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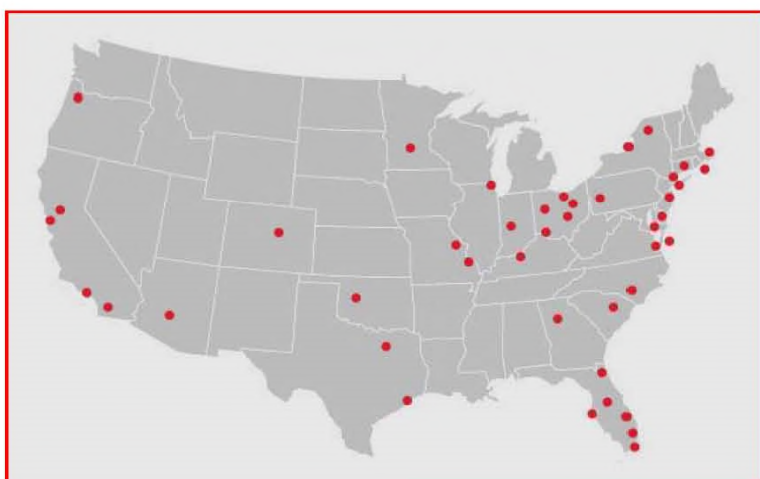
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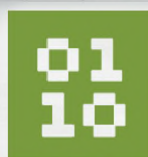
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June 2017 – President's Message

Greetings SFLPA Members & Friends,

As we move into our second month of the new fiscal year, there are many of you that still have not renewed your membership. Remember, if you don't renew by June 30, 2017, you will be removed from our roster and our email distribution lists. So please get those renewals in very soon.

We have some very exciting things on the horizon for this year. We are looking for individuals to help us with some of our committees. I have created a 'Wanted Ad' that lists the duties of the various committees and we would like to get some fresh ideas from some new blood. So if you are interested, please review and contact the appropriate committee chair.

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

With the New Fiscal Year, there are important business items that we will need to handle during our first General Membership Meeting, which will be held on Tuesday, July 18, 2017. The most important is to approve our budget for the year. We also have some exciting announcements as well as some awards to present to the following:

- Our monthly newsletter 'THE HEARSAY' won 1st place at the 2017 Annual LSI Conference so we would like to congratulate our Editor: Sally Mendez on a fantastic job.
- Also, our Scholarship Applicant won the prize Eula Mae Jett Scholarship at the 2017 Annual LSI Conference. Congratulations to Gina Gutierrez, who won the 'Change of Career' category.

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 and they are loads of fun too. I encourage everyone to at least attend one. I guarantee you will have the time of your life. And as they always say... 'What happens at conference always stay at conference.' Here is a list of the upcoming conferences for this fiscal year:

- 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

As I stated earlier, we are working on providing more educational as well as social networking opportunities for our members this year. Your board is working diligently to get our 6 month calendar ready for you by early July. Here are the items on the calendar thus far:

- Brown Bag Presentations:
 - June 27, 2017 – Ana Fatima Costa will be back to provide us an presentation on: "From Office Politics to Connection – Transforming Negative Relations in the Workplace"
 - July 25, 2017 – Jeff Knowles, Esq., of Coblenz, Patch, Duffy & Bass, LLP will present: "IP Litigation: Why it's so Important to Protect What Your Mind Creates!"

Please see event flyers for date, location, and RSVP email.

- Online Training Courses offered by LSI:
 - July 11, 2017 – September 12, 2017: CCLS Online Study Group
 - July 10, 2017 – September 4, 2017: Beginning Legal Secretarial Training Course

For registration information, please visit the LSI website at: www.lsi.org – view the upcoming class page. If you wish to get the discounted rate, you must be a member in good standing. So if you have not renewed our membership as of today, you need to do so before the registration date.

Stay tuned for more information as we hope to have our calendar of events scheduled through December of 2017 in the upcoming weeks.

Have a wonderful 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 . . .

(June 2017)

I traveled to Modesto to attend the Annual Conference for Legal Secretaries Incorporated. Stanislaus County did a nice job of putting together a short but sweet conference complete with a hot rod from the 50's, blow-up pink guitars and lots of fun and partying throughout the three day event. A local alumni now a Judge for Stanislaus County Superior Court, gave the introductory speech at the Banquet held on Saturday night. And our bulletin editor, Sally Mendez, took first place for The Hearsay! Congratulations Sally! Our scholarship chair was also awarded with a \$2,000 scholarship for our Association Scholarship winner. Congratulations to Gina Gutierrez, who won the Eula Mae Jett Scholarship. Our Association was represented by seven members in attendance and everyone seemed to have a good time. Photos should be available somewhere . . . Probably on LSI's website.

The Membership Committee had its first meeting where we went over plans for our upcoming ongoing on going membership drive to consist of having our Brown Bags at various law firms in the Financial District which will help get our name out, planning an "Open House" in August where current members will bring a guest (a co-worker or legal secretary from another local law firm) to introduce or re-introduce them to our Association in the form of a variety things - some educational, some fun - and all geared to enticing the guests to join. We anticipate no fewer than 50 people or 25 possible new members as a result of this event. We have other projects in the works including recruiting directly from certifying legal schools in San Francisco and promoting membership through advertisement on our local public transportation systems. There are still more ideas and suggestions being worked on for our membership drive this year.

Thank you to those who met with me at my request to discuss your ideas and suggestions for getting our Association's name back in front of the many world known law firms that happen to live right here in our namesake city. I will be implementing your suggestions and reaching out to the rest of our Legal Secretary and Paralegal members for your personal feedback as well. I truly hope you will meet with me and share your ideas and suggestions as well.

When I think about how we represent San Francisco, where the world's most reputable law firms have an office in, I am left breathless by the vast resources and opportunities the San Francisco Legal Professionals Association is fortunate to have at its fingertips, if we just reach for it.

Sincerely,

Carol E. Romo
Vice President and Membership Committee Chair

Please contact me anytime with your comments, questions, etc. at:
cromo@crowell.com
415-365-7471 (ofc-dir)

Governor's Report

By: Christine Flores, CBA

The Annual Conference of Legal Secretaries, Incorporated, was held May 19-21, 2017 in Modesto, California. Stanislaus County LPA did their usual excellent job of hosting conference, providing ample opportunity to conduct business, attend educational workshops and have some fun! San Francisco LPA was well-represented at conference. President Larry McGrew, Gigi Zhou and I represented SFLPA as delegates, with Lillian Wong serving as an alternate delegate. Shannon Thompson was exhibiting for Behmke Court Reporting, but she was able to take time to attend many of the conference activities. Frances Skaggs, Carol Romo and Christa Davis were also in attendance.

The conference began with the Officer/Chairman workshops on Friday morning. These workshops are offered so that incoming local association officers and chairmen can learn more about how to effectively carry out the responsibilities of their position. Workshops were also offered during the afternoon and after the Welcome Reception. I attended the Governors Lunch, during which the Governors reviewed the items on the Executive Committee Resume. It was also a chance to meet new incoming Governors from other associations. The Welcome Reception got the festivities into high gear with an American Graffiti themed trivia contest. The Reception was followed by the Inter-Association Game Night. If you haven't attended a game night, you are really missing out on a lot of laughs!

Saturday was a full day, beginning with the Pre-Annual Conference Board of Governors Meeting at 8:00 a.m. At this meeting, the Governors adopted the bylaw amendments to change the title of the Legal Secretarial Training/Seminar Chairmanship to Legal Professional Training/Seminar Chairmanship.

The Committee to research the possibility of adding a Student/Associate Membership category gave its report. Action on this item was postponed to the August 2017 Quarterly Conference.

There being no further business to come before this meeting, it was adjourned.

The Annual Meeting of Legal Secretaries, Incorporated was called to order at 9:30 a.m. by President Jennifer L. Page, CCLS. American Legion Post 74 presented the colors, the Pledge of Allegiance was led by Brenda Bracy, CCLS, President of Sacramento LSA, and the Code of Ethics was read by Carre Boniface, President of Santa Maria LPA. The Inspirational Message was given by Christie Ensley, President of Placer County LPA, the Memorial Address was given by Kathy Martinez, CCLS, President of Rio Hondo District LPA. Conference Chair Diane Mecca, Stanislaus County LPA introduced Stanislaus county Superior Court Judge Valli K. Israels, who welcomed LSI to Modesto. The LSI Executive Committee was introduced by Christa Davis, LSI Past President and member of SFLPA. Christa gave a very fitting and lively introduction of all members of the EC. LSI President Jennifer L. Page, CCLS, then introduced the LSI Past Presidents and Special Guests in attendance, Kim Oreno, LSI Administrator who served as Timekeeper and Linda Moore who served as a page.

On motions duly made, seconded and carried, the 2017 Annual Conference Standing Rules and Annual Conference Election Rules were adopted. Diane Mecca noted corrections to the 2017 Official Program, which was adopted as amended. The Minutes of the 2016 Annual Conference Minutes were approved as corrected.

Mary J. Beaudrow, CCLS, LSI Nominations and Elections Chair presented the slate of officers:

President:	Jennifer L. Page, CCLS
Vice President:	Heather Edwards
Executive Secretary:	Lynne Prescott, CCLS
Treasurer:	Rod Cardinale, Jr.

