



# Hearsay

PO Box 2585, San Francisco, CA 94104  
[www.sflpa.org](http://www.sflpa.org)

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**San Francisco Legal Professionals Association**



**TAKE PRIDE IN YOUR WORK AND MAKE A DIFFERENCE**

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# Meet Your SFLPA TEAM . . .

Elected Officers:	President..... Carol Romo <a href="mailto:President@SFLPA.org">President@SFLPA.org</a>
	Vice President..... May Sene <a href="mailto:VicePresident@SFLPA.org">VicePresident@SFLPA.org</a>
	Secretary..... Sally Mendez <a href="mailto:Secretary@SFLPA.org">Secretary@SFLPA.org</a>
	Treasurer ..... Scheryl Warr <a href="mailto:Treasurer@SFLPA.org">Treasurer@SFLPA.org</a>
	Governor.....Christine Flores <a href="mailto:Governor@SFLPA.org">Governor@SFLPA.org</a>
Appointed Officers:	Executive Advisor ..... Larry McGrew <a href="mailto:ExecutiveAdvisor@SFLPA.org">ExecutiveAdvisor@SFLPA.org</a>
	Parliamentarian ..... Open
	Website Editor ..... Sally Mendez <a href="mailto:WebsiteEditor@SFLPA.org">WebsiteEditor@SFLPA.org</a>
	Bulletin Editor ( <i>Pro Tem</i> ) ..... Michelle Vigil <a href="mailto:BulletinEditor@SFLPA.org">BulletinEditor@SFLPA.org</a>
	Historian ..... Lillian Wong <a href="mailto:Historian@SFLPA.org">Historian@SFLPA.org</a>
Committee Chairs:	Membership ..... May Sene <a href="mailto:Membership@SFLPA.org">Membership@SFLPA.org</a>
	Education:..... Frances Skaggs <a href="mailto:Education@SFLPA.org">Education@SFLPA.org</a>
	Programs ..... Open
	Day-In-Court ..... Lillian Wong <a href="mailto:DayInCourt@SFLPA.org">DayInCourt@SFLPA.org</a>
	Ways & Means ( <i>Pro Tem</i> ) ..... Scheryl Warr <a href="mailto:Ways&amp;Means@SFLPA.org">Ways&amp;Means@SFLPA.org</a>
	Legal Procedures ..... Open <a href="mailto:LegalProcedures@SFLPA.org">LegalProcedures@SFLPA.org</a>
	Advertising/Marketing ..... Leon Thomas, Jr <a href="mailto:AdvertisingMarketing@SFLPA.org">AdvertisingMarketing@SFLPA.org</a>
	Social Media / Public Relations..... Open
	Career Advancement/Scholarship..... Open
	Interclub ..... Carol Romo <a href="mailto:Interclub@SFLPA.org">Interclub@SFLPA.org</a>

## President's Message



**Carol Romo**

Greetings everyone.

I have a very industrious year planned ahead to better serve our core members of Legal Secretaries and attorney support staff in mind. Starting with new Board assignments and some first time Board Members, I am focused on bringing new ideas and leadership

to our Association. I would also like to see more young members in our Association and continue to target Legal Secretaries from every law firm of this great business driven city known all over the world.

One of my first steps as President was to implement a new appointed officer, Website Editor, who would bring our Website into the 21st century by setting it up to assist with the operation of this Association. I believe the website is probably the most important and most powerful tool for drawing new membership and connecting current members with resources, information and each other. Not only will it keep people informed timely, it will also help Board Members by making signup, membership application, payments much easier to keep track of by having people sign up and pay online. A photo gallery is being constructed and a password protected members only section is also there. We are very fortunate to have our Secretary Sally Mendez as our Website Editor. Combined with her position as our Secretary and the years of experience as our Bulletin Editor, our website will be all that.

This year, I have also combined some of our Committees to better fulfill and more evenly divide the individual tasks of our Board Members. Advertising and Marketing are now one committee along with Social Media and Public Relations, and Career Advancement and Scholarship. I also sought to bring new members to the Board and succeeded in getting two first time Board members. But I am still trying to fill Programs Chair, Ways & Means Chairs and Bulletin Editor, which are currently being covered Pro Tem thanks to our Treasurer Scheryl Warr and SFLPA member Michelle Vigil.

Another goal of mine has always been to increase the perks for our members, I believe the best way to achieve this goal is to change the way our Association interacts with legal

service providers (aka vendors) in San Francisco. By enlisting the support of different legal service vendors who are interested in sponsoring our events such as picking up the tab for our members (only) dinners at meetings, Holiday party, and annual installation, we can in return show our appreciation by enlisting the services of these participating vendors whenever the opportunity might arise for each individual member present. So, starting with our first member dinner meeting of the fiscal year on July 24, Litivate will pay for our members' dinner and give a brief presentation before the meeting starts that evening. By supporting each other in this way, we can develop stronger relationships with a wide variety of legal service providers.

Speaking of our dinner meetings, our membership meetings will start taking place every other month starting with the July member meeting. This will keep our members more in tune with the operation of the Association and its Board of Directors. Most Associations under LSI meet every month, and I think everyone will agree that it is important to stay in touch with each other more frequently than on a quarterly basis.

Our educational events will continue to be as good as they have been. We will continue with our popular Brown Bags, seminars and evening presentations, as well as our annual Legal Secretaries Training Course which has been lauded by attendees and legal administrators alike.

Finally, if you haven't heard, San Francisco Legal Professionals Association will be hosting its first LSI (Legal Secretaries Incorporated) Conference in twelve years in November 2019. We are already on the road to planning and putting this much anticipated event together, but we will need the help of all of our members to make it a real success. The money we raise by hosting this conference will go directly to our members by provided financial means to attend conferences hosted by other Associations throughout the state. It will also provide opportunity to meet other legal secretaries throughout the state, many of whom have asked me when San Francisco will host a conference.

So, with all of the these things planned for this term, me and the rest of your Board members certainly have our hands full. But of course, we will need help to get all of things working like a well-tuned engine. In closing I leave you with my motto: **Take pride in your work and make a difference.**

## Interclub Chair's Message



**Carol Romo**

As Interclub Chair I am expected to attend events hosted by our neighboring Associations under the LSI umbrella. This includes trading information about upcoming educational programs and showing San Francisco LPA's support to those Associations. Therefore, I will be traveling to Sacramento, Marin, Contra Costa, Alameda, Santa Clara, and San Mateo to represent San Francisco Legal Professionals Association at meetings or fund raising events for these LPA and LSA (Legal

Professional Associations and Legal Secretary Associations. By attending events like these, I not only come away with great ideas, new friends, and fond memories, but our Association gets Chapter Achievement points which are kind of like brownie points that get tallied up and announced at LSI's annual conference each year. I am always proud to represent San Francisco LPA at all of the events I go to and promote our own upcoming events at each function. I will post the outside events I will be attending on our Event Calendar on our Website. If you are interested in joining me please let me know and we can arrange for transportation

## Vice President's Message

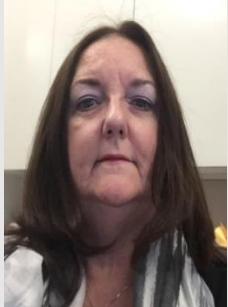


**May Sene**

I serve as Vice President and Membership Chair of SFLPA for the 2018-2019 fiscal term. In my dual capacities, I plan to increase the visibility of our great organization to various law firms in the San Francisco Bay Area and to increase our membership. I also plan to

increase and promote the professionalism of our organization. I will work with all SFLPA board members to ensure that things run smoothly and efficiently. I also plan to reach out to each of our existing members to ensure that they feel appreciated and valued and an important part of SFLPA.

## Governor's Message



**Christine Flores, CBA**

As your Governor, I represent the members of SFLPA at the quarterly meetings of Legal Secretaries, Incorporated. I am your voice and vote according to the needs of SFLPA. I am your liaison to LSI and would be pleased to provide any further information you would like regarding the conferences and other activities of LSI. In order to keep LSI apprised of our activities and events, I will be asking

the Officers and Chairmen to submit Directive Responses to their LSI counterparts. These are simple questionnaires which inquire about the events of the previous quarter. My other role as Governor is to track our Chapter Achievement. There is a contest every year based on our activities and events, such as attendance at other local association seminars and events, attendance at LSI conferences, as well as our own fundraising, education and networking efforts. The awards are presented every year in May at the Annual Conference, and it is my hope that our participation will earn us an award at the May 2019 Annual Conference.

## Day-In-Court Chair's And Historian's Message



**Lillian Wong**

Greetings! As Day-in-Court Chair, I set up mock trial and court tours annually for SFLPA. I contact a judge and set a schedule, then get a courtroom, and host our mock trial. Last fall, I got volunteers to partake in a role in our Mock Trial called, "Humpty Dumpty

vs. the King." Great experience and turnout for all who participated.

