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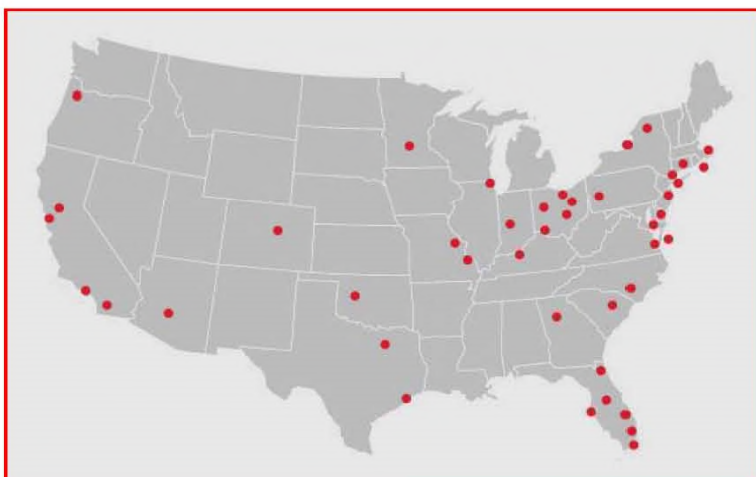
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The Bar Association of San Francisco



May 2017 – President's Message

By: Larry McGrew



May 2017 – President's Message

Greetings SFLPA Members & Friends,

As we close the chapter on a very historic year, we have already begun planning our events and programs for our 81st fiscal year. Before we take a glimpse into the future, I would like to reflect on the past. More specifically.... our year-end celebration gala.

First, I would like to thank our members, their families and our friends from the other neighboring associations for all your support. Without you, none of this would be possible. It was also very special to celebrate this milestone occasion with family. I am grateful to have been a part of this historic event for the SFLPA.

There were times when I did not think that this celebration gala would actually happen. Amazingly, our team rallied and not only found an affordable location, but handled every detail which made this night very special. This goes to show what can be done when you work together as a team. The event turned out to be fantastic! Everyone had a good time and I could not be more proud to be the President of the SFLPA.

When preparing for the program, I learned a great deal of how much our San Francisco Chapter played a very important part of the founding process of the California Federation of Legal Secretaries which would become Legal Secretaries, Incorporated. We were fortunate to have some very special guests in attendance who contributed to the success of our special event.

Our program took us on a journey through time as we 'Honored the Past, Celebrated the Present and Embraced the Future.' We explored the early years of the SFLPA and LSI highlighting the years 1929 – 1949. Our guest speakers were past presidents of the SFLPA, two of whom also served as past presidents of LSI. A very special thanks to:

- Faye Lee Bresler, Esq., PLS, CCLS, JD; Past President 1979; SFLPA Life Member
- Yvonne Waldron-Robinson, CCLS; Past President 1984-86; Past LSI President 2000-02 & Life Member of LSI
- Mary Beaudrow, CCLS; Past President 1995-97; 2005-07 & 2014-16; current LSI Executive Advisor and Treasurer of the National Docketing Association
- Christine Flores, CBA; Past President 1993-95; 2000-02 & 2010-15; current SFLPA Governor 2016-18

I would also like to thank a few other participants: LSI Parliamentarian Kristi L. Edwards, CCLS of Marin County LPA for providing us with a very special Installation ceremony for our newly elected officers; Rod Cardinale, Jr. of Santa Clara County LPA and the first male Executive

Committee member and the current LSI Treasurer; and last but not least, LSI President Jennifer L. Page, CCLS of Marin County LPA for closing the presentation and for providing a very special toast to SFLPA's future.

I also would like to acknowledge Terralyn Graff, current Programs Chair and recipient of the 2017 President's award for her outstanding work on the success of the event. Ryan Halog also secured our event sponsor. A special thanks goes to Eldorado Casino Resort in Reno for their continued support as our event sponsor.

There were many others who played a role in the success of the event. I thank you all for your contributions. Drawings were held for those in attendance. The prizes ranged from \$80 cash, a \$45 Gift Certificate for Membership Renewal and a scrip ticket for the 2017 Annual LSI Conference valued at \$150.