There being no other nominees for office, each was elected by acclamation.

The meeting continued with the reports of the elected officers. Treasurer Rod Cardinale, Jr. presented the Treasurer's Report and on motion duly made and seconded, the actions of the Treasurer in paying the routine bills during the Fourth Quarter were ratified.

Following the lunch break, the reports of the appointed officers and chairmen were given. Copies of these reports are available on the LSI website, or by requesting a copy from me.

The Annual Conference is always special as there are several awards made for various efforts by the local associations. SFLPA's Bulletin received a First Place Award. I don't think Larry could have moved any faster to go up front to accept the award on Editor Sally Mendez-Arevalo's behalf. SFLPA also submitted a scholarship application, and our applicant, Gina Gutierrez, was awarded a generous scholarship to help facilitate her career change to the legal community. The coveted Chapter Achievement award was earned by Santa Clara County LPA with an entry containing over 40,000 points. Our entry was just over 24,000 points – but I think with a little effort we can boost our participation up just a bit!

Saturday night was quite festive with the banquet dinner and another game night followed. The conference continued on Sunday morning over brunch. The LSI Officers for the year 2017-2018 were installed by Don Lee; Lorraine M. Bettencourt, PLS, CCLS served as Installing Marshal. President Jennifer Page, CCLS presented the President's Award to Diane Mecca, CP, CBA for her outstanding service and dedication to LSI. The Annual Meeting was adjourned, and the May 2018 Annual Conference will be hosted by San Fernando Valley LSA and will be held at the Garland Hotel in North Hollywood. The Post Board of Governors meeting followed with President Jenifer calling the meeting to order at 11:04 a.m.

The Proposed Budget for the 2017-2018 year was adopted. The Bids of San Diego LSA to host the February 2019 Quarterly Conference and the bid of San Gabriel Valley LPA to host the August 2019 conference were accepted. Desert Palm LPA, Santa Cruz County LPA, Conejo Valley LPA and San Diego LPA were the winners of the scrip tickets for attendance at the August 2017 Quarterly Conference.

There being no further business, the meeting was adjourned. The First Quarterly Conference will be held at the Stockton Hilton, August 18-20, 2017, and hosted by Stockton-San Joaquin County LPA.

As always it was a pleasure to represent SFLPA as a delegate and as Governor. It is my hope that some of you will be able to attend the conference in Stockton. It is an easy drive or train ride from anywhere in the Bay Area. Feel free to contact me for more information, or visit www.lsi.org.

Conference Delegate Reports

IMPRESSIONS FROM MY FIRST LSI CONFERENCE

By: Lilian Wong

My first official attendance at conference was at LSI's 83rd Annual Conference in Modesto May 18 - 21, 2017. I wasn't sure what to expect at the LSI conference, but I knew it would be educational and fun. Upon arrival at the registration desk, there were raffle prizes on display, so I couldn't help myself and bought some tickets to win the big TV along with the accessories. LSI gave me a welcome goody bag and that made me feel very welcomed! The theme of the Modesto conference was "American Graffiti," since Modesto is home of the movie directed by native George Lucas, whom grew up in Modesto and went off to college to be a movie director and essentially spun off "Grease" and "Happy Days."

Friday morning, I attended the Officer/Chairman Workshop, which was very detailed and the agenda covered many topics. I represented SFLPA as an Alternate Delegate, so I attended all the meetings to get a better understanding of what the LSI conference was all about. Later, in the afternoon, I attended the New Comers lunch and Larry McGrew, SFLPA's President was the host. He did a fabulous job as the speaker. After lunch, I attended the Legal Specialization Section Workshop – Probate. The speakers were attorneys Kimberly G. Flores and Beau Correia from Berliner Cohen, LLP law firm, who talked about probate and estate planning.

Specifically, the topics covered were "Probate Code Section 17200" and "Probate Code Section 850." Probate Code Section 17200 is an instrument that allows a trustee or beneficiary of a trust may petition the court under this chapter concerning the internal affairs of the trust or to determine the existence of the trust.

Probate Code Section 850 is a tool used when in possession as successor trustee, which was not formally transferred to the trust asset. A trustee can file an 850 Petition requesting that the decedent's property be transferred to the trust and be held as a trust asset as often called Estate of Heggstad. In Heggstad, an individual created a trust, but failed to transfer title to his real property into the trust prior to his death. However, in the trust instrument he stated that he held the same real property as trustee. An owner of property declares himself to be trustee of that property, the property is a trust asset and can be formally transferred to the trust after death.

Friday evening was the welcome reception and I met a lot of members from other legal associations. Some wore 50s poodle skirts and pink jackets, which was very festive.

Saturday morning, I started to recognize some faces. I went with Gigi Zhou, SFLPA Delegate, so we met up with a few members from the San Mateo Legal Association to breakfast. Many were friendly and made us feel welcomed. I will get to familiarize with names soon enough to remember when I attend more of the LSI conferences. I attended the Annual Meeting, 1st and 2nd Sessions, followed by the banquet reception where they had the Honorable Judge Valli Israels from the Stanislaus County Superior Court. She reminisced and told us how her father and uncle hung out with George Lucas when they were in high school. Prior to the dinner banquet, the members of SFLPA and San Mateo LPA, we went up to the room of Carol Romo, SFLPA, VP and were having a party. (Pictures will follow.)

Sunday brunch we had the Honorable Judge Ruben Villalobos speak and also a native of Stanislaus County. We can't forget a special appearance by Elvis! The weekend consisted of speakers, who were LSI President, past presidents, LSI officers, judges; attorneys; legal vendors; and local associations all participated at the Conference. Meetings covered a vast array of topics such as amending the bylaws; educational workshops; scholarships; newly certified CCLS members; awards to members; and raffle prizes.

The best was the awards ceremony and Diane Mecca received the President's Award for her outstanding dedication to LSI. Well deserved. The LSI Conference ended with fun, laughter, friends and definitely a warm feeling of attending future LSI Conferences! Those who never attended a LSI Conference before, I highly recommend members to attend one. You will enjoy it. Until then, see you soon!

Lillian, SFLPA
Alternate Delegate.

By: Gigi Zhou
SFLPA Member

83rd Annual LSI Conference

Two weeks ago, I attended my first annual LSI conference in Modesto. The conference lasted for four days, and it made my weekend fill with education, networking and fun. It was very amazing to see different local legal associates gathered in this conference. This event was significant to me because I was a delegate from SFLPA. In these four days, I attended meetings held by LSI Executive Committee officers, participated in educational seminars, and networked with other legal professionals in luncheon and banquet. I visited various vendors and obtained information on different legal services and their new products. I have learned a lot and gained difference perspectives from this conference.

I attended two high quality educational seminars: 1) Employment Law Review and Preview; 2) eFiling in California. In the first seminar, I learned about many updates about employment law, such as compensation, wage and hours. I was introduced about fair employment practices, and new hire/on-boarding procedures. This seminar made me become more interested on employment law. The second seminar was held by a representative from OneLegal, which is a very popular legal vendor that manages court filings. This seminar provided information about eFiling in California, it focused on what's happening for eFiling, rules of court and what will happen in the future for eFiling in California. I found this seminar very helpful because the instructor demonstrated the eFiling process step by step. I was very glad that the instructor provided handout so I could review them after the seminar. I highly recommend these educational seminars for legal professionals, it was a perfect opportunity to broaden your horizon and earn CLE or CCLS credits.

From the conference, I learned information about the California Certified Legal Secretary exam. I am glad that LSI provided guidance to help people passing the exam. I met and networked with other legal professionals. This conference is very inspiring to me. I highly recommend legal professionals to attend this annual conference because it would be a fun and educational trip.

June 2017

PERSONAL FINANCES **SOCIAL SECURITY**

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Everything You Need to Know About Social Security



If you pay taxes and you plan on retiring in your golden years, you should probably know a thing or

How Social Security Works

When you get paid, part of your paycheck goes into something called FICA, the Federal Insurance Contributions Act, a tax that funds Social Security. Your money goes into a pot that pays the people who are currently receiving Social Security—maybe your parents or grandparents (or people on disability insurance).

When you're ready to retire in your 60s, you'll apply for Social Security yourself, and you'll be paid from this same pot. But by that time, future generations will be funding *your* Social Security.

The Social Security Problem

Basically, the money we pay goes to an entirely different generation, and this makes things complicated. Right now, the issue is that Baby Boomers are retiring, which means we have *a lot* of retirees, which means we have a lot of money going out of that Social Security pot.

If that's not enough of a problem, we also have fewer workers funding Social Security at the same time. Long story short, there's more going out than coming in right now.

Good news, though! The Social Security Administration has a surplus they draw from when this happens. This surplus accumulated when we had more money coming in than going out—the opposite of what's happening now. The surplus money earns interest, the same way you might save your extra money at a bank. Also, the government is allowed to use that money, the same way your bank might use your savings for loans. That surplus serves as a buffer, sort of like an emergency fund might save you if you lose your job and have to pay basic living expenses.

Five Best Banks for High-Interest Savings Accounts



Just because the banks are having a hard time handling their money doesn't mean you have to.