My goal is to have members get exposure and experience of the court system, see and participate first-hand.

Another event last fall, was a court tour at the 9th Circuit Court. We had a guide show us around and give us the history of the Court and it was a beautiful Court indeed!

This will definitely leave a great impression as to what SFLPA is all about – learning and having fun for our members, which is definitely helpful to expand your professional career.

As Historian, I'm the record keeper of pictures that I take and put into album(s) for our annual LSI conference contest and try to win the best scrap book award. I snap away with my camera when I attend classes, conferences, and social events. If you happen to be at any of our SFLPA meetings, social events; other chapter associations; and LSI conferences/events, I will be there to take pictures. Smile, you might be the next person on the cover!

## Executive Advisor/Conference Co-Chair's Message



**Larry McGrew**

As your Executive Advisor and Conference Co-Chair, I Assist and advise the incoming President on

matters when needed. As Conference Co-Chair, I oversee the planning, implementation as well as managing the 2019 November LSI Quarterly Conference pursuant to the guidelines provided by LSI

## Education Chair's Message



**Francie L. Skaggs**

**LET ME KNOW WHAT YOU REALLY, REALLY WANT!**

I am honored to be the SFLPA Educational Chair for another fiscal year and have many exciting plans for the upcoming fiscal year. According to our Brass Tacks, it is "important to offer the type of class or seminar which best fills the needs of your local legal community for it to be most successful" I have reached out to many of our members to find out their educational needs so that I can fulfill them in my Brown Bags.

Many people have requested assistance with resumes, so for the June 26, 2018 Brown Bag, two

exceptional people from Robert Half, Tatiana Silver and Jon Lucchese, will be presenting "Improving Your Resume." I also had requests for assistance with understanding the court rules that govern our filings. For that, I have a special evening presentation on July 17, 2017, "Cracking the Code," with Scott R. Herndon, Ph.D., Esq. and I presenting.

One obstacle for people is getting to the Brown Bags during their lunch hour. I receive many RSVP's to the Brown Bags, and then receive emails indicating a need to cancel due to a filing deadline or last minute emergency. In response, I have worked to bring our members special evening presentations that will allow attendees to come after work when all the deadlines are done. The first evening presentation will be the July 17 "Cracking the

Code” presentation, and another evening presentation in either September or October about Social Media with James Wu, Esq., who is an experienced speaker on the subject. This was a very popular subject at the May 22 Brown Bag and could have gone longer if time allowed.

Another project I have been working on is trying to get a clerk from the court to come and talk to our members. My goal is to bridge the communication gap between the court clerks and professional staff in law firms. It would be rewarding for both the court staff and the San Francisco legal staff since we are all working together to better serve litigants at the court. This project has been one of the most challenging I have encountered in my capacity as Education Chair as I have been working

on this for months and have not been able to accomplish my goal, but will continue to persist.

I would also like to bring back the popular and successful 3-Day Educational Workshop we had at the beginning of 2018, in 2019. I will again work with San Francisco State University and the Paralegal Director or making that happen again in January / February 2019.

I would like to invite members to please email me at francieskaggs@gmail.com if you would are interested in any future Brown Bag subjects that I can bring to you. Also, I welcome any assistance from people who have connections or know someone who is interested in speaking, especially court clerks. Cheers to the new fiscal year!

## ***Secretary and Website Editor’s Message***



***Sally Mendez***

Sally Mendez was born and raised in San Francisco, and is a Past President of the SFLPA and is the Secretary and Website Editor. She has held several different Board positions and is the Past Promotion/Scholarship

Program Chair for Legal Secretaries Incorporated. Today, she

is the Senior Secretary at Altshuler Berzon. Sally has been working in the legal industry for over 19 years.

Sally has dedicated her time to Civil Rights and Peace Advocacy since her early childhood upbringing in the Mission District in San Francisco. She is a past member and current advocate member of the Mission Girls Services program which is dedicated to empowering women in the Mission District.

## ***Treasurer and Pro-Tem Was & Means’ Message***



***Scheryl Warr***

Born and raised a Southern California girl, Scheryl began her legal secretarial career back in 1988, after graduating with Honors from Watterson Business College in Sherman Oaks, CA. Her first job as a legal secretary, which was her stepping stone into the legal industry, was working for a personal injury plaintiff’s firm for four years then into an Entertainment law firm for two years. In 1995, Scheryl and her young family moved to the Bay Area where she ran her own child care business for

approximately 10 years. The kids grew up and here she is again since 2004 in the Bay Area back out in the wonderful world of legal. Scheryl currently works for Trucker Huss, APC. She has been a member of SFLPA since May 2014, wherein she started out as the Chairman of Ways & Means for a couple years, on the Historian committee in early 2015, and now Treasurer from 2015/19 as well as temporarily stepping in as the Pro tem chair for Ways & Means for 2018/19.

## Assistant Editor's Message



### **Judy Nakaso**

My job as assistant editor is primarily proofreading - I check for grammar, typos and those extra spaces that sometimes sneak by in articles. I also check for accurate facts (I don't pretend to check fake

news, however). I work with the Editor to ensure that our publication is accurate because whoever reads the Hearsay forms a mental picture of our organization and I want SFLPA to shine in print – either paper or electronic. Together we succeed!



## Advertising and Marketing Chair's Message



**Leon Thomas, Jr.**

Leon Thomas, Jr. has been in litigation support for over 35 years

and has worked with many distinguished attorneys and firms. He is currently a Legal Assistant and Senior Litigation Secretary at Lorber, Greenfield & Polito, LLP in San Francisco. As the Marketing/Advertising Chair, it is Leon's resolve to create greater presence for the many legal entities into SFLPA. Leon is single, has one daughter, and is very active in humanitarian efforts

## Editor's Message



**Michelle Vigil**

Welcome to the SFLPA's Bulletin for July 2018. After our President Carol Romo's gentle yet persistent nudging, I will be the editor of the Hearsay for the time being. Together with Judy Nakaso, our

assistant editor, we have several new ideas we would like to bring to the Hearsay.

In an effort to bring a higher quality reading experience for our members, we intend to publish the Hearsay quarterly instead of monthly. We believe this will give us sufficient time to include more substantive material for an enjoyable reading experience.

Our objective is to enhance the Hearsay for our members so that it is always informative, entertaining, and useful. Inside you will find reports from our officers and chairpersons, detailed flyers with upcoming social

and educational events, as well as articles on legal practices and developments, practical advice, and "how-to" articles to help our readers achieve career goals and uphold pride in being the best in the legal field.

The President and Hearsay Editors are happy to receive written article contributions for our next issue, from secretaries, paralegals, law clerks and other legal support professionals, so we can include a wide range of legal-related topics. "How-to" articles regarding MS Office and other office software are encouraged and welcome.

Our Historian, Lillian Wong, will provide pictures from conferences and events, and for those rare days when you have down time, a legal word search or crossword puzzle will be included in each issue.

I truly hope that this periodical will be a benefit to the SFLPA community and I would like to thank you in advance for your positive support and feedback.

*Editor's Dedication:*

*To Mr. Burland, Ret., Teacher and Mentor.*

**Mat Yamagata**

Director of Business Development



415.213.5883 P | 877.771.3312 P

415.518.0110 C | 877.561.5538 F

[www.Litivate.com](http://www.Litivate.com); [Mat@Litivate.com](mailto:Mat@Litivate.com)

## *Upcoming Events . . .*

COME JOIN US FOR PAINT NITE IN SAN FRANCISCO on Wednesday, **August 1, 2018 at 6:30 p.m.**

DEADLINE TO BUY TICKETS IS NEXT WEEK TUESDAY, JULY 17th.

Join San Francisco Legal Professionals Association as we raise glasses and funds for a worthy cause! The event will take place at the Hotel Majestic at 1500 Sutter Street. A turn-of-the-century masterpiece with vintage Edwardian décor and architecture as well as luxury accommodations, the Hotel Majestic is one of the premier hotels in San Francisco, California. Located near the Victorian neighborhoods of the Pacific Heights, it is one of the rare San Francisco buildings to survive the Great Earthquake of 1906 and the subsequent fire. This boutique hotel is one of a kind and even has a few ghost stories.

Our fundraiser is raising the funds to support the upcoming 2019 SFLPA November LSI Conference that San Francisco Legal Professionals Association will be hosting at the Hilton in San Francisco, Financial District. So come on out Wednesday, August 1st at 6:30 p.m. for a fun evening of painting, food and drink and let your creative side out. Bring friends, family and co-workers. You are guaranteed to have a great time!

