) ☐ **Saturday, September 16, 2017**
☐ **Southern California** ☐ **Saturday, March 17, 2018**

- **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.

EXAMINATION FEES (Select Payment Type)		Check <input type="checkbox"/> Payable to "LSI" Mail to above address	PayPal <input type="checkbox"/> Email exam application to CCLSCertifyingBoard@gmail.com . Payment link will be provided upon confirmation of eligibility to sit for exam.
LSI Members <input type="checkbox"/>		Non-LSI Members <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)	30.00	Late Fee (if applicable)	30.00
TOTAL DUE w/o Late Fee:	\$125.00	TOTAL DUE w/o Late Fee:	\$175.00

Personal Information

Name: _____

Mailing Address: _____

Last 4 digits of SSN: _____ Email: _____

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

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

Name of Local LSI Association: _____

Employment Information

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

Position: _____ Dates of Employment: _____

Employer: _____
(name and address)

Supervisor: _____ Supervisor's Phone: _____

Supervisor's Email: _____

Summary of Duties: _____

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

Date: _____

Applicant Signature _____

*Fees subject to change without notice.

Rev. February 2017

INDISPENSABLE



LEGAL PROFESSIONAL'S HANDBOOK

...THE ULTIMATE RESOURCE GUIDE!

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

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Legal Secretaries, Incorporated

LEGAL SPECIALIZATION SECTIONS

CIVIL LITIGATION

CRIMINAL LAW

FAMILY LAW

LAW OFFICE ADMINISTRATION

PROBATE/ESTATE PLANNING

TRANSACTIONAL LAW



ARE YOU A MEMBER OF THE LEGAL SPECIALIZATION SECTIONS?

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

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

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

LEGAL SPECIALIZATION SECTIONS

2017-2018 Membership Form

MAY 1, 2017 - APRIL 30, 2018

Membership includes access to free quarterly workshops at LSI conferences for those sections you are a member of; quarterly newsletters that include changes to the law and forms; discounted LSS webinars; statewide roster of all LSS members in each section for easy access to local procedural information in other counties; and networking opportunities. The Legal Specialization Sections (through LSI) offer continuing legal education credit for California Certified Legal Secretaries and MCLE for paralegals and attorneys.

JOIN OR RENEW AT WWW.LSI.ORG

PAY VIA CREDIT CARD OR PAYPAL

SECTIONS

(circle which sections you are joining)

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

LSI Member Rates:

Individual Section: \$20

All Six Sections: \$75

Non-LSI Member Rates:

Individual Section: \$40

All Six Sections: \$150

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

Name: _____

Email Address: _____

LSI Member, Local Association/MAL: _____

Legal Specialty(ies): _____

Counties/Courts: _____

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

Dawn R. Forgeur, CCLS
LSS Coordinator

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

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



INTRODUCTION TO THE SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION (“SFLPA”)

A Professional Association for Legal Secretaries and Other Law Office Professionals

(Formerly San Francisco Legal Secretaries Association (“SFLSA”))

Established 1936

Member Legal Secretaries, Incorporated,

A California Nonprofit Corporation

Established 1934

SFLPA Objectives

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

Membership Information

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

Membership Eligibility

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

Membership Benefits

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



San Francisco Legal Professionals Association (SFLPA)

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

APPLICATION FOR ACTIVE MEMBERSHIP

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

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

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

IF I AM ACCEPTED AS A MEMBER, I AGREE TO BE BOUND BY THE BYLAWS AND STANDING RULES OF LEGAL SECRETARIES, INCORPORATED AND THE SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION TO WHICH I AM APPLYING FOR MEMBERSHIP, INCLUDING THE FOLLOWING CODE OF ETHICS:

"IT SHALL BE THE DUTY OF EACH MEMBER OF LEGAL SECRETARIES, INCORPORATED TO OBSERVE ALL LAWS, RULES AND REGULATIONS NOW OR HEREAFTER IN EFFECT RELATING TO CONFIDENTIALITY AND PRIVILEGED COMMUNICATION, ACTING WITH LOYALTY, INTEGRITY, COMPETENCE AND DIPLOMACY, IN ACCORDANCE WITH THE HIGHEST STANDARDS OF PROFESSIONAL CONDUCT."