But there's bad news again. Unfortunately, that surplus is running out, and this is why you keep hearing that Social Security funds are drying up. Social Security itself is not running out, but the surplus, which we've been using to pay from, is drying up. In fact, this surplus is expected to be empty by 2034. Does that mean future generations won't see a check? Not quite. As Kiplinger puts it, "as long as payroll taxes exist, Social Security will never go broke." However, it's estimated that we'll get about 20% less than payees are getting now. That's a big deal.

Fidelity recently released a Social Security Benefits Calculator for people between the ages of 40 and 69 that can help you figure out exactly how much you'll get, depending on when you start claiming benefits.

The Future of Social Security

The current problem with Social Security is often misunderstood, but myths aside, some people still worry Social Security is on the chopping block under the current administration.

President Trump campaigned against cutting Social Security, but his administration has made moves that seem to support the opposite. For example, Trump appointed Mick Mulvaney as Director of the Office of Management and Budget, and Mulvaney has been pretty outspoken about cutting Social Security.

Even without this threat, though, the Social Security problem is still a big one. And politicians propose very different solutions, like increasing the income cap for paying into Social Security or raising the age when people can take benefits.

Should we raise the retirement age for Social Security and Medicare?



Leading Republicans already have included such proposals in their evolving legislative packages... Read more on www.pbs.org.

Of course, this isn't just a problem for retirees, but it's part of the reason saving for retirement is so important. At the very least, you want to be prepared. And the means making sure you've got a big enough nest egg when the time comes—because even though you will see a check from Social Security, it may not be a big one.

The surplus has largely already been spent and there are no plans in place to pay it back. The current workforce is too small to support transfer payments from the young to the old.

I can't see how Social Security can survive in its current form. It's always been a form of welfare, and it's only a matter of time until we face that fact and means-test it—then it becomes a reward for those who didn't bother to save.

Comments/Feedback

- I wish they'd let me opt out of that goddamn self-employment tax (nothing will make a Randian libertarian out of someone faster than paying the whole 15.3 for SS and Medicare) and let me invest that money.
- You could even pass a law saying you have to put a certain percentage of your income into federally qualified investments—401(k), IRA, sometime-locked investment vehicle invented for the purpose like Canada's RRSP—and if you don't, you pay it in taxes to a fund that will serve as a means-tested backstop for indigent elderly and disabled.
- After all, there's a precedent for this that's done a pretty good job (no matter what Republicans say) for the healthcare system.
- If I wanted to blow perfectly good money on a Ponzi scheme, I'd go seek out a con man and give my cash to him. At least then I'd have a fighting chance of being high enough up the pyramid to get something out of it before it collapsed.
- Social Security needs to be reworked into Financial Security. Instead of your money being paid in to a pot to be paid out to someone else, the money is put into an account you own and can invest as you see fit (within financially sound limits). A small percentage (1 or 2 percent maybe) would be taken to contribute to funds to provide for disability insurance and the other functions of SS.
- Unfortunately, this isn't something we can't just flip the switch to do, it would have to be phased in over a generation or maybe even two, including a group of people who will probably have to pay into the old system without a return while paying into the new system to prepare for their own retirement.



Establishing Credit History in the United States

What is credit history?

Your credit history is the record of how you have paid borrowed and repaid debts. This information is obtained from one or more national credit bureaus. Your credit report may include information about your previous credit performance, current level of indebtedness, length of credit history, types of credit in use, pursuit of new credit, accounts in collection, defaults, bankruptcies, lien, judgments, charge-offs, and other applicable information. A creditworthy person is one who has a positive credit history, and meets other requirements as determined by the lending institution.

Why is credit history important?

Having a good credit history will be a central part of making a successful personal and financial future for yourself in the United States. Your credit history can help open doors to you or keep them locked. People and businesses will use this record of how well you kept your previous payment agreements to judge whether they can risk making a similar agreement with you. Cell phone companies, landlords, lenders, insurers, even possible employers often make decisions about your future based on your credit history.

It is a good idea to check your credit report frequently. Except under certain circumstances, there is a small charge for this service. The three primary credit bureaus are Equifax, Experian, and TransUnion. Use caution when requesting a copy of your credit report. Never give personal information to someone, unless you initiated the contact, on the telephone, by mail, or on the web.

What goes into credit history?

Many factors are considered and put into a mathematical formula. These may include:

- If you pay your bills and loans on time,
- How much money you owe,
- How long your accounts have been open,
- What types of credit you use,
- How often and how recently you have applied for credit, and
- Collection notice and judgments (records of non-payments/disputed payments),

Establishing Credit History:

- **Open a bank account.** Open a bank account and use it responsibly. This is the first step in establishing a financial history. This will not appear on your credit report, but bank account numbers are often requested on credit applications.
- Put the utilities in your name and pay the electric, gas, telephone, and cable TV bills on time.
- **Apply for a credit card.** To avoid being denied credit, apply only for those cards whose requirements you are likely to meet. Department store or gas credit cards are usually easier to obtain than a bank-issued card with a Visa or MasterCard logo because the balances do not generally revolve.
- Before applying, make sure the creditor reports account activity to the credit bureaus. As the purpose of obtaining the card is to establish credit, you want to choose a card that will help you do that. If you want to get a Visa or MasterCard, ask at the bank or credit union at which you have your account.
- **A secured card is an option.** If you have trouble qualifying for a credit card, you may opt to apply for a secured card. These cards have credit limits based on a required deposit made by you into a savings account. You use the card just as you would any other credit card.
- **DEPARTMENT AND GASOLINE CREDIT CARDS:** Since gasoline credit cards are not revolving (cannot carry a balance forward month-to-month), often they are easier to obtain than regular credit cards. Similarly, some department stores offer revolving credit for a specific purchase and this is sometimes easier to establish. It is also a great way to establish credit.
- **CO-SIGN:** One way is to piggy-back onto someone who already has a good credit history established and is willing to co-sign. If you are fortunate enough to know of such a person, you are not only well on your way to establishing credit, but you are very fortunate indeed. But be aware that any default of . . .
- Credit on your part affects the credit of the co-signer. People who care enough about you to co-sign, do not deserve a bad credit incident through no fault of their own. Once the co-signing has occurred, you simply make payments on or before the due date. In time, you will have established a credit history. If you want to accelerate the issue, payoff the debt in full when the first bill arrives but not before. Completion of the full billing cycle is important for a “pays on time” report card to be established. This will not only make your creditor happy, but your co-signer as well. The next step is to ask the co-signer to repeat his generosity (if necessary). Then: create a debt, wait until the first bill comes, pay it off in full. Keep repeating until you no longer need the co-signor. Credit history is now established.

Tips for Keeping Good Credit

- **Make Payments on Time** – It sounds so simple, but life is hectic and things do slip our minds. Establish a routine for paying your bills and keep to it. Mail payments a week before they are due so they arrive on time. Those late fees can add up.
- **Pay What You Owe** – Of course, it is best to pay the entire amount due each month, but at least pay more than the “Total Minimum Due.” Never skip a payment.
- **Do Not Overextend Yourself** – Keep your “available balance” in mind. It is the difference between your credit limit and your balance due. Having an “available balance” means there is credit available in the event of an emergency, and you can avoid incurring “Over Limit” charges. Before applying for a new credit card or loan, examine your spending and work out a realistic budget. This will allow you to pay your bills and still live comfortably.
- **Limit the Number of Credit Cards** – Limit the number of credit cards you acquire to help limit your debt exposure, and simplify your record keeping. Be aware that excessive credit inquiries over a short span of time may be interpreted as an indicator that you need more credit due to experiencing financial problems.
- Set your own credit limit, and start to establish a savings fund for emergencies.
- **Use credit wisely** – Ask yourself the following questions before purchasing with credit: Is this something I really need, and do I need it now? Do I have the ability to repay? How long will it take me to repay? How much will it ultimately cost me?
- Be aware of the terms and costs when shopping for a student credit card.
- Review your statements carefully, and immediately inform your credit card company, in writing, if you notice an error on a billing statement.
- Review your credit reports periodically, and check for inaccurate, incomplete, or outdated information. Dispute this information, in writing, with the credit bureaus.
- Be honest. If you cannot pay your bills on time, contact the creditor and explain the situation. Creditors will often work with you to come up with an alternate payment arrangement.
- Always think ahead. Be proactive, not reactive, about your finances. Plan for different obligations now and after graduation.
- Be organized by filing your statements in a separate folder.
- Keep a list of your credit card account numbers and phone numbers in a safe place in case a card is lost or stolen.
- Report your card as lost or stolen as soon as you notice it is missing.
- Immediately inform your credit card company of an address change.
- Maintain a savings and checking account.
- Establish your telephone bill under your name. Remember, you are responsible for additional people on your telephone bill.
- Develop a steady work record.
- Avoid opening joint accounts with a friend or significant other.
- Protect your account numbers, personal identification numbers (PINs), and Social Security Number (SSN). Do not let others use your cards, and do not use your cards to pay for other people’s purchases!
- Try not to graduate with credit card debt. If you do, make sure you will be able to afford that debt in addition to other new expenses (i.e., student loan payments, rent, utilities, etc.).
- Be sure to pay your student loans as agreed. This long history of paying your bills on time will also help you build a credit history, and improve your credit score.



CREDIT SCORE

How to Read and Understand Your Credit Report

By Kristin Wong



It is important to review your credit periodically. But your credit report contains a lot of information, and it can be confusing to navigate. Here's how to decode and understand your report.