When you buy a ticket to this event, \$15 will be donated to our help SFLPA fund the conference. Feel good about giving as our local artist guides us through two hours of painting, drinking, and laughing 'til your cheeks hurt. The best part? You don't have to be an artist to have an amazing time.

To purchase tickets and see the painting I selected please go to this link:

<https://www.paintnite.com/events/city-blossoms-at-the-hotel-majestic-10088343>

or this link through our SFLPA website:

<https://www.sflpa.org/events-calendar/>

If you have any questions, please feel free to email me and I will respond. Hope to see you there so mark your calendars. Thank you.

Sheryl Warr, Treasurer

# STOCKTON-SAN JOAQUIN COUNTY LEGAL PROFESSIONALS ASSOCIATION

INVITES YOU ALONG FOR A

## California Road Trip!

LSI 1<sup>ST</sup> QUARTERLY CONFERENCE

AUGUST 17-19, 2018

The Stockton Hilton  
2323 Grand Canal Blvd.  
Stockton, California 95207

### CONFERENCE REGISTRATION FORM



Name (as it will appear on badge):

Mailing Address:

City/State/Zip:

Home/Cell Telephone:

Work Telephone:

Email address:

Local Association (please spell out):

PLEASE INDICATE IF YOU ARE:

\_\_\_\_\_ State Officer

\_\_\_\_\_ State Chairman

\_\_\_\_\_ Governor

\_\_\_\_\_ CCLS \_\_\_\_\_ PLS

SCRIP (includes Registration, Welcome Reception, Banquet and Brunch):

POSTMARKED ON OR BEFORE JULY 20, 2018

\$ 125.00

\$ \_\_\_\_\_

POSTMARKED AFTER JULY 20, 2018

\$ 135.00

\$ \_\_\_\_\_

INDIVIDUAL TICKETS:

\_\_\_\_\_ Registration PRIOR to July 20, 2018

\$ 20.00

\$ \_\_\_\_\_

\_\_\_\_\_ Registration AFTER July 20, 2018

\$ 30.00

\$ \_\_\_\_\_

\_\_\_\_\_ WELCOME RECEPTION (Friday)

\$ 25.00

\$ \_\_\_\_\_

LUNCHEONS

\_\_\_\_\_ Presidents' Luncheon (Saturday)

\$ 27.00

\$ \_\_\_\_\_

\_\_\_\_\_ Governors' Luncheon (Saturday)

\$ 27.00

\$ \_\_\_\_\_

\_\_\_\_\_ Open Luncheon (Saturday) - Open to All

\$ 27.00

\$ \_\_\_\_\_

CHOOSE ONE: \_\_\_\_\_ Lemon Grass Chicken Lettuce Wrap or \_\_\_\_\_ Portobello Mushroom Lettuce Wrap

\_\_\_\_\_ BANQUET (Saturday Evening)

\$ 60.00

\$ \_\_\_\_\_

CHOOSE ONE: \_\_\_\_\_ Rib Eye Steak \_\_\_\_\_ Chicken

\_\_\_\_\_ Vegetable Napoleon

\_\_\_\_\_ BRUNCH (Sunday)

\$ 30.00

\$ \_\_\_\_\_

TOTAL AMOUNT ENCLOSED

\$ \_\_\_\_\_

Special Dietary Restrictions \_\_\_\_\_

PLEASE MAKE CHECKS PAYABLE TO SSJCLPA AUGUST CONFERENCE

RETURN THIS FORM WITH PAYMENT TO REGISTRATION CHAIR:

Jan Kuykendall, 11662 N. Ham Lane, # 41, Lodi, CA 95242;

For questions call Jan Kuykendall evenings at 209 747-4781 or email [ks24fanatic@aol.com](mailto:ks24fanatic@aol.com) or

Colleen Young at 209- 609-4042 or email [youngns@comcast.net](mailto:youngns@comcast.net)

NO REFUNDS AFTER AUGUST 1, 2018



## San Francisco Legal Professionals Association

### MEMBER DINNER MEETING



TUESDAY, JULY 24, 2018  
FROM 5:30 TO 8:00 PM  
(\$30.00 for Non-members)



Orrick Herrington & Sutcliffe, LLP  
405 Howard Street, 10<sup>th</sup> Floor, San Francisco, California

<b><u>Evening Schedule:</u></b>	5:30 to 6:00 pm	Social networking, Beer & Wine
	6:00 pm	Buffet Dinner
	6:10 to 6:20 pm	Presentation by Litivate
	6:20 to 6:30 pm	Pledge of Allegiance followed by introduction of Guest Speaker
	6:30 to 6:50 pm	Guest Speaker Presentation
	6:50 to 7:45 pm	Member Meeting
	7:45 pm	Adjournment / Raffle Drawing

**Menu:** Entrée, side dish, salad, desert, beverages, beer & wine

**\*RSVP online at [www.SFLPA.org](http://www.SFLPA.org) by July 23, 2018\***

***Featuring: Jonathan Belaga, Esq.***  
***"The Non-lawyers' Role in Preventing Legal Malpractice."***



Jonathan Belaga earned a B.A. in History and Political Science from Emory University in Atlanta, Georgia in 1997, and a M.S. in Biomedical Science from Barry University in Miami Shores, Florida, in 1998. After graduate school, Jonathan worked for several years in the technology industry, including seven years in international customer relations. He returned to school and earned a J.D. from Tulane University in New Orleans, Louisiana in 2010, with a certificate in Civil Law. Since 2010, Jonathan has focused his law practice on litigation from both plaintiff and defense perspectives. He has experience with personal injury, labor and employment, professional liability, public entity, business litigation, lemon law and malpractice; the latter of which he will share with us from a non-attorney standpoint.

Special thanks to our dinner sponsor for the evening, Litivate, who will be covering the cost of our members' dinner for the evening. **Members:** Please show your appreciation by giving Litivate a try when the opportunity comes up in the future. This will help ensure continued vendor support of this nature in the future. Thank you, Litivate!.

***\*The Fine Print:*** Accurate headcount is important because the meal is charged per-person based on the RSVP list. All non-members are welcome to attend at \$30.00 per person. Please sign up and pay on our website at [www.SFLPA.org](http://www.SFLPA.org) or RSVP by email to [President@SFLPA.org](mailto:President@SFLPA.org) and bring your check with you to the meeting. Thank you.

## The Changing Role of the Legal Secretary

By:

**Jennifer Hill**, President

JHill's Staffing Services, a Division of Marcum Search LLC

310-432-7532

[Jennifer.Hill@marcumsearch.com](mailto:Jennifer.Hill@marcumsearch.com)

[www.jhccs.com](http://www.jhccs.com)

Association of Legal Administrators • 8700 W Bryn Mawr Ave • Suite 110S • Chicago, IL • [alanet.org](http://alanet.org)

### Executive Summary

This white paper outlines the issues surrounding the changing roles of the traditional legal secretary and offers a definitive role-based solution that can be applied across the entire legal community, resulting in a more efficient and successful workforce that can be recruited across firms.

There is a need for law firms to come together to define the varying responsibilities of the legal secretary. Since 2004, advances in technology have affected these positions, resulting in a need for new definitions of specific functions. If the legal community can collectively define those roles, the result will be a more effective and successful workforce that firms can recruit with ease.

Because technology has impacted the way in which firms conduct business, there has been a breakdown across the industry in how legal secretaries perform work. In her article, "The Changing Role of Legal Support Staff," Cynthia Thomas, Founder of PLMC & Associates, stated the following:

"Recent advancements in technology used by law firms have blurred the lines between legal assistants/paralegals and legal secretaries. What were once two separate and distinct positions now overlap, and both jobs have changed significantly." (Thomas n.d.)

Quickly evolving technological advancements have created a shift in work culture, including the type of work secretaries do. Attorneys are able to conduct much of their work without assistance, which leaves the secretarial team supporting more attorneys than ever. Further, the specific skill sets needed vary across firms, causing confusion and hiring problems during cross-recruiting.

The solution requires an understanding of the Traditional Legal Secretary (TLS) and the Legal Secretary of the Future (LSF). Whereas the former tends to be highly reliable with much more experience, the latter may be more highly educated and adaptable, and tends to commit to positions for only two to five years before moving on. This leaves hiring managers facing tough decisions during recruiting.

The solution proposed here is one that delineates specific roles based on skill sets of the secretarial force. Titles and roles include:

- Legal Secretary
- Legal Assistant
- Legal Administrative Assistant
- Pod Legal Secretary
- Legal Word Processor
- Workflow Coordinator

An industry-wide standard agreement regarding the definitions of these roles will result in a more effective workforce with better skills, leading to the overall success of firms and their employees.