Thanks to those who donated items for our Silent Auction. Our gratitude to DJ Devin Pennix for giving us a discounted rate on his services. We appreciate his generosity and we would love to invite him back for future events. All of our guests received a commemorative pin for our 80th Anniversary. The event overall was very successful and many of the attendees expressed their desire for having a year-end celebration tied to our Officer Installation again in the future. This is something we will surely consider.

The Irish Cultural Center were fantastic hosts. Everyone was very accommodating. The food was fantastic. There was plenty of it. They even provided to go containers so that people could take whatever they wanted home with them. Photos of the event were posted on Facebook. We are in the process of collecting photos as we plan to create an 80th Anniversary Gala Scrapbook for those that would like to have a keepsake of the history of the SFLPA.

And now, a new chapter has begun. We've had our first Board meeting with 4 new Board members and we are developing our event calendar for the 2017-18 year. Our theme is "Creating Connections – Building Bridges . . . Together!" Our plan is to reach out to 100 law firms in the City to seek to build partnerships in education. We are also planning to get more involved by participating in community events as well as volunteering for charitable organizations.

We plan to provide a balance of education, personal development and networking opportunities for our members. Also keep in mind, there are other opportunities to learn through LSI. They host Legal Specialization Sections Workshops, online training, an online study group for becoming a California Certified Legal Secretary, as well as other online training courses. In addition, there are four quarterly conferences that provide workshops covering the six sections: Civil Litigation, Criminal/Family Law, Federal Law, Law Office Administration, Probate/Estate Planning, and Transactional Law. All courses provide 1 hour of MCLE/CCLS accreditation.

There are plenty of educational opportunities available. So please stay tuned as we provide those announcements as soon as the event plans are finalized. In the meantime, we have the following events on our calendar:

- LSI Annual Conference, May 19-21, 2017 in Modesto

- Brown Bag Presentation, May 23, 2017 - Topic: "Thought about Law School?" Presented by Lisa Agueda of Pranger Law Group

Also, please save the date for the following events into your Outlook/calendar:

- General Membership Meetings – Quarterly on the 3rd Tuesday on the following dates: July 18, 2017, October 17, 2017, January 16, 2018 and March 20, 2018.
- Brown Bag Presentations – Monthly on the 4 Tuesday of the month
- 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 Knotts Berry Farm in Buena Park
 - 84th Annual Conference – May 17-20, 2018 at the Beverly Garland Hotel in North Hollywood

Lastly, please visit the LSI website for more details. From the home page click on 'Upcoming Conferences.'

We are excited about the 2017-18 New Year and we hope that you will continue your membership. Keep in mind, the last day to renew and avoid a \$5 late charge is June 1, 2017. We hope you have a wonderful Memorial Day holiday weekend.

Respectfully,
Larry McGrew
President

Vice President's Message

By: Carol Romo

From your VEEP . . .

I would like to thank those who came to our election meeting on April 21, 2017 to vote on your elected officers for 2017-18. It is my hope that we will have more candidates each year and maintain a constant stream of new voices within our leadership group.

As Vice President (or “VEEP” as I like to say), I look forward to assisting the President of our Association in the best way possible. This includes representing our members at each of the Board Meetings by bringing your ideas and suggestions to the table. It is important that we hear what our general members have to say and then actually put those ideas and suggestions to work in order to keep our Association moving forward and growing stronger.

As the Membership Chairperson, I will personally be reaching out to each of our “Active members” (as defined in our Association Bylaws), for a one-on-one chat about any thoughts you might have that would help improve our Association. I’m talking educational topics, social events, and special guest speakers that you think would help promote our Association and interest other legal professionals like yourselves to attend.

We are fortunate to be in one of the most legally affluent cities in the world. San Francisco’s Financial District has some of the most prestigious and reputable law offices in the nation. As such, I will be drawing from that pool to help improve our membership and make our presence known again in these places. As I said when I campaigned for VEEP, it is my goal to take full advantage of this concentration of legal professionals and bring in at least one new legal secretary, paralegal or legal clerk from each of these law firms. But I will need our current roll of active members to start off this zealous membership drive and I promise that we will have fun doing this at the same time.

With that thought, I would like to present Lillian Wong and Malou Sana who I recruited to become members of the Membership Committee. I am so pleased and fortunate to have these two enthusiastic active members who will devote some of their valuable time for the good of the Association. Thank you so much Lillian and Malou.