For a number of reasons, experts recommend checking your credit report once a year. Because your credit is a collection of your debt history, it can affect your loan interest rates and ability to open financial accounts. An annual review helps ensure your report is up-to-date and accurate. Also, if you're a victim of identity theft, your report might contain errors. Overall, reviewing your credit keeps you aware of your financial situation.

The Anatomy of Your Credit Report

You might see a handful of sections on your report, but most of the information is grouped into four main categories: personal information, public record information, creditor information, and credit inquiries.

Personal Information

This is pretty self-explanatory, but this section generally includes:

- Your name and aliases,
- Social security number,
- Date of birth,
- Employment data,
- Current address, and
- Previous address.

Public Record Information

If you have any open legal issues related to your financial situation, they will be included in this section. These records might be:

- Bankruptcies,
- Liens,
- Judgments, and
- Wage garnishments.

CreditCards.com adds that if you are looking at a TransUnion report, you will also see an estimated date of removal for each item.

Creditor Information

Here's the meat of your report. All of your existing lines of credit are included in this section. If you have had any credit turned over to a collection agency, that will be included, too.

COMENITY BANK/NWYRK&CO # [REDACTED] ****			
PO BOX 182789 COLUMBUS, OH 43218-2789 (800) 889-0494			
Date Opened:	06/05/2010	Balance:	\$0
Responsibility:	Individual Account	Date Updated:	08/27/2010
Account Type:	Revolving Account	Payment Received:	\$57
Loan Type:	CHARGE ACCOUNT	Last Payment Made:	07/10/2010
		High Balance:	\$57
		Credit Limit:	\$500
		Pay Status:	Current; Paid or Paying as Agreed
		Terms:	Paid Monthly
		Date Paid:	07/10/2010

Among some basic information, each account section tells you:

- The status of the account: Current/open, closed, charged-off (sent to collections),
- The responsibility of the account: Joint or individual,
- Your account balance,
- Your most recent payment,
- Past due information, if applicable, and
- Your credit limit.

Generally, your adverse accounts and good accounts will be split:

Adverse accounts, potentially negative items

These are the accounts that hurt your credit. If you have an account in this section, you might have made late payments, the balance might be outstanding, or the account may have been sent to a collection agency. According to CreditCards.com:

“Even if you are current on your payments for a credit account, it may still be included in this section of your credit report—if you had ever missed or were late on a payment.”

The site explains that all three credit bureaus (Experian, TransUnion, and Equifax) allow you to dispute any of the accounts in this section. If the accounts are indeed adverse, they will be removed from your report after seven years. Again, if you are looking at a TransUnion report, the date of removal is included.

Accounts in good standing, satisfactory accounts

These accounts have been paid in full and on time.

Terms to know

- 1. Charge-off, Payment after charge-off:** If the status of your account is “charged-off,” this essentially means the creditor has given up on you, charging the amount off as a loss. Usually, they have sent your debt to collections. If you made a payment after a charge-off, it will not be removed from your account. As Bankrate explains:

“You did pay, and that’s great! But that doesn’t change what already happened. At one point, your debt was charged off, and your credit report is accurate in reflecting that. It’ll show the charged-off debt for seven years from the date it first went into continuous delinquency.”

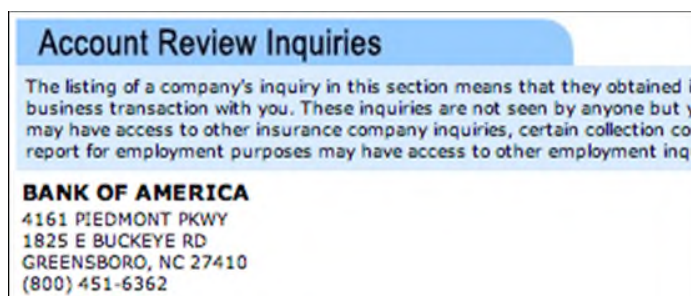
2. **Revolving account:** If your account type is revolving, it is likely a credit card. These are accounts that you do not have to pay in full every month. You have the option to revolve your credit and pay interest on the amount you revolve.
3. **Installment account:** Usually loans. These are accounts with fixed payments over a fixed time period.
4. **Open account:** These are less common to see on your credit report. They are accounts that require you to pay the balance in full each month. A utilities company, for example.
5. **Collection account:** If an account has been transferred to a third-party collection agency, that credit shows up as a collection account, even if you have settled the amount.

Credit Inquiries

This section includes individuals or businesses who have pulled and reviewed your credit report. It might include a bank at which you opened an account, for example. Or a mortgage

lender, if you are applying for a home loan. According to College Answer, there are two types of inquiries.

- **Hard Inquiries:** Made by lenders when you have applied for a loan or line of credit. If too many are made within a certain time frame, this can count against your credit score.
- **Soft Inquiries:** Made when you check out your own credit report or when a marketing agency “pre-approves” you for a line of credit.



Learn the Codes

Banking site Bankitis offers a handy breakdown of the credit report codes. Here are some different status codes you might see, and what they mean:

- **CURR ACCT:** Account is current, in good standing.
- **CUR WAS 30-2:** Account is current but was 30 days late twice.
- **PAID:** Account balance paid off, inactive.
- **CHARGOFF:** Unpaid balance charged off, credit grantor no longer seeking balance (likely has been sent to collections).
- **COLLECT:** Account is seriously past due and has been sent to collections.
- **FORECLOS:** Property was foreclosed.
- **BKLIQREQ:** Debt forgiven via Chapter 7, 11 or 13.
- **DELINQ 60:** Account 60 days past due.

Learn How Your Fico Score is Calculated

MyFICO.com says your credit score is based on five categories. Here is a breakdown.

- **Payment history** (35%): Payment history reflects whether you have paid past accounts on time. So, if you are good about making payments on time, your credit score will increase. According to the site: *“A few late payments are not an automatic ‘score-killer.’ An overall good credit picture can outweigh one or two instances of late credit card payments.”*
- **Amounts owed** (30%): Lenders want to know how much you owe. If you are close to reaching your credit limit for an account (“maxing out”), this may negatively affect your credit score, the site says.
- **Length of credit history** (15%): A longer credit history will increase your FICO score, according MyFico.com. FICO also takes into account how long you’ve been actively using those accounts.
- **Types of credit** (10%): Your score considers your mix of credit cards, installment loans, retail accounts, mortgage loans and finance company accounts. It also looks at the amount of accounts you have open. MyFico adds that closing an account does **not** make it go away; it will still show up on your report.
- **New credit** (10%): Inquiries into new lines of credit can lower your score.

Dispute Any Mistakes

If you think your report contains an error, you can file a dispute. All three of the major credit reporting agencies allow you to file disputes online. You can also mail in your dispute. The Federal Trade Commission offers sample dispute letters. According to Bankrate, TransUnion, and Equifax offer a mail-in dispute form, and Experian offers this on the last page of the consumer’s Experian credit report.

If it is your first time reading a report, or if your report includes a lot of activity—especially adverse activity—a credit report can be confusing. Do not let that deter you from keeping up with your credit. Once you learn how to read it, it is pretty simple.



The Social Security Administration (SSA) Releases Most Popular Baby Names of 2016

(Date Released: May 12, 2017)



The SSA is known for a lot of things, but one of its most popular and more pleasant features is its annual ranking of baby names, based on petitions for Social Security cards the previous year.

If there is one thing Utah, and Utah County, in particular, are known for, it is the abundance of babies buoying up the population each year, making the ranking of particular interest locally.

Though individual state rankings have not been released yet, you can check out how your super special baby names stack up on a national level with the 2016 rankings, released to media outlets Friday, May 12, 2017. Only one new name cracked the top 10 for both boys and girls this year, and that is **Elijah** – making its way to the top ten for the first time ever.

The rest have fluctuated among themselves with **Noah** taking the top boy spot for the fourth time and **Emma** marking its third consecutive year at the top of the girl list.

The 2016 rankings are as follows, starting with the most popular for each gender:

BOYS

- Noah, Liam, William, Mason, James, Benjamin, Jacob, Michael, Elijah, and Ethan.

GIRLS

- Emma, Olivia, Sophia, Isabella, Mia, Charlotte, Abigail, Emily, and Harper.

The SSA started compiling name rankings in 1997, and have popularity lists that date back to 1880, utilizing the records of each child's Social Security card petition for the most accurate rankings.

This year's stats also include some big jumps in popularity from 2015 to 2016, including the name **Kehlani** for girls (a jump of 2,487 spots total, from 3,359 to 872), and **Kylo** for boys (moving 2,368 spots from 3,269 to 901). The second biggest jumps were for the names **Royalty** (for girls), and **Creed** (for boys), with pop culture playing a big role in overall baby name popularity.

For more name rankings from 2016, to search the popularity of your name or to view how certain names have ranked through the years, head to <http://ssa.gov/oact/babynames>.



Kari Kenner

About the Author

Kari Kenner manages and creates digital features and niche content for the **Daily Herald**., a Provo, Utah, newspaper provided by the Herald Communications.