## Introduction

The ratio of legal secretaries to attorneys has changed dramatically since 2004. But the workload has not. At first glance, it appears as though fewer secretaries are required to conduct business. However, based on the “2017 Changing Role of the Legal Secretary Survey,” the real challenge is that technological advancements have had a major impact on the way attorneys operate — new applications and resources have given them more efficacy. Today, attorneys are more self-sufficient than ever and require less traditional skills from their legal secretaries. This has led to changes in the type of work firms require from legal secretaries, resulting in the need to define new roles.

In 2004, the average attorney-to-legal-secretary ratio was one-to-one, and occasionally two attorneys to one legal secretary. In 2016, the U.S. Bureau of Labor Statistics showed that there were 792,500 lawyer positions and only 191,200 legal secretary positions. This means that the ratio has increased to four to five attorneys to one legal secretary. Why did this happen, and what does this mean for law firms and their hiring practices?

According to a session on “Alternative Approaches to Secretarial Support” at the 2017 Association of Legal Administrators Annual Conference & Expo, Latham & Watkins launched a FAST program in fall of 2013. This program entailed hiring recent college graduates to be trained to support a First-Year Associate Team (FAST) made up of fall and summer associates.

When this happened, other large law firms began to look at creating their own alternative models for utilization of their legal secretarial staff. For instance, a major Los Angeles law firm sought solutions to the issues that were affecting company culture due to these impending changes. There had been a shift in the way their associates and partners were conducting business, which had resulted in the need for fewer secretaries. Although the workload had changed, there was still a need for the support of the secretarial team. Their legal secretaries were now paired with more attorneys than ever, and they

### **TRADITIONAL LEGAL SECRETARY (TLS)**

- A legal secretary with more than 10 years of experience working in a law firm or corporate legal department
- Someone who is most often reliable
- A person who is typically less technologically savvy
- Often less open to change

### **LEGAL SECRETARY OF THE FUTURE (LSF)**

- A person with his or her bachelor’s degree, as well as possibly a paralegal certificate
- Someone who will likely only commit to a position for two to five years before moving on to something else
- A person with exceptional technology skills and adaptability, but who may require some training on follow-through and being proactive
- It will be important to the LSF to be constantly evolving as the technology continues to evolve

wanted to discover a solution that would help them adapt to these changes.

### Background

In 2013, this major Los Angeles law firm needed help facilitating solutions to enable their legal secretaries to adapt to increased attorney pairings and to the potential new models that they would be piloting. It was important to the firm because the secretaries' work was still in high demand, as they are a major component to the firm's success. JHill Staffing Services spent several months researching the specific changes they expected, how those changes would impact the type of work secretaries were expected to do, and how they would execute that work.

Throughout the project, the firm focused on listening to the frustrations of various legal secretaries and providing them with the opportunity to offer feedback and suggest possible solutions. By allowing them to create their own solutions, they became more empowered around the changes affecting their careers, which led to less stress and anxiety. During change management, communication and training is key to the success of the firm; team cultures thrive when people are informed and companies are transparent.

This initial research revealed that the biggest changes facing law firms today — for associates as well as leadership — are technology-centric:

- Technology has changed the way firms conduct business, and they are searching for solutions to help them and their employees adapt in a quickly moving economy.
- Technological advancements have given attorneys the ability to execute most of their own work, therefore requiring fewer Traditional Legal Secretary roles.

For example, one managing partner of a boutique real estate firm in Los Angeles stated, "I no longer need my own secretary. I can use my own boilerplate forms to do most of my work."

This topic continued to gain momentum in the legal community, and shortly after the first firm program, JHill Staffing Services led a similar class for Legal Secretaries, Inc., where it discussed the previously stated issues as well as the following:

- When change happens, people feel left out.
- There can be fear that a person's current job is no longer safe.
- An individual's skills are becoming obsolete.

The secretaries in attendance felt the class had significance, as many could relate to the issues discussed. After the class, one individual said, "After your program, I can see why I've been terminated in several of my recent positions. I now have an action plan to be an indispensable resource where I work next." She landed a new position soon after that meeting and was with that firm for several years. The key to her success was determining what was missing and her willingness to adapt to change. She learned that she cannot alter her behavior until she first identifies what is missing.

"You need to give people a way to remain viable."

— Robert Cramer, Director of Human Resources, Irell & Manella

After this initial program, JHill Staffing was invited to facilitate a roundtable discussion among several law firms in Southern California. They wanted to determine how they could approach the changing

role of the legal secretary in their respective firms. It started with a survey of law firms throughout Southern California to assess the current state of their secretarial teams.

The survey included the following questions:

1. What alternative models are firms piloting and/or testing with regard to secretary utilization?
2. What are the biggest challenges and/or obstacles with implementing or utilizing these pilot programs?
3. What benefits (if any) have been noted from using these new models?
4. If your firm has not implemented any new models, do you anticipate creating and implementing new models in the next three to five years? And if not, why?
5. What is the biggest change over the past three to five years in the way you are utilizing your legal secretaries?
6. What are your criteria for hiring legal secretaries?

One member of this roundtable survey shared that the biggest challenge for their firm was finding top quality secretaries at reasonable compensation, who have the skills for “tomorrow’s attorneys” but can still meet the needs of “yesterday’s attorneys.”

Upon completing the roundtable and reviewing the results of the survey, it quickly became apparent that there are two distinct types of legal secretarial candidates: The Traditional Legal Secretary (TLS) and the Legal Secretary of the Future (LSF).

- A **Traditional Legal Secretary (TLS)** is someone who has been a legal secretary for more than 10 years; who is loyal and reliable; but who does not necessarily have the strongest technical capabilities and/or the willingness to develop new skills.
- A **Legal Secretary of the Future (LSF)** is extremely tech-savvy; open to change (in fact, enjoys and prefers change); typically has a bachelor’s degree; and often possesses a paralegal certificate.

The downside of the LSF is that he or she could be less stable and not as likely to stay at one firm for more than two to three years. This leaves law firm management with a challenge.

Which type of legal secretarial candidate is better to hire: a TLS or a LSF? The answer is both — each law firm has a different style and culture. Throughout my study, one common denominator was that firms tend to utilize legal secretaries in different ways.

“One reason people resist change is because they focus on what they have to give up, instead of what they have to gain.”

— Rick Godwin

The second major issue is that there are two major challenges to the changing role of the legal secretary:

- The change in roles, and the need for new job titles and their respective job descriptions.
- Understanding the difference between the TLS and the LSF, and how each would fit into new roles.

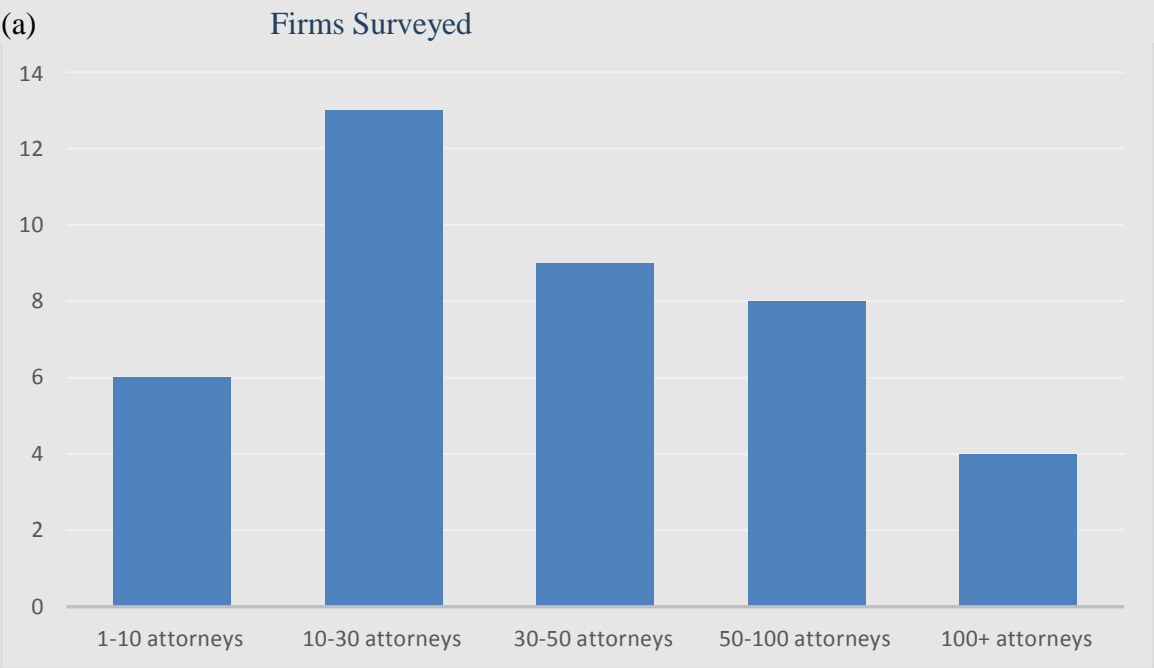
This study revealed a lack of agreement on how to define the new roles of the legal secretary, which is highly problematic when it comes to cross-firm recruiting efforts. For example, one firm might use its secretaries for traditional skills such as transcription, filings, booking meetings and

answering phones, whereas another firm might utilize its secretaries for word processing and hybrid paralegal work.