I would like to close by saying thank you all for your support - past, present and future. I can hardly wait to get your input and meet the challenge that comes with what I have outlined here.

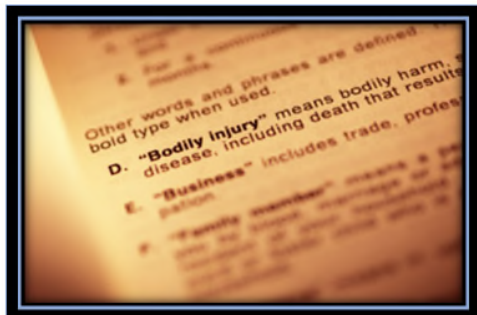
With enthusiasm and your best interest in mind,

Your VEEP, Carol Romo

P.S. I am authoring a series of articles over the next five Hearsay publications called “How To Juggle Six Or More Attorneys Without Dropping One On Your Head.” At the end of each article in the series, I would like to publish your ideas, suggestions or comments with respect to each particular article in the series. So, please stay tuned for some pointers on this all-too-real topic and possibly share your own tips and pointers with our Hearsay readers.

May 2017 CIVIL LITIGATION

Are Insurance Agreements Discoverable?



The existence of insurance is often key to a lawsuit and one of the first orders of business in discovery. There are statutory provisions allowing for discovery of the existence and contents of insurance agreements—as well as limits on it.

Here are the parameters of insurance discoverability:

- **Discovery is permitted under Code of Civ. Proc., § 2017.210.** California discovery law expressly provides for discovery about insurance agreements under which a carrier may be liable to satisfy all or part of a potential judgment or to indemnify or reimburse payments made to satisfy the judgment. (Code Civ. Proc., § 2017.210.) The statute also provides for discovery of whether coverage of the claim involved in the action is disputed. (Code Civ. Proc., § 2017.210.) But, because the existence of liability insurance may not be relevant to the underlying subject matter of the action, there is cautionary language in Code of Civ. Proc., § 2017.210, stating that information about insurance is not admissible in evidence at trial by reason of disclosure.
- **Reinsurance agreements are not automatically discoverable under Code Civ. Proc., § 2017.210.** Section 2017.210 does not authorize the discovery of information related to the financial condition of a defendant's nonparty reinsurer, nor does it authorize the discovery of an insurer's reinsurance agreements. Instead, the discoverability of reinsurance information rests on the general relevancy standards of Code Civ. Proc., § 2017.210. (*Catholic Mut. Relief Soc'y v. Superior Court* (2007) 42 Cal.4th 358, 363.)
- **Insurance applications are not discoverable.** Under Code Civ. Proc., §§ 2017.010 and 2031.010, a party can obtain relevant insurance policies in a personal injury action. (*Irvington-Moore, Inc. v. Superior Court* (1993) 14 Cal.App.4th 733.) However, the insurance *application* is not discoverable unless the application is incorporated into the policy.
- **Existence of a policy is not privileged.** There is no privilege under Civ. Code, § 47(b), regarding the existence of an insurance policy. That is, a party may not knowingly conceal the existence of an insurance policy and claim that the existence of such a policy is privileged under Civ. Code, § 47(b). (Civ. Code, § 47(b)(3).)
- **Generally there is no discovery of policy limits before suit is filed.** A party does not have the right to discover the insured's insurance policy limits before an action is filed, unless the requirements of Code Civ. Proc., §§ 2035.010-2035.060, governing discovery before commencement of an action, are met. (*Griffith v. State Farm Mut. Auto. Ins. Co.* (1991) 230 Cal.App.3d 59, 69.) The filing of a petition to perpetuate testimony or the filing of a lawsuit ensures that a serious claim is being asserted, and that the privacy interests of insureds are protected from unwarranted intrusion by third parties.

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What Does It Mean to “Meet and Confer” on a Discovery Dispute?



Before moving to compel discovery responses, California law requires that the parties “meet and confer.” But what do you actually have to do to meet that requirement?

California Code of Civil Procedure, § 2016.040, requires that parties meet and confer in a reasonable and good faith attempt at an informal resolution of each issue presented by the [discovery] motion.

What does that really mean? You know that your meet and confer efforts cannot be illusory; you need to make a legitimate good faith attempt to resolve the dispute. But what actually constitutes a good faith meet-and-confer effort depends on a variety of factors, including the complexity of the case, the history of the litigation, and the type and scope of discovery requested.