TRAVEL – SECURITY AND UPDATE

Here's Every Country That Requires a Visa for Americans

May 5, 2017



American citizens are pretty fortunate in terms of passport power, but your little blue booklet may not be quite as powerful as you think. The list of countries that require visas for Americans includes some travel hotspots, for example Australia, Brazil, Cuba, and China.

The United States has the 12th-most powerful passport in the world: 157 foreign countries allow U.S. citizens with a passport in without any visa, 43 require you to get one upon arrival, and 45 require or recommend visas ahead of arrival. This, according to PassportIndex.org (<https://www.passportindex.org/>), puts the U.S. on the third tier of passport power: alongside South Korea, Spain, Denmark, and the U.K., and just behind Sweden, Singapore, and Germany—which have the three most powerful passports.

So, where in the world will you need to have a visa to support your passport?

For short-term travel, there are a few primary ways to acquire a tourist visa. The most common route is simply getting one upon arrival by paying a fee at the airport—this occurs in most visa-requiring places that are popular for travel, and is known as “visa on arrival.” Some nations, however, may require you to secure one before your arrival by pre-registering or purchasing a visa online, usually called an Electronic Travel Authorization (eTA) – <http://www.cic.gc.ca/english/visit/eta.asp> – or eVisa (<https://www.immigration.govt.nz/about-us/our-online-systems/applying-for-a-visa-online/immigration-online/evisas>), or by applying for one in person at an embassy.

The following countries require or recommend visas are secured before your arrival. Terms and conditions vary: some may need to be acquired online. Some countries may simply recommend purchasing one beforehand in case the airport is busy—Australia, for example, offers visas upon arrival, but it is wise to get your eTA beforehand. (Starred nations offer eTA or eVisa, which means you will get electronic approval, rather than a physical visa—check their Entry Requirements page on the State Department’s website (<https://travel.state.gov/content/passports/en/country.html>) for more details.)

ADVANCE VISA REQUIRED OR STRONGLY RECOMMENDED		
Afghanistan	Eritrea	Pakistan
Algeria	Gabon*	Russia
Angola	Ghana	Saudi Arabia
Australia*	Guinea	Sierra Leone
Azerbaijan*	India*	Somalia
Benin	Iran	South Sudan
Bhutan	Iraq	Sri Lanka
Brazil	Liberia	Sudan
Burundi	Libya	Syria
Cameroon	Mali	Tajikistan*
Chad	Myanmar*	Turkmenistan
China	Nauru	Uzbekistan
Congo	Niger	Venezuela
Cuba	Nigeria	Vietnam
D.R. of Congo	North Korea	Yemen

*offers electronic visas

Here are all the countries that require visas for Americans and offer them upon arrival. Starred nations use eTA or eVisa. Check your destination’s Entry Requirements page on the State Department’s website for more details, and note that some or all visa rules may not apply if you’re entering the country via cruise ship.

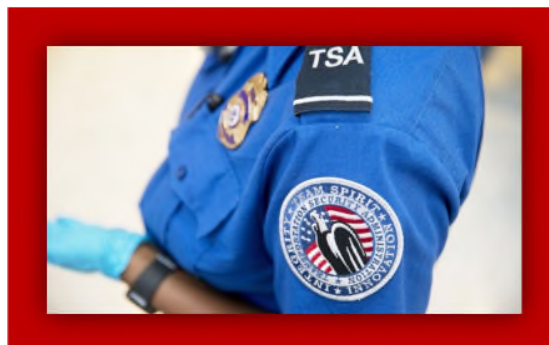
VISA ON ARRIVAL		
Bahrain	Kuwait*	Solomon Islands
Bangladesh	Laos	Suriname
Bolivia	Lebanon	Tanzania
Burkina Faso	Madagascar	Togo
Cambodia*	Malawi	Tonga
Cape Verde	Maldives	Turkey*
Comoros	Mauritania	Tuvalu
Djibouti	Mozambique	Uganda
East Timor	Nepal	U. Arab Emirates
Egypt	Oman	Zambia
Ethiopia	Papua New Guinea	Zimbabwe
Gambia	Paraguay	
Guinea-Bissau	Qatar	
Ivory Coast*	Rwanda	
Jordan	Samoa	
Kenya*	Seychelles	

*offers electronic visas



There is hope, however, that some parts of Southeast Asia could soon be visa-free (<https://skift.com/2017/05/03/southeast-asia-wants-to-copy-europes-visa-free-travel/>) for American travelers. This list will be updated if that happens.

New TSA Procedures Target Electronics, Food



May 24, 2017 – ABC News has confirmed that the Transportation Security Administration (TSA) is testing new screening procedures that require travelers to remove electronics bigger than cellphones and some food items from their bags and place them in bins to be screened separately. If passengers do not comply, their bags may be opened for manual inspection.

There is no specific threat associated with these items that requires them to be screened separately, and the change is not associated with the ban on laptops and other large electronics on flights originating from some Middle East airports; rather, the move is intended to increase efficiency. The TSA has found that everyday items can appear similar to explosives on an X-ray machine – which slows down lines because officers must manually inspect a large number of bags.

The TSA's goal is to cut down on manual bag checks and keep lines moving by screening these items separately. The **change will NOT apply to PreCheck passengers**, only to those in standard security lines.

The TSA began testing the processes a year ago at four airports, and expanded it to six more, including Los Angeles International Airport, Boston Logan International Airport, and Detroit Metropolitan Wayne County Airport.

The agency does not believe the changes will create longer lines. It said its testing indicates that the time lost from passengers' removing items from their bags is made up because fewer items confuse staffers at X-ray machines, allowing faster scanning and reducing the number of manual bag checks.

"Although passengers may experience more bag checks, we are testing quicker and more targeted procedures at these locations," the TSA said in a statement.

The TSA will also test a machine that will verify travelers' IDs rather than have an officer manually study passports and driver's licenses. Travelers will walk up to a machine and hand their ID to an officer, who will scan its bar code, and the machine will match them to airlines' passenger lists; **boarding passes will not be required**. The machines will be tested in the PreCheck lane at four airports beginning this week.

Advance Seat Selection: To Buy or Not to Buy?



Travel Q&A

Q. While booking two different flights on American *many* weeks in advance, I noticed that when I got to the phase of selecting seats that virtually all seats shown to me were the so-called "preferred" seats.

Is American purposely hiding or holding back normal economy seats to force customers to buy higher priced, but not necessarily better seats? I don't mind paying for cabin extra, but really, am I being baited and up-sold for a normal seat in row 12?

A. Yes, they *are* trying to persuade consumers to pay for the extra legroom seats. I advise people to buy the fare without choosing a seat, and then re-check frequently, either by phone or online, to see if basic economy seats become available. If none become available, they'll get one of the extra legroom seats for free or they'll be assigned a seat in basic economy eventually. As frequent fliers with status get upgraded to extra legroom seats, more basic economy seats will open, usually starting at 72 hours before flight time. Bottom line: if you can buy the regular economy airfare you will get a seat, unless you are bumped from the flight in which case you will get cash compensation for denied boarding.

TRAVEL AND LEISURE HOTEL AMENITIES

What Happens to Half-Used Hotel Room Soap, Shampoo, Etc. After You Checked Out from Your Room?



Some of you may be wondering about what happens to those complimentary items that remain either half-way consumed or left by the hotel guest unused. Well, out of curiosity, I have conducted my research on this topic, and I would like to share with you the results of same.

Unless you plan on holding up in a hotel room for an extended period, it is safe to say that complimentary bar of soap will not get used up. But where does that soap go after the hotel guests are gone?

At least some of it goes to Clean the World – <https://cleantheworld.org/> – an Orlando-based company that recycles the soap to make new soap.

The soap they use never reaches the landfill, helping the local environment, and all the new soap is distributed to areas of need. Hotels *pay* Clean the World to take their unused soap – \$0.50 per room, per month, according to *Thrillist* – <https://www.thrillist.com/travel/nation/hotel-bar-soap-clean-the-world-orlando-charity>.

They also partner with cosmetic companies like Unilever to receive their rejected soap bars. Once the old soap arrives in one of Clean the World's warehouses (which you can find in India, Las Vegas, Hong Kong, Orlando, and Montreal), the soap is melted down and reformed into new bars. These new soaps are packaged and sent off to charities (think: American Red Cross) and other NGOs (Non-Governmental Organization¹) around the world.

The work Clean the World is doing is impressive: In 2016, they made more than 7 million soaps and 400,000 hygiene kits. Of these bars of soap, 500,000 went to help those affected by Hurricane Matthew in Haiti and the Bahamas.

The company also works with half-used shampoo, body wash, and conditioner bottles. These items are closely inspected (bottles must be $\frac{3}{4}$ full), emptier bottles are recycled, and then they are included in the hygiene kits – which also include toothbrushes, toothpaste, and hand sanitizer – before being distributed to homeless shelters all over the globe.



¹ A non-governmental organization (NGO) is a not-for-profit organization that is independent from states and international governmental organizations. They are usually funded by donations, but some avoid formal funding altogether and are run primarily by volunteers. NGOs are highly diverse groups of organizations engaged in a wide range of activities, and take different forms in different parts of the world. Some may have charitable status, while others may be registered for tax exemption based on recognition of social purposes. Others may be fronts for political, religious, or other interests.