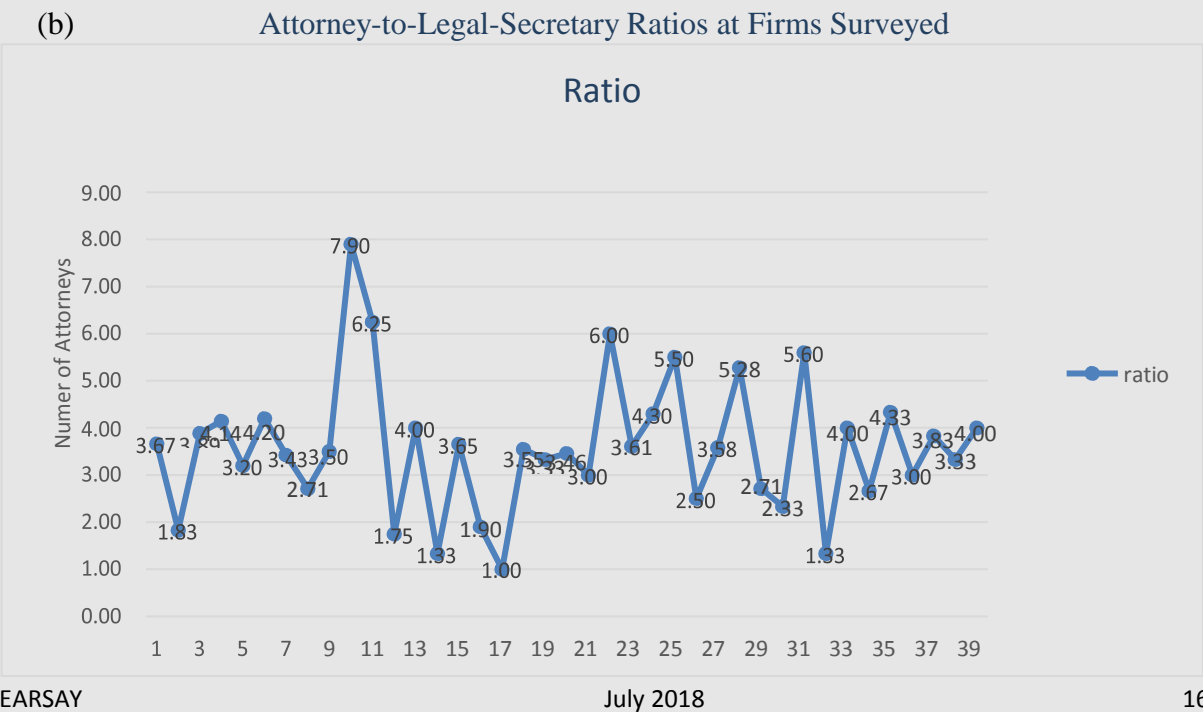
It is not unusual for a firm to hire a recruit they believe to be highly capable, only to discover that the individual is lacking the skills that the firm needs for the position. Without highly defined roles, skills are not transferrable across firms.

“Traditionally, the terms *legal assistant* and *paralegal* were used interchangeably, with both referring to a nonlawyer legal support staff member who, after education and training, performed substantive legal tasks.”

— Cynthia Thomas

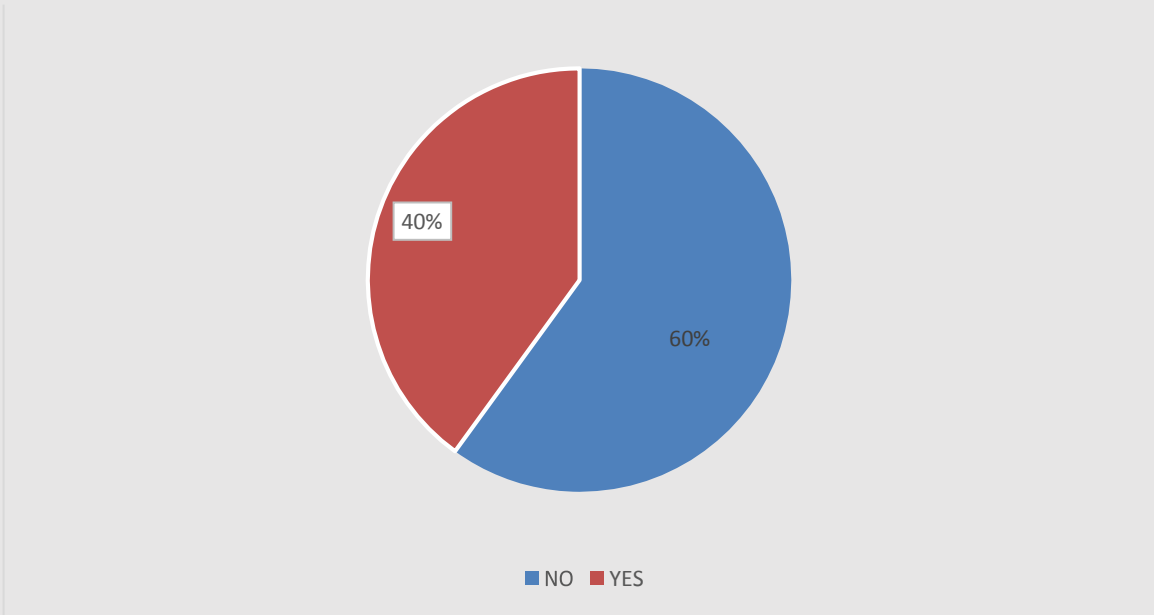


In September 2017, a survey was provided to more than 100 law firms in California. Of the 39 law firms that participated, more than half had offices in California with between 10 and 50 attorneys.



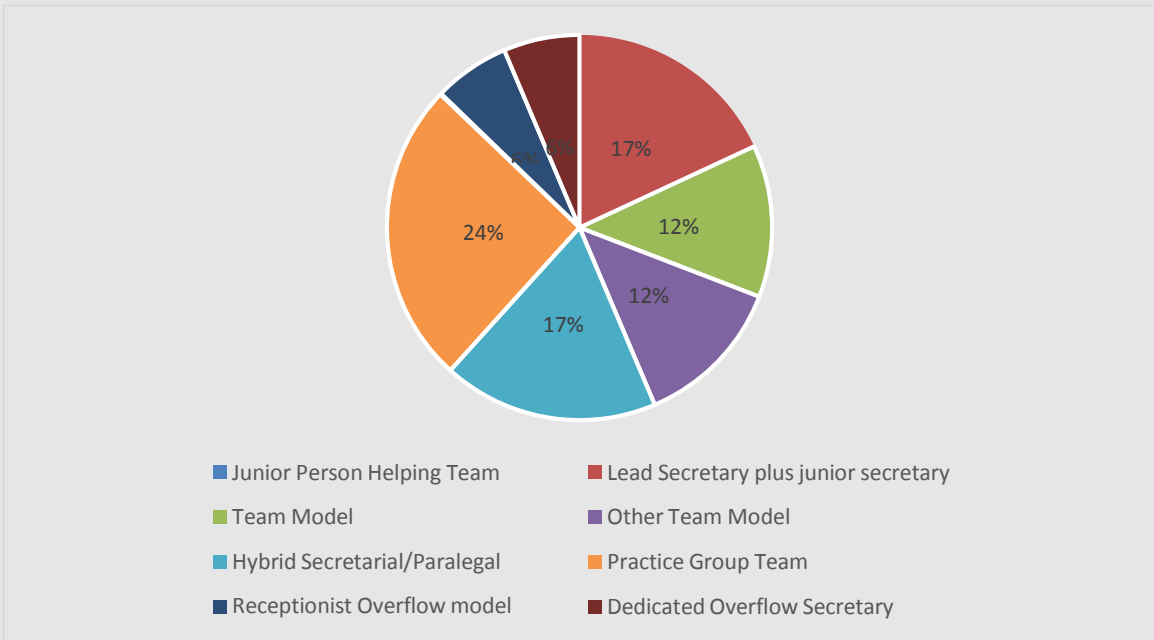
The findings from the 2017 study were consistent with the numbers provided by the U.S. Bureau of Labor Statistics data from May 2016, showing an average ratio of between four and five attorneys to one legal secretary.

(c) Percentage of Firms Using New Models



2017 Changing Role of the Legal Secretary Survey (Hill, 2017)

(d) Types of New Models Being Utilized



2017 Changing Role of the Legal Secretary Survey (Hill, 2017)

At the time of the study, fewer than half of the firms surveyed were utilizing new models. Of the firms that were utilizing new models, the most common type of new model being utilized was the “Practice Group Team.”