APPLICANT'S SIGNATURE: _____ DATED: _____

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

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

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

Revised 05/2013

HEARSAY

July 2017

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San Francisco Legal Professionals Association

MEMBERSHIP RENEWAL FORM For The Fiscal Year Of May 1 Through April 30

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

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

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

Please:

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

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

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



CHANGE OF ADDRESS FORM

Member Name _____

New Address _____ City _____ State _____ Zip _____

New Home Telephone

New Office Telephone

New Personal Email Address

New Work E-Mail Address

New Employer Name _____

New Address _____ City _____ State _____ Zip _____

Please indicate preferred contact method: ☐ **Home** ☐ **Work**

YOUR SPECIALTY:

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

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

Please submit to:

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

Member Benefits

Advantages of Membership

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

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

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

MAKE A CAREER CHOICE – BECOME A LEGAL PROFESSIONAL

Why Become a Legal Professional?

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

Why Join Legal Secretaries, Incorporated?

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

How You Can Become a Legal Professional:

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

Discounts for LSI Members

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

LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

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

<p>WORKING ADVANTAGE Toll Free: (800) 565-3712 www.workingadvantage.com Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more. Member ID: Contact LSI Corporate Office, lsiorg@suddenlink.com, or LSI Vice President</p>	<p>HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com</p>
<p>FINANCIAL PROVIDERS</p>	
<p>CAPITAL INVESTMENT ADVISERS Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 www.ciadvisers.com Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>	<p>LEGACY WEALTH MANAGEMENT Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz Offering discounted John Hancock Long Term Care Insurance and Life Insurance, Annuities, Retirement, Investment and Estate Planning, Mutual Funds, and 401K</p>
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<p>LA FINANCIAL FEDERAL CREDIT UNION P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p>PROVIDENT CREDIT UNION 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 www.providentcu.org All LSI members are eligible to join.</p>

QUESTIONS AND CONCERNS CONTACT:
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LSI Marketing Committee Coordinator
PO Box 150427, San Rafael, CA 94915
Home - (415) 989-1010
Cell - (415) 710-3402
jlpag@ix.netcom.com

Revised 6/12/2014

SAN FRANCISCO FESTIVALS AND EVENTS 2017

JULY 20-23

San Francisco Frozen Film Festival

Roxie Theater

www.frozenfilmfestival.com

Showcasing the year's best new independent avant-garde pop culture films, the Frozen Film Festival takes its name from the distinct chill of the San Francisco summer.

JULY 20-AUGUST 6

San Francisco Jewish Film Festival

Castro Theater and other venues around the Bay Area, 415-621-0556 (info), 866-558-4253 (tickets)

www.sfjff.org

Films from American and international filmmakers showcase the diversity and vitality of Jewish culture. The festival is the first, oldest and most prestigious celebration of its kind in the world.

JULY 23

San Francisco Marathon, Half Marathon, 5K Run/Walk

Ferry Building, The Embarcadero

<http://www.thesfmarathon.com/>

Enjoy the amazing city of San Francisco by taking part in one of the world's great marathons. The USAT&F Certified course is a "best of San Francisco" tour and includes a loop over the Golden Gate Bridge. Choose from running the marathon, half marathon, progressive marathon, 5K run/walk races or really take on the challenge with the "Worth the Hurt" 52.4 double marathon.

JULY 23-31

Japan Film Festival of San Francisco

New People Cinema, 1746 Post St.

www.jffsf.org

Japan Film Festival of San Francisco is the first and only fully dedicated annual Japanese film event in the San Francisco Bay Area. Showcasing the latest in anime, live-action and documentaries straight from Japan, this week-long festival will take place in San Francisco's historic Japantown.

JULY 30

Up Your Alley Fair

Dore Alley between Folsom and Howard and adjoining block of Folsom between Ninth and 10th streets, 415-777-3247

www.folsomstreetevents.org/upyouralley

Similar to September's Folsom Street Fair, which is the climax of Leather Pride Week, this event has a more local appeal for leatherfolk and draws some 12,000+ attendees.

JULY (TBA)

Salsa Festival on The Fillmore

Fillmore Street, various venues

www.salsafestivalfillmore.com

The Salsa Festival on The Fillmore closes off three city blocks and features free concerts, salsa lessons and outdoor dancing at the Fillmore Center Plaza.

Editor's Message



Hello everyone,

We hope you are all enjoying this wonderful Bay Area weather!

Membership renewals are due this month and we'd hate to have you lose on your newsletter. Our newsletter is one of the monthly perks you receive each month with your subscription. As many of you already know and have read, the Hearsay won again. It takes a huge group effort to put our newsletter together so you can receive it on a monthly basis. Aside from it being distributed electronically to all of you, you can also find archived copies of the Hearsay in our website.

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

FIRST CLASS MAIL

LSI Code of Ethics

It shall be the duty of each member of Legal Secretaries, Incorporated, to observe all laws, rules and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence and diplomacy, in accordance with the highest standards of professional conduct.

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