LEGAL WRITING

Seven Ways to Improve Your Legal Writing Skills

The written word is one of the most important tools of the legal profession. Words are used to advocate, inform, persuade, and instruct. Although mastering legal writing skills (see separate article posted after this article) takes time and practice, superior writing skills are essential to success. Polish your legal writing skills through the simple tips below.

1. Remember your Audience

Every word you write should be tailored to the needs of the reader. Documents that embody the same research and message may vary greatly in content and tone based on the document's intended audience. For example, a brief submitted to the court must advocate and persuade. A memorandum to a client must analyze the issues, report the state of the law and recommend an appropriate course of action. Always keep your audience in mind when crafting any piece of writing.

2. Organize your Writing

Organization is the key to successful legal writing. Create a roadmap for your writing by using visual clues to guide the reader. Introduce your subject in an introductory paragraph, use transitional phrases ("moreover," "furthermore," "however," "in addition," etc.) between each paragraph, introduce each paragraph with a topic sentence and use headings and subheadings to break up blocks of text. Limit each paragraph to one topic and sum up your message with a concluding sentence or paragraph. Organizational structure guides the reader through your text and promotes readability.

3. Ditch the Legalese

Legalese – specialized legal phrases and jargon – can make your writing abstract, stilted, and archaic. Examples of legalese include words such as aforementioned, herewith, heretofore, and wherein. Ditch unnecessary legalese and other jargon in favor of the clear and simple. To avoid legalese and promote clarity, try reading your sentence to a colleague or substituting abstract words with simple, concrete terms. For example, instead of "I am in receipt of your correspondence," "I received your letter" is clearer and more succinct.

4. Be Concise

Every word you write should contribute to your message. Omit extraneous words, shorten complex sentences, eliminate redundancies and keep it simple.

Consider the following sentence:

"Due to the fact that the defendant has not attempted to pay back the money owed to our client in the amount of \$3,000, it has become absolutely essential that we take appropriate legal action in order to obtain payment of the aforesaid amount."

A more concise version reads:

"Since the defendant has not paid the \$3,000 owed our client, we will file a lawsuit seeking reimbursement."

The latter sentence conveys the same information in 18 words versus 44. Omitting unnecessary words helps clarify the meaning of the sentence and adds impact.

5. Use Action Words

Action words make your legal prose more powerful, dynamic, and vivid. Add punch to your writing with verbs that bring your prose to life. Here are a few examples:

Weak:	The defendant was not truthful.
Better:	The defendant lied.
Weak:	The witness quickly came into the courtroom.
Better:	The witness bolted into the courtroom.
Weak:	The judge was very angry.
Better:	The judge was enraged.

6. Avoid Passive Voice

Passive voice disguises responsibility for an act by eliminating the subject of the verb. Active voice, on the other hand, tells the reader who is doing the acting and clarifies your message. For example, instead of “the filing deadline was missed,” say “plaintiff’s counsel missed the filing deadline.” Instead of “a crime was committed,” say “the defendant committed the crime.”

7. Edit Ruthlessly

Edit your writing ruthlessly, omitting unnecessary words, and rewriting for clarity. Careful proofreading is particularly important in legal writing. Spelling, punctuation, or grammatical errors in a document submitted to the court, opposing counsel, or a client can undermine your credibility as a legal professional.



CALIFORNIA BILLS

California Bills Target Private Business to Help Immigrants

May 27, 2017



Background

In this March 17, 2017, file photo, Assemblyman David Chiu, D-San Francisco, Chair of the Assembly Committee on Housing and Community Development, right, speaks in Los Angeles. California Democrats are expanding their efforts to resist President Donald Trump’s crackdown on illegal immigration with bills aimed at limiting how much private business people can cooperate with federal immigration authorities. A bill that would bar landlords from disclosing tenants’ immigration status passed the Assembly on Monday, May 22, 2017. A

measure prohibiting employers from letting immigration agents into their worksites without a warrant cleared a key committee Friday, May 26, 2017.

California Democrats are expanding their efforts to resist President Donald Trump's crackdown on immigrants in the country illegally with bills aimed at limiting how much private businesses can cooperate with federal immigration authorities.

Democrats control all levels of state government, and leaders have vowed to resist Trump administration policies at every turn. Immigration is among their key issues, but most legislation so far has been aimed at limiting what police can do to help immigration authorities and providing additional state services and support to immigrants in the country illegally.

Now, two bills that advanced in the Assembly in the past week are taking aim at private businesses.

A measure that would bar landlords from disclosing tenants' immigration status or reporting them to immigration officials passed the chamber. A bill prohibiting public and private employers from letting immigration agents come into their worksites or view their employee files cleared a committee.

Both bills contain exceptions if employers or landlords are complying with a warrant or subpoena.

Ann Morse, who tracks immigration bills for the National Conference of State Legislatures, said the California measures are the only ones she knows of that aim to limit landlords and private businesses' cooperation and communication with immigration enforcement.

Both bills are sponsored by Democratic Assemblyman David Chiu of San Francisco. He said they are necessary to protect against deportation of immigrants who have not committed crimes since entering the country.

Assemblyman Kevin Kiley, who opposes the measures, said he thinks they could promote fear in immigrant communities, and existing laws already protect tenants. He said the proposals, along with many of the other immigration bills introduced this session, are designed more to *make* a political statement than to *enact* good policy.

"If you have a private citizen who provides certain information at the behest of a federal authority, they might end up facing (consequences) just for complying with the request," the Sacramento-area Republican said. "Measures like that do more harm than good."

Jith Meganathan, a policy advocate for the Western Center on Law and Poverty, said that following Trump's victory last fall, organizations that provide legal assistance to low-income Californians began receiving more reports of landlords threatening tenants over their immigration status. Although some of what Chiu's landlord-tenant bill forbids may already be illegal under the state's anti-discrimination laws, he said the measure, AB291, will provide important legal clarity.

At a hearing on the bill in early May, Oakland resident Maria Estrada told lawmakers her landlord in 2015 threatened to report her family when he learned her daughter did not have legal permission to live in the country.

Estrada said she had complained to her landlord about a broken refrigerator, a clogged toilet and an unsecure back door, among other problems in her studio apartment. She told lawmakers he threatened to report her daughter to federal immigration authorities if they continued asking him to make repairs.

"We could not sleep because of the stress of our family breaking up," Estrada said. "No one should have to experience the fear, the pain and harassment which my family has suffered just because they are undocumented."

Advocates of Chiu's other bill, AB450, said they have not seen workplace raids in California since Trump took office. But Steve Smith of the California Labor Federation — an organization supporting the bill — said the new

administration has emboldened immigration enforcement agents, and there is concern they will begin targeting businesses.

Marti Fisher, a policy advocate at the California Chamber of Commerce, said the measure infringes on business owners' rights.

"It penalizes an employer for choosing to cooperate with federal immigration enforcement authorities, thereby denying the employer the right to determine the best course of action for its business," she wrote in a statement explaining the chamber's opposition to the bill.



ASBESTOS LITIGATION

The following article is being published with written permission from Matthew T. Giardina, Esq., an associate in the Providence, Rhode Island office of Manion Gaynor & Manning LLP, and a member of the firm's Complex Litigation Practice Group. He focuses his practice in the areas of products liability defense, mass torts, and other complex tort litigation as well as employment law and corresponding litigation. Matt's work experience includes representing corporate clients in all phases of civil litigation. He routinely defends clients against claims arising in negligence, breach of contract, breach of warranty, wrongful death, and failure to warn. Additionally, Matt handles a variety of employment-related discrimination cases and premise liability actions.

S.D.N.Y. Tells Plaintiffs: "Stop! You Cannot Sue, You Changed Your Story"



On Friday, April 28, 2017, the United States District Court for the Southern District of New York dismissed, in its entirety, John and Michele Clark's asbestos personal injury action based on the doctrine of judicial estoppel. In short, the Court ruled that the Plaintiffs' lawsuit could not proceed without damaging the integrity and proper functioning of the judicial system. The reason: Plaintiffs did not disclose their personal injury claims before receiving their Chapter 13 Bankruptcy discharge.

The background of Plaintiffs' personal injury lawsuit is entwined with two other actions. First, Plaintiffs filed for a Chapter 13 bankruptcy petition in Connecticut in February 2010. A Bankruptcy Plan was confirmed approximately five months later, in July 2010. In March 2016, Plaintiffs declared that they had made all their payments as prescribed by their bankruptcy plan and requested that the bankruptcy court issue an order discharging their debts. The bankruptcy court entered such an order in August 2016.

Second, in August 2015—a year before the Chapter 13 petition was discharged—Plaintiffs filed an asbestos-related personal injury action in Illinois state court. The Illinois suit came about one month after Mr. Clark was diagnosed with mesothelioma. Plaintiffs alleged that Mr. Clark's illness was caused by exposure to asbestos during his service in the United States Air Force, as well as his employment with an aircraft manufacturer. Plaintiffs, however, did not inform the bankruptcy court of their asbestos claims, as bankruptcy law requires. Indeed, in a Chapter 13 bankruptcy, petitioners have an ongoing obligation to disclose any asset that accrues

between the initiation and closing of their bankruptcy case as “[e]very conceivable interest of the debtor, future, nonpossessory, contingent, speculative, and derivative, is within the reach of [the bankruptcy estate].” (*Chartschlaa v. Nationwide Mut. Ins. Co.* (2d Cir. 2008) 538 F.3d 116, 122.) Thus, by not amending their Chapter 13 schedules, Plaintiffs, in effect, were concealing an asset that rightfully belonged in their bankruptcy trustee’s care. Accordingly, after a defendant informed Plaintiffs of its intention to file a motion to dismiss based on judicial estoppel owing to their failure to disclose the existence of their Illinois action, Plaintiffs’ voluntarily dismissed the Illinois lawsuit.