## 2. Solution

Based on this research, to answer these problems, the industry must agree collectively on how to define each new role, and that by naming those roles and defining them, it will be easier to understand what skill sets are required for each.

Below are the suggested titles and the accompanying definition of each title:

**Legal Secretary:** Individuals who work in law firms and are supervised by a paralegal or attorney. The legal secretary is responsible for interacting with clients, court filings, dictation and other administrative support matters.

**Legal Assistant:** Individuals who have their paralegal certificates and divide their time equally between

paralegal tasks, including researching and preparing discovery, and legal secretary tasks, up to and including filing, docketing and assisting their attorney in the practice of law. The legal assistant has an advanced understanding of the law and legal proceedings.

**Legal Administrative Assistant:** Individuals who support attorneys with administrative and clerical matters, including billing, scheduling meetings and travel, and answering phones.

**Pod Legal Secretary:** Individuals who belong to a pod or team or practice group of legal secretaries and are not specifically assigned to any one attorney. This pod or team may have one lead pod legal secretary called a **workflow coordinator** who manages and coordinates workflow among the other team or pod members.

**Legal Word Processor:** Individuals who compose, edit and format documents for attorneys in a law firm or corporate legal environment.

**Workflow Coordinator:** A lead legal secretary who has more than five years of prior legal secretarial experience working in a law firm and is responsible for coordinating the workflow of other legal secretaries.

The first step in embracing the changing role of the legal secretary is to create industry-wide agreed-upon definitions and implement them. Once the legal community can agree that the role of the legal secretary will continue to evolve and to work on defining these individual roles, the legal community will be in a better position to hire, train and retain top legal secretarial talent in the future.

### ALA Code Set Defines the Roles

In 2014, ALA began developing a code set that could change the way the industry hires employees, evaluates efficiency and staffs back-office operations. The [ALA Uniform Process Based Management System \(UPBMS\)](#) is a set of codes developed to provide a standard framework for defining and classifying legal operations.

These codes provide a standard framework for legal operations to develop, implement and maintain successful management and operational strategies, and encourage the use of a common language and approach to legal support operations across the industry.

“Law firms need to begin to reclassify and create new job descriptions, duties and titles to better reflect the support staff’s actual responsibilities.”

— Cynthia

High-performing legal operations recognize the importance of effectively managing the diverse and increasingly specialized support services required to increase productivity, reduce risk, and improve the quality and value of their services.

The ALA UPBMS creates universally recognized standards that improve the understanding of how administrative and operational processes are identified, organized and performed within their organizations.

Titles can mean different things from firm to firm. As noted in the previous section, there are several types of legal secretaries with varying roles. The UPBMS codes have a number of potential applications — for example, to strengthen the hiring process. If law firms had a uniform definition of each role, they would potentially be able to create a more accurate job description for open positions, which could help firms attract the most qualified candidates.

With each new release, ALA looks to be able to further clarify each support staff member's role — and help law firms and other organizations better understand the value firms' legal teams provide.

To review and start to implement the UPBMS codes in your firm's job descriptions, access the latest UPBMS code set PDFs [here](#).

These codes and further job descriptions will be upcoming in a UPBMS-based Job Description Toolkit that ALA is compiling with the help of some members. We will be working to make this available to members as soon as it rolls out.

### Further Education and Training

A primary element of the successful shift in the culture will be developing and implementing programs that highlight the benefits of working in the legal services industry in order to capture the interest of students and graduates. When people are planning their careers, there is an opportunity to capitalize on the advantages of beginning a career in a supporting role at a law firm or corporate legal department.

Over time, traditional secretarial training classes have gradually disappeared, while degree programs in paralegal services have flourished. It is imperative that the legal community comes together to further develop training programs for recent graduates. Specifically, firms should have specialized training programs for the first one to two weeks of employment. Regardless of the size of the firm, it should be noted that these first weeks are critical to the long-term success and growth of the individual.\* While it might seem time-consuming, it is important to note that most conflict and staff turnover happen because of a lack of empowerment and proper onboarding when people are initially hired.

*\*Some larger firms have rolled out 6- to 18-month training programs, where their legal secretary trainees are exposed to all different areas of law as "floaters." Once trainees complete their full training, they are then assigned to an open desk.*

Recommendations for empowering your new team members during their first week:

- ✓ Create a buddy system. People need to feel connected and supported. Even if it is a small firm with no other support staff, the new hire should have a buddy or mentor who can answer questions and make the new team member feel welcome. In a smaller firm, this may be an attorney, whereas at a larger firm, peer-to-peer mentoring systems are recommended.
- ✓ During the first three days, the new hire should be offered a minimum of four hours of training with a senior staff member or trainer. This should be a basic introduction to the company's infrastructure, including training on systems, procedures, software programs and basic day-to-day functions.

- ✓ A clearly defined role and set of expectations for the job and responsibilities should be communicated within the first week. The quickest way to prevent confusion and unfulfilled expectations is to clearly state expectations, as well as deadlines and timetables.

Throughout the duration of the individual's employment, additional communication and training should be provided regularly to keep pace as these needs change over time.

### Longevity

One of the biggest drawbacks of the Legal Secretary of the Future (LSF) is that he or she will likely only commit to the role for one to three years. There are many ways to incentivize LSFs to stay long-term, including offering clear career trajectories or opportunities to bill time and take on additional paralegal-oriented responsibilities as they grow with the firm.

Legal secretaries who possess paralegal certificates have the capacity to be billed out; however, most firms are unclear about the parameters. They do not know when it is appropriate to bill their time or what their rate should be.

When a firm is in the process of creating and defining these roles, the executive team should consider that the potential for billable time should be factored into compensation and discussed as an incentive to hire these types of candidates.

There are three key elements that will motivate an LSF and help keep that valuable staff member with the firm or company for a longer duration:

1. Financial compensation
2. Upward mobility/growth/training development
3. Acknowledgement and appreciation

Another model that some firms have implemented with success is hiring an LSF who only commits to a two-year contract, or until he or she moves on to law school or graduate school. In this case, both parties have clearly defined expectations that create a win-win situation for the law firm and the LSF.

Finally, whether you are hiring an LSF or a Traditional Legal Secretary (TLS), firms will need to anticipate the challenges that arise during the transitional period of changing/redefining roles.

People often resist what they do not understand. Therefore, the more transparent firms can be with their teams about anticipated changes and expectations, the easier the transition will be for everyone.

During the period of change, it is important to get your current legal secretarial team to buy in. The following is a list of recommendations that will help firms accomplish this goal:

- ✓ Give opportunities for feedback either via an open-door policy or an anonymous comments box in your office.
- ✓ When giving feedback, utilize empowering language such as "What worked was X" and "What I would love to see more of is Y."
- ✓ When dealing with upset in the office, utilize keyword backtracking. Repeat back to the person what they are upset or frustrated about, clarify their frustration and ask for participation in coming to a solution.
- ✓ Get curious. Take a stance of curiosity when faced with pushback from attorneys or secretaries

about the changes that are happening. Ask open-ended questions that encourage participation.

- ✓ Give individuals a chance to contribute. In midsize to larger firms, give people the opportunity to create teams that can be responsible for facilitating trainings for new staff members. People who have extra time on their hands can sometimes use that time to stir the pot if not given a higher goal or task to focus on. Giving people the opportunity to participate will help create buy-in into the new roles and programs.

### 3. Conclusion

As culture continues to shift with the speed of technology, the varying roles of the legal secretary must be distinctly defined in a manner that is agreed upon across the industry. Doing so will result in more effective skill sets, along with the respective roles. Further, this will lead to more effective cross-firm recruiting and overall success of firms and their employees, as well as secretarial teams that are more efficient and effective.

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[www.alanet.org/whitepapers](http://www.alanet.org/whitepapers)

## ARE YOU A PROFESSIONAL?

How you look, talk, write, act, and work determine whether you are a professional or an amateur. Society does not emphasize the importance of professionalism, so people tend to believe that amateur work is normal. Many businesses accept less-than-good results.

Schools graduate students who cannot read. You can miss 15% of the driving-test answers and still get a driver license. "Just getting by" is an attitude many people accept. But it is the attitude of amateurs. Do not ever do anything as though you were an amateur. Anything you do, do it as a Professional, to Professional standards. If you dabble at most things, you will wind up with a dabble life because there is no satisfaction in not having real production you can be proud of.