Not surprisingly, the more complex the issues, the more time and effort you will need to spend trying to resolve the dispute. The meet-and-confer effort should reflect the same level of persuasive effort as the discovery motion itself.

Here are some rules of thumb:

- The meet-and-confer discussions should have the same level of professionalism as papers filed with the court and argument occurring in the court’s presence.
- Even in a relatively uncomplicated case, merely exchanging a single letter or email is not enough to satisfy the meet-and-confer requirement; at a minimum, meet or talk by telephone to try to work out the issues and then follow up with a letter setting out your follow-up efforts.
- The meet-and-confer efforts should occur with sufficient time before the deadline to bring the motion so that your deadline is not so short as to seem unreasonable.
- Avoid appearing to make ultimatums that are not good faith efforts to resolve the disputes.

Take your responsibility to meet and confer very seriously because there is a big stick associated with it: *the court must impose monetary sanctions on any party or attorney who fails to meet and confer in good faith, even if the party subject to the sanction prevails on the discovery motion.* (Code Civ. Proc., § 2023.020.)

In addition, if the section governing a particular motion requires the filing of a declaration showing a reasonable and good faith attempt to resolve the issues informally, the failure to meet and confer constitutes a misuse of the discovery process, which subjects the offending party or attorney not only to monetary sanctions, but also to issue, evidence, contempt, or terminating sanctions. (See Code Civ. Proc., §§ 2023.010(i), 2023.030(a)-(e).)

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What's NOT Protected by Attorney-Client Privilege?



The attorney-client privilege (Evid. Code, §§ 950-962) protects a client from disclosure of confidential communications between attorney and client. But not every communication between attorney and client is protected. Do you know what is not covered?

The following items of information are outside the scope of the attorney-client privilege, and thus discoverable:

- **The existence of the attorney-client relationship.** (*In re Grand Jury Subpoena (Roe v. U.S.)* (2d Cir. 1986) 781 F.2d 238, 247; *In re Michaelson* (9th Cir. 1975) 511 F.2d 882, 888.)
- **The identity of the client and the nature of that client's fee arrangement.** (*Hays v. Wood* (1979) 25 Cal.3d 772, 785.) However, such information may be privileged when the person invoking the privilege can show a strong probability that disclosure of the information would implicate the client in the very criminal activity for which the legal service was sought. (*DeBlase v. Superior Court* (1996) 41 Cal.App.4th 1279, 1285.) Another exception exists when the disclosure of the client's identity would reveal the nature of the legal problem or personal confidential information about the client. (*Rosso, Johnson, Rosso & Ebersold v. Superior Court* (1987) 191 Cal.App.3d 1514, 1519.)
- **The purpose for which the attorney was retained and a general description of the type of service provided.** (*U.S. v. Legal Servs. for New York City* (D.C. Cir. 2001) 249 F.3d 1077, 1081.)
- **The factual circumstances surrounding the attorney-client communication.** (*Mitchell v. Superior Court* (1984) 37 Cal.3d 591, 601 n.3 (date on which person first consulted with attorney is not privileged); *State Farm Fire & Cas. Co. v. Superior Court* (1997) 54 Cal.App.4th 625, 640 (privilege does not protect fact that communication took place, or time, date, or participants in communication).)
- **An attorney's impression of a client's mental state.** (See *People v. Perry* (2006) 38 Cal.4th 302, 316 (counsel's comments at bench conference about risk that defendant would become violent were based on counsel's past experience with defendant; they "did not reveal any confidential communications with his client, and thus did not violate" attorney-client privilege).)
- **Police reports prepared in the course of performing duties that were later communicated to attorney.** (*Green & Shinee v. Superior Court* (2001) 88 Cal.App.4th 532.)
- **Fee arrangements and contract.** (*Hays v. Wood* (1979) 25 Cal.3d 772, 785.)
- **Billing statements and time sheets.** (See *Real v. Continental Group, Inc.* (N.D. Cal. 1986) 116 F.R.D. 211, 213.) However, if the contents of a bill might reveal client confidences or the attorney's theories or strategy, the bills may be redacted to protect the privileged information. (*In re Grand Jury Witness (Salas v. U.S.)* (9th Cir. 1982) 695 F.2d 359, 362.