Then, in July 2016—again, while Plaintiffs’ bankruptcy case was still open—Plaintiffs filed a second asbestos personal injury suit raising the same claims as those raised in Illinois, but this time in New York state court. Shortly thereafter, the defendants in the New York action removed the case to the Southern District and Plaintiffs’ bankruptcy case closed, without Plaintiffs ever amending their Chapter 13 schedules. The New York defendants then promptly filed their motion to dismiss based on judicial estoppel.

The defendants argued that Plaintiffs’ claims had to be judicially estopped, as a matter of law, because Plaintiffs took inconsistent positions before the Bankruptcy Court and the Southern District. On the one hand, Plaintiffs, by not fulfilling their statutory obligation to amend their schedule of assets in the bankruptcy case, declared that they had no foreseeable assets owing to them. On the other hand, Plaintiffs claimed in their New York action that they were entitled to monetary damages as a result of Mr. Clark’s asbestos exposure. In granting the defendants’ motion, the Southern District noted that “judicial estoppel is a harsh rule.” (*Clark, et al. v. Advanced Composites Group, et al.* (S.D.N.Y., Apr. 28, 2017), No. C.A. 16 Civ. 6422 (GBD), *10. But, its application was appropriate and essential. The Court explained that:

Plaintiffs’ duty to disclose assets did not terminate upon confirmation of their bankruptcy plan or when payments were completed. Rather, the disclosure duty was a ‘continuing one’ which continued until the bankruptcy case was closed.

Id. at *8.

To allow Plaintiffs to continue with their personal injury action after failing to disclose potential assets to the bankruptcy court would be intolerable as they unfairly would have benefitted from a windfall. For example, “had Plaintiffs’ cause of action been disclosed during the bankruptcy proceeding, their creditors might have pursued a higher interest rate, or taken a different view of the appropriateness and viability of the [bankruptcy plan].” (*Id.* at *9.) Moreover, because the integrity of the bankruptcy system predominately relies on debtors’ “full and honest disclosures,” Plaintiffs were not permitted to change their story.



LEGAL CAREERS

Top Ten Legal Skills

Competitive and Attractive Legal Skills for Job Seekers



While legal positions vary greatly in scope and responsibility, there are certain core legal skills that are required in most legal positions. If you are considering a career in the law, it is wise to polish these top ten legal skills to excel in today's competitive legal market.

1. Oral Communication

Language is one of the most fundamental tools of the legal professional. Legal professionals must:

- Convey information in a clear, concise, and logical manner.
- Communicate persuasively.
- Can advocate a position or a cause.
- Master legal terminology.
- Develop keen listening skills.

2. Written Communication

From writing simple correspondence to drafting complex legal documents, writing is an integral function of nearly every legal position. Legal professionals must:

- Master the stylistic and mechanical aspects of writing.
- Master the fundamentals of English grammar.
- Learn how to write organized, concise, and persuasive prose.
- Draft effective legal documents such as motions, briefs, memorandums, resolutions, and legal agreements.

3. Client Service

In the client-focused legal industry, serving the client honestly, capably, and responsibly is crucial to success. Legal professionals must master:

- Rainmaking and client development skills.
- Customer service skills.
- Client communication skills.

4. Analytical and Logical Reasoning

Legal professionals must learn to review and assimilate large volumes of complex information in an efficient and effective manner. Legal analytical and logical reasoning skills include:

- Reviewing complex written documents, drawing inferences, and making connections among legal authorities.
- Developing logical thinking, organization, and problem-solving abilities.
- Structuring and evaluating arguments.
- Using inductive and deductive reasoning to draw inferences and reach conclusions.

5. Legal Research

Researching legal concepts, case law, judicial opinions, statutes, regulations, and other information is an important legal skill. Legal professionals must:

- Master legal research techniques.
- Learn how to locate and synthesize legal authority.
- Master the art of statutory interpretation.
- Learn proper legal citation.
- Master legal research software applications and Internet research.

6. Technology

Technology is changing the legal landscape and is an integral part of every legal function. To remain effective in their jobs, legal professionals must:

- Master a variety of word processing, presentation, time and billing, and practice-related software applications.
- Master communications technology, including email, voice messaging systems, videoconferencing, and related technology.
- Become familiar with electronic discovery, computerized litigation support, and document management software.
- Become proficient with legal research software and Internet research.
- Develop the tech know-how to make wise technology decisions.

7. Knowledge of Substantive Law and Legal Procedure

All legal professionals, even those at the bottom of the legal career food chain, must have a basic knowledge of substantive law and legal procedure. Legal professionals must have a general knowledge of:

- Local, state, and federal court systems.
- Relevant filing deadlines.
- Fundamental principles of law in the practice areas in which they work.
- Relevant legal terminology.

8. Time Management

In a profession based on a business model ([the billable hour](#)) that ties productivity to financial gain, legal professionals are under constant pressure to bill time and manage large workloads. Therefore, legal professionals must develop:

- Superior multi-tasking skills.
- A strong work ethic.
- The ability to juggle competing priorities.
- The ability to meet tight deadlines.
- Calendar and time management skills.

9. Organization

To manage large volumes of data and documents, legal professionals must develop top-notch organizational skills, including:

- The ability to sort, order, and manage large volumes of exhibits, documents, files, evidence, data, and other information.
- The ability to identify objectives, catalogue data, and create an effective organization structure from massive amounts of unrelated information.
- The ability to use technology applications that assist in managing case-related data.

10. Teamwork

Legal professionals do not work in a vacuum. Even solo practitioners must **rely on secretaries and support staff** [emphasis added] and team up with co-counsel, experts, and vendors to deliver legal services. Moreover, since the needs of the client may transcend the skills of one attorney, one paralegal, or one practice group, teamwork is essential to individual and organizational success. Teamwork skills include:

- Collaborating with others to reach a common goal.
- Coordinating and sharing information and knowledge.
- Cultivating relationships with colleagues, staff, clients, experts, vendors, and others.
- Attending and participating in team events, meetings, and conferences.

Develop these skills, and you'll be on your way to success in the legal profession!



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

How To Juggle Five Or More Attorneys At The Same Time Without Dropping One On Your Head

PART 1 IN A 5 PART SERIES

By Carol E. Romo

The role of the Legal Secretary has changed greatly over the past two decades. Many law firms have gone so far as to change our title to *Client Services Secretary* or something along those lines. The reason for this comes from the advancement of technology. And most of us who have been Legal Secretaries for a while, know this all too well.

Today most attorneys in the private law firm are computer savvy. They either grew up and went to school with a keyboard at their fingertips, or they learned how to use a computer effectively to keep up with the attorneys coming up the pipeline. I recall my first job in a professional office working as an Executive Secretary to the CEO of a national financial institution. He called me into his office and asked me to show him how to send an email. Part of the procedure involved pressing the F12 key. When I advised him to do that, he immediately plucked the F key followed by the number 1 key and then the number 2 key. (We've come a long way in a short period of time.)

Today, dicta-phones and deciphering an attorney's handwriting on multiple pages of legal yellow notepads are definitely things of the past. We all know that email has replaced facsimilies and stock letterhead, and we hardly ever run out of firm printed envelopes any more. And, while being able to scan and save documents was supposed to save paper, it worked out to be the opposite because now everyone prints out their own hard copies of everything that used to be found on a bookshelf in the law library. It was also not so long ago, that everything the court had on file, was also filed in the records department of every law firm involved in the matter. Now all filed paper is stored in the firm's computer archives. Gone are the days of pleading and discovery indices. Now it's all about naming the documents in a standardized style when saving them to the firm's data base.

So, thanks to all of the advancement in the technical business world, we Legal Secretaries find ourselves being assigned to support additional attorneys as our fellow Legal Secretaries leave our law firms. Look around most any law firm that has yet to undergo office renovation, and you will see empty workstations that used to house Legal Secretaries who were located within earshot of the attorney they supported. Today, secretaries are assigned to support five and six attorneys simultaneously and they are never all within eyesight. That's because the work of the Legal Secretary has changed. With attorneys typing their own pleadings and discovery, many even e-filing or e-serving the documents themselves (why? Because they have until midnight to do so . . .) that leaves more time for their Legal Secretaries to handle more administrative tasks like expense reimbursements and inputting billing time. In fact, Associates prefer to be self-supportive because they don't see any benefit from having a secretary do what they can do themselves. Still, we Legal Secretaries all agree that the best thing the Associate can do is to write the text and allow us to do the formatting.

So, I have come up with some tips on mastering the new challenge of supporting five or more attorneys at a time in a way that is useful to the attorney and keeps our role fulfilling. Since communication is key to anything and because most of our attorneys are not within earshot or eyesight of us anymore, I am going to start this five part series with Emails.