- Develop the frame of mind that whatever you do, you are doing it as a professional and move up to professional standards.
- The most successful beings in any field, including living itself, are those who hold true to professional standards.
- A professional learns every aspect of the job. An amateur skips the learning process whenever possible.
- A professional carefully discovers what is needed and wanted. An amateur assumes what others need and want.
- A professional looks, speaks, and dresses like a professional. An amateur is sloppy in appearance and speech.
- A professional keeps his or her work area clean and orderly. An amateur has a messy, confused, or dirty work area.
- A professional is focused and clear-headed. An amateur is confused and distracted.
- A professional does not let mistakes slide by. An amateur ignores or hides mistakes.
- A professional jumps into difficult

assignments. An amateur tries to get out of difficult work.

- A professional completes projects as soon as possible. An amateur is surrounded by piles of unfinished work.
- A professional remains level-headed and optimistic. An amateur gets upset and assumes the worst.
- A professional generally displays enthusiasm, cheerfulness, interest, and contentment. An amateur usually displays anger, hostility, resentment, and feels victimized.
- A professional persists until the objective is achieved. An amateur gives up at the first opportunity.
- A professional produces more than expected. An amateur produces just enough to get by.
- A professional produces high-quality products or service. An amateur produces medium-to-low grade products or service.
- A professional earns high pay. An amateur earns low pay and thinks it is unfair.
- A professional has a promising future. An amateur has an uncertain future.

Never let it be said of you that you lived an amateur life. The first step to becoming a professional is to decide that you ARE a professional. Are you a professional?

## *Photos from the LSI Conference, May 2018*



Class is in session with the legendary, Larry McGrew.



## Photos from the LSI Conference, May 2018



A lovely garden lunch.



## *Photos from Hollywood LSI Conference, May 2018*

Francie Skaggs, displaying the  
tee shirt that says it all!





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## ***Photos from 2018 Installation Gala***



Looking sharp  
at the 2018  
Installation  
Gala

## Photos from 2018 Installation Gala

The passing of the gavel from former President, Larry McGrew to current President, Carol Romo at the 2018 Installation Gala.



## Photos from 2018 Installation Gala



The lovely Terralyn Graff,  
SFLPA's former Programs  
Chair.



Our treasurer, Scheryl Warr, and Terralyn  
Graff mingling.

## *Photos from 2018 Installation Gala*



Members and friends  
enjoying the event.

## Photos from 2018 Installation Gala

Our officers being sworn in.  
From left to right, Christine Flores, Scheryl  
Warr, Sally Mendez, May Sene and Carol Romo



Sally Mendez and  
friend posing at the  
Gala



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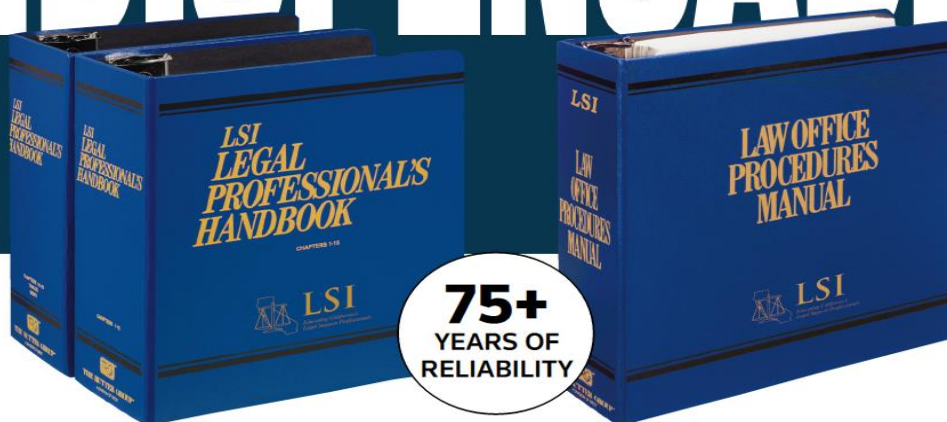
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## **INTRODUCTION TO THE SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION (“SFLPA”)**

A Professional Association for Legal Secretaries and Other Law Office Professionals  
(Formerly San Francisco Legal Secretaries Association (“SFLPA”))

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**

♦ SFLPA 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.

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### 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.gov](http://www.sflpa.gov)

Please fill out this application, sign it and submit it to your sponsor along with a check for \$55.00 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 Secretaries, Incorporated (LSI).**<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: _____
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 LSI without your consent.]	Wk Ph: _____ 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: _____
_____	How long? _____
Why do you want to join SFLPA? _____	Total Experience: Legal _____ Litigation: _____
_____	Areas of Practice: _____
Have you ever been a member of this Association or any others in the past? If so, when? _____	_____
_____	Have you completed or are you currently enrolled in an SFLPA Civil Litigation course? <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 LSI, a California non-profit mutual benefit association, includes subscription to *The Legal Secretary* magazine published quarterly, discounted prices on LSI publications such as *The Legal Professional's Handbook* and *The Law Office Procedures Manual* and more. Visit <http://lsi.org/> for more details.

IF I AM ACCEPTED AS A MEMBER, I AGREE TO BE BOUND BY THE BYLAWS AND STANDING RULES OF LEGAL SECRETARIES, INCORPORATED AND THE SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION TO WHICH I AM APPLYING FOR MEMBERSHIP, INCLUDING THE FOLLOWING CODE OF ETHICS: *"IT SHALL BE THE DUTY OF EACH MEMBER OF LEGAL SECRETARIES, INCORPORATED TO OBSERVE ALL LAWS, RULES AND REGULATIONS NOW OR HEREAFTER IN EFFECT RELATING TO CONFIDENTIALITY AND PRIVILEGED COMMUNICATION, ACTING WITH LOYALTY, INTEGRITY, COMPETENCE AND DIPLOMACY, IN ACCORDANCE WITH THE HIGHEST STANDARDS OF PROFESSIONAL CONDUCT. "*

**APPLICANT'S SIGNATURE:** \_\_\_\_\_ **DATED:** \_\_\_\_\_

**To be completed by an SFLPA Officer:**

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

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

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

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



## 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 \$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](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			
<b>NAME:</b>		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	
Where do you prefer to receive 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 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.



## 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 of Legal Secretaries, Inc. (“LSI”)

### 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><b>*NEW BENEFIT: LEGALSHIELD/IDSHIELD</b>  Contact: Courtney Coats, Independent Associate  (925) 580-6446; <a href="mailto:coats8@legalshieldassociate.com">coats8@legalshieldassociate.com</a>  LegalShield offers legal, identity theft protection, along with a massive Perks Program where you will have significant savings to over 500 local and national companies.</p>	<p><b>QUESTIONS AND CONCERNS CONTACT:</b>  Heather Edwards, LSI Vice President  LSI Marketing Committee Coordinator  (818) 482-7040  <a href="mailto:heatheredwardslsi@aol.com">heatheredwardslsi@aol.com</a></p>
<p><b>WORKING ADVANTAGE</b>  Toll Free: (800) 565-3712  <a href="http://www.workingadvantage.com">www.workingadvantage.com</a>  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, <a href="mailto:info@lsi.org">info@lsi.org</a>, or LSI Vice President</p>	<p><b>HERTZ CORPORATION</b>  Effective Date: June 1, 1996  CDP Card #447698  (800) 654-3131  <a href="http://www.hertz.com">www.hertz.com</a></p>
<p><b>FINANCIAL PROVIDERS</b></p>	
<p><b>CAPITAL INVESTMENT ADVISERS</b>  <b>Emerson J. Fersch, CFP, ChFC, CLU, CASL</b>  5000 E. Spring Street, Suite 200  Long Beach, CA 90815  Office: (562) 420-9009 or (877) 270-9342  Fax: (562) 420-9955  <a href="http://www.ciadvisers.com">www.ciadvisers.com</a>  Offering Retirement Planning/Investment Management,  Pension and 401K Rollover Consulting, and  Comprehensive Financial Planning</p>	<p><b>LEGACY WEALTH MANAGEMENT</b>  <b>Daniel R. Henderson, MBA, CFP</b>  3478 Buskirk Avenue, Suite 300  Pleasant Hill, CA 94523  Office: (925) 296-2853 or (877) 679-9784  Fax: (925) 944-5675  E-mail: <a href="mailto:daniel@legacywealthmanagement.biz">daniel@legacywealthmanagement.biz</a>  <a href="http://www.legacywealthmanagement.biz">www.legacywealthmanagement.biz</a>  Offering discounted John Hancock Long Term Care Insurance &amp; Life Insurance, Annuities, Retirement, Investment &amp; Estate Planning, Mutual Funds, &amp; 401K</p>
<p><b>DAVID WHITE &amp; ASSOCIATES</b>  <b>Wealth Accumulation and Preservation</b>  3150 Crow Canyon Place, Suite 2000  San Ramon, CA 94583  (800) 548-2671  Contact: Ryan Gonzales (ext. 2682), <a href="mailto:rgonzales@dwassociates.com">rgonzales@dwassociates.com</a>, or  Matt Kay (ext. 2628), <a href="mailto:mkay@dwassociates.com">mkay@dwassociates.com</a>  Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance</p>	<p><b>ATHLETES BUSINESS CONSULTANTS</b>  <b>Jory Wolf, President/Founder</b>  350 10<sup>TH</sup> Avenue, Suite 1000  San Diego, CA 92101  Office: (858)886-9842  Cell: (510)919-9062  <a href="mailto:jory@athletesbiz.com">jory@athletesbiz.com</a>  California Insurance License: 0E88330  10% discount on Long Term Care, call for information on life, long term, and disability insurance, as well as commercial and residential lending</p>
<p><b>CREDIT UNIONS</b></p>	
<p><b>LA FINANCIAL FEDERAL CREDIT UNION</b>  P.O. Box 6015  Pasadena, CA 91102-6015  (800) 894-1200  <a href="http://www.lafinancial.org">www.lafinancial.org</a>  Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p><b>PROVIDENT CREDIT UNION</b>  303 Twin Dolphin Drive  P.O. Box 8007  Redwood City, CA 94603-0907  (800) 632-4699 - (650) 508-0300  <a href="http://www.providentcu.org">www.providentcu.org</a>  All LSI members are eligible to join.</p>

Revised 03/2017

# RICOH

*Imagine. Change.*

## Ricoh USA

225 Bush Street Suite #250

San Francisco, CA 94104

Office: 415.392.6850

Fax: 415.439.5887

## Services & Locations

- Document collections and hosting
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- Document Coding and Indexing
- Logical Document Determination / Unitization
- Color Imaging/Printing/Copying
- Large Format Copying and scanning
- Enlargements, Reductions, Mounting, Lamination, transparencies

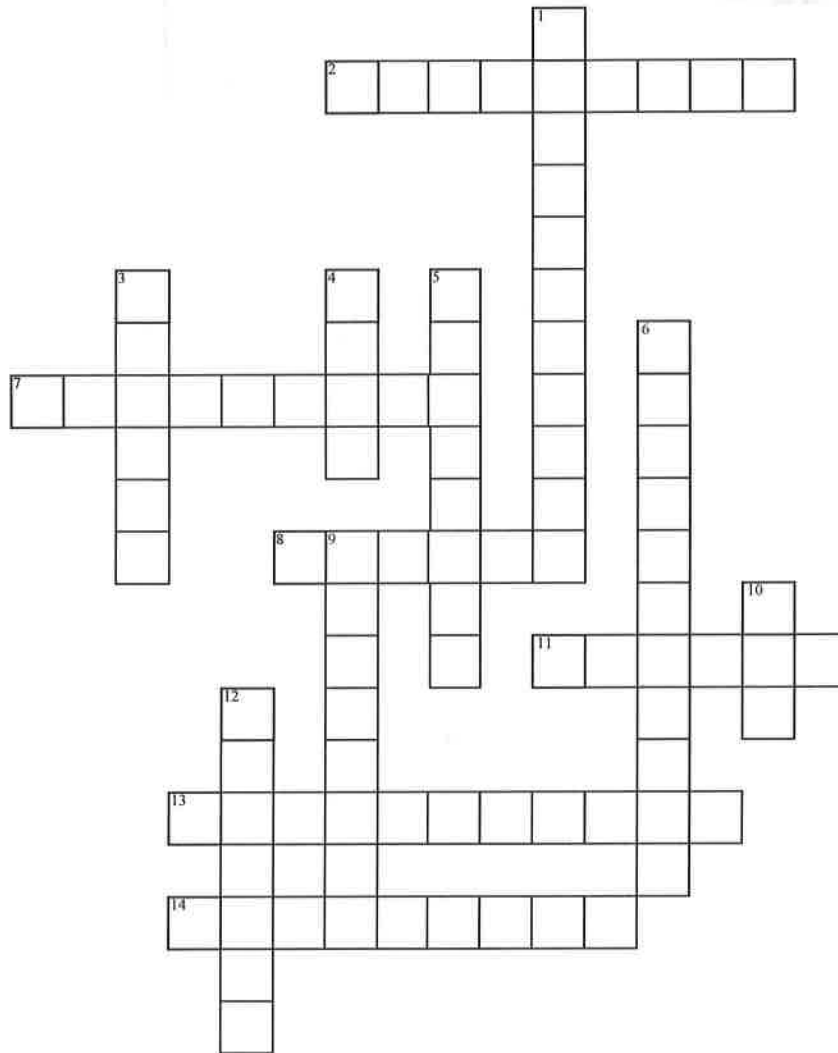
## Facts About RICOH

- Availability 24 hours a day, 7 days a week
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- Trial Exhibits
- CD and DVD Duplicating
- Image Conversion/Printing
- Electronic Data Discovery Processing and Consultation
- Bookmarking / Hyperlinking
- On-site Scanning Services
- Back File Scanning Services

# Crossword Puzzle

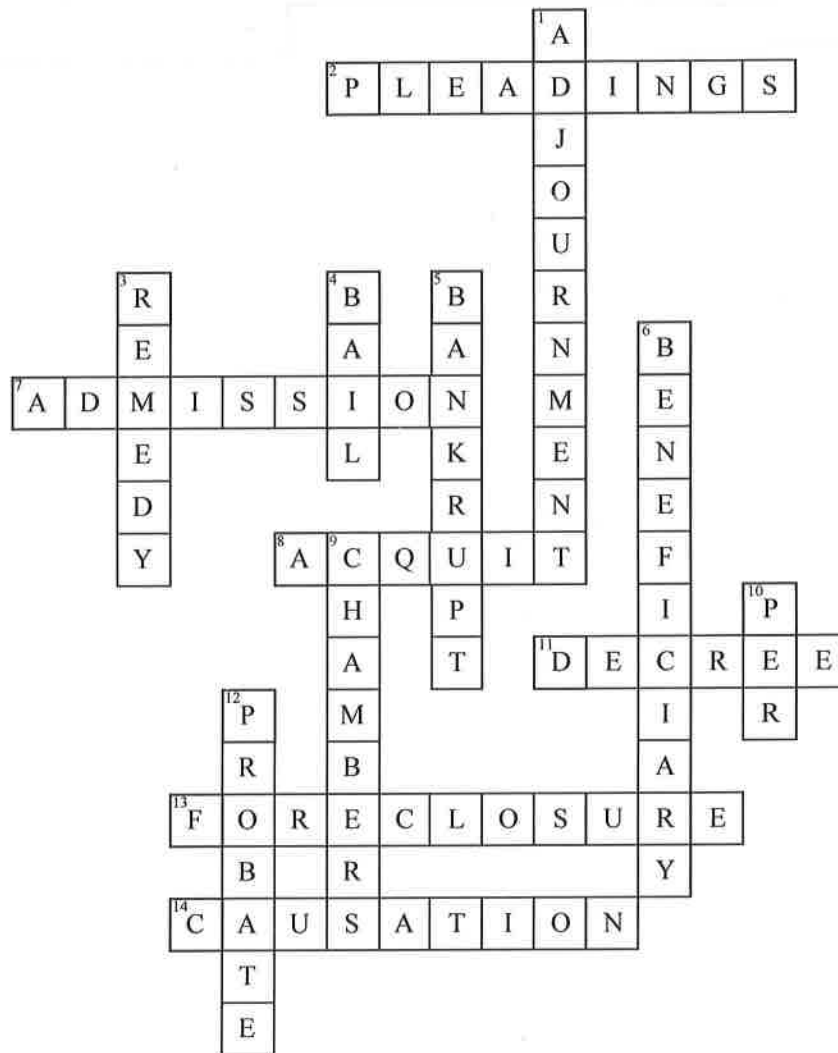


## Across

- 2. Statements of the facts prepared by both sides in a civil case.
- 7. One side in a case agreeing that something the other
- 8. When a court lets a person go without any penalty.
- 11. An order by a court.
- 13. To repossessing property.
- 14. One thing being done causing something else to

## Down

- 1. To end a court hearing
- 3. To use the law to get compensation for damage done
- 4. To pay, or promise to pay, an amount of money so
- 5. Someone who has had a bankruptcy order
- 6. Someone who benefits from a will, a trust or a life
- 9. The offices used by Judges
- 10. Through or by
- 12. Authority to deal with a dead person's estate



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A professional Association is defined by Wikipedia as a non-profit organization seeking to further a particular profession, the interests of individuals engaged in that profession, and the public interest.

Drive traffic to your Website. A website is the digital marketing hub. It is also especially important for engaging the general public. If you want to influence new members, you will want to get them to your homepage where you can convert them.

#### HEARSAY

San Francisco Legal Professionals Association

Post Office Box 2582

San Francisco, CA 94126-2582

#### **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.