NUMBER 1 - DROWNING IN EMAIL ONE LINERS

A very distinct problem we have when we are not in earshot of those we support is the huge increase in "one-liner" small email communications. What used to be communicated in passing, like "Are you going to be in the office tomorrow?" or "Did Frank see you? He was looking for you." etc., becomes an email volleyball match that takes a great deal of your time opening, reading and responding to. Any every time your task at hand is

interrupted by these little mosquito-like emails, **it takes several minutes to get back to the place you were** before having had to reply to the constant flow of emails from the attorneys you support. I used to work with a Partner that would write me an email to get him something even though I was just outside his door and no one else was in the vicinity. Yes, it's true. Email can actually cost you hundreds of hours of unnecessary work where a telephone or personal communication could easily be had for less.

So, the best way to thwart these email oneliners is by picking up the phone and responding directly to the email inquiry. Trust me, this will not only save you time otherwise spent playing email volleyball but it will also give your attorneys a little training by example. First, put all of your attorneys extensions on speed-dial at your phone. If you have a question for your attorney, pick up the phone and press his/her extension. Before you reply by phone to an attorney's email, think about questions you may have concerning their initial email. This too (meaning questions you may have) is good reason for using the phone instead of playing email volleyball all day.

NUMBER 2 - PUTTING YOUR HANDS ON THAT EMAIL NOW!

How often do you hear "it was in that email I sent you"? I always want to reply to that remark with "Well, it's a good thing I only get emails from you." Of course, I never say that out loud, but the bubble looms large over my head if this were a cartoon. One of the best ways to keep on top of your incoming email when you support five or more attorneys is to create a folder with each of those attorneys' names in your Outlook Navigation Pane. (Example 1 below.) Then, as you get emails from your assigned attorneys you can save them under their named folders and answer them if not urgent, when it is more convenient, especially if you are in the middle of something with a deadline looming. Using this practice also allows you to find the email that attorney is referring to, more readily in the future, with or without Outlook's search feature.

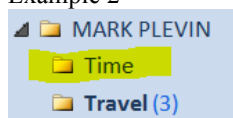
Sometimes, I use the Rules feature in Outlook to keep my inbox free of clutter. For example, I have an attorney who sends me his billing time by email every day. He always uses the words "Billing Time" in the subject line. So I created a rule that automatically puts incoming emails from that attorney, with the words "Billing Time" in the subject line, in a sub-folder I created called "Time". (See Example 2 below.) Later, when I have the time, I go to that sub-folder and input the billing time. I also leave all his emailed billing time there in case he ever questions what he wrote, etc. So, this takes some of the clutter out of my inbox and makes it easy for me to put my finger on this particular subject.

Well, that's all for this first part of "How to Juggle Five or More Attorneys Without Dropping One On Your Head" If you have any comments or ideas relating to the specific items listed above, please send them to me at Carolromol@gmail.com and I will publish them at the end of the part this five part series. Hope some of you will find something useful in this series.

Example 1



Example 2



**SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION
CHAPTER ACHIEVEMENTS**

(Please submit this form each month.)

Month: June 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

San Francisco Legal Professionals Association

June 27, 2017 Brown Bag Presentation



***From Office Politics to Connection:
Transforming Negative Relations in the Workplace***
Presented by Ana Fatima Costa

In business, relationship conflicts are a primary driver of inefficiency. How people feel at work and their ability to self-regulate their emotions profoundly influence how they perform. Social-emotional intelligence is the key to diminishing disruptions from conflicts and emotional reactions. This skill can be learned and has been proven both scientifically and practically to:

- reduce turnover
- increase productivity
- resolve problems creatively
- create a more cooperative work environment

In this interactive workshop, experience The Connection Practice®, a scientifically-based, social-emotional skill that provides proven efficient, powerful tools to give you the clarity and confidence you need to access your best intelligence in order to make better choices.

Tuesday, June 27, 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, June 23, 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:



Ana Fatima Costa's 35-year career as a freelance court and deposition reporter, office manager and sales executive provided her a unique perspective on human conflict. As a certified Connection Practice Coach and Trainer, Ana offers transformative tools to assist clients in developing powerful strategies to achieve win-win solutions. To schedule a session, visit <http://www.anafatimacosta.com/coaching>.

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.



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



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.



California Certified Legal Secretary
A Program of LSI®



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!

LSI MEMBERS-ONLY PRICE\$273
Nonmembers Price.....\$390

Price includes shipping. Add applicable sales tax.
This title is updated annually for subscribers by replacement pages.

LAW OFFICE PROCEDURES MANUAL

...THE IDEAL TRAINING MANUAL FOR NEW STAFF!

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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

2015-2016 MEMBERSHIP APPLICATION AND ANNUAL RENEWAL FORM

August 1, 2015 – July 31, 2016

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

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

Name: _____ ☐ CCLS ☐ PLS ☐ CLA ☐ Paralegal

E-Mail Address: _____

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

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

Firm/Business Name: _____

Address: _____

Local Association or Member at Large: _____

Phone: _____ *I prefer communication via USPS* ☐

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

PER LSI STANDING RULES, CHECKS ISSUED TO LSI WHICH ARE NON-NEGOTIABLE BECAUSE OF INSUFFICIENT FUNDS OR OTHER REASON SHALL BE REPLACED IMMEDIATELY BY CASH, A CERTIFIED CHECK, OR MONEY ORDER FOR THE AMOUNT OF THE ORIGINAL CHECK, \$25 PENALTY, AND THE ACTUAL COST CHARGED TO LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL CHECK.

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

YEARS OF LEGAL EXPERIENCE: _____

SPECIALTY: _____

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

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

A Professional Association for Legal Secretaries and Other Law Office Professionals

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

Established 1936

Member Legal Secretaries, Incorporated,

A California Nonprofit Corporation

Established 1934

SFLPA Objectives

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

Membership Information

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

Membership Eligibility

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

Membership Benefits

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



San Francisco Legal Professionals Association (SFLPA)

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

APPLICATION FOR ACTIVE MEMBERSHIP

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

PERSONAL:	BUSINESS:
NAME: _____	Your Title: _____
Hm Address: _____	Employer: _____
_____	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

June 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.

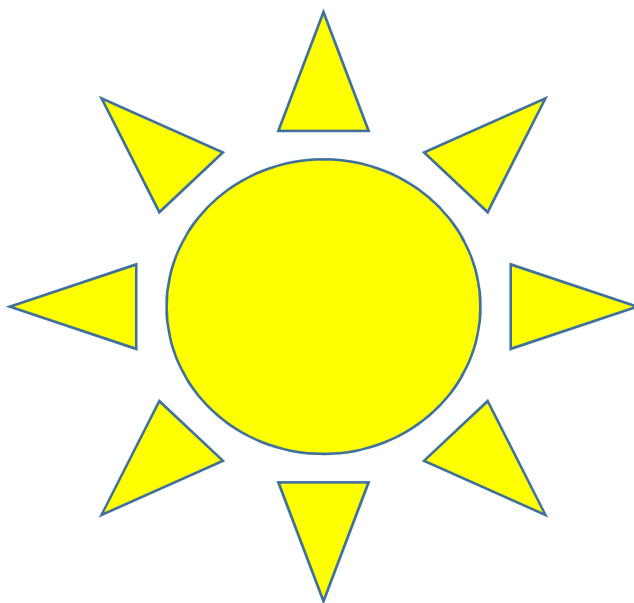
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<p>FINANCIAL PROVIDERS</p>	
<p>CAPITAL INVESTMENT ADVISERS Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 www.ciadvisers.com Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>	<p>LEGACY WEALTH MANAGEMENT Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz Offering discounted John Hancock Long Term Care Insurance and Life Insurance, Annuities, Retirement, Investment and Estate Planning, Mutual Funds, and 401K</p>
<p>DAVID WHITE & ASSOCIATES Wealth Accumulation and Preservation 3150 Crow Canyon Place, Suite 2000 San Ramon, CA 94583 (800) 548-2671 Contact: Ryan Gonzales (ext. 2682), rgonzales@dwassociates.com, or Matt Kay (ext. 2628), mkay@dwassociates.com Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance</p>	<p>ATHLETES BUSINESS CONSULTANTS Jory Wolf, President/Founder 350 10TH Avenue, Suite 1000 San Diego, CA 92101 Office: (858)886-9842 Cell: (510)919-9062 jorv@athletesbiz.com California Insurance License: 0E88330 10% discount on Long Term Care, call for information on life, long term, and disability insurance, as well as commercial and residential lending</p>
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QUESTIONS AND CONCERNS CONTACT:

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

Revised 6/12/2014

Editor's Message



Hello everyone,

We hope you are all enjoying this wonderful Bay Area weather! The Warriors won the NBA Championship and Summer season is in. I'm sure most of you are getting ready for their vacations and family gatherings. As a reminder, please be sure to make some time for our continued education programs and of course some fun activities for everyone to enjoy.

The SF Aids walk is scheduled for Saturday, July 19, 2017 at Golden Gate Park. Everyone is welcome and there is no fee to participate or mandatory monetary amount set to participate. Please feel free to contact us if you'd like to participate.

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.

Thank you all who attended conference and thank you to our wonderful delegates who submitted articles for the Hearsay. We truly appreciate all the work everyone has done to make SFLPA a wonderful organization to be a part of. I am truly proud of team SFLPA!!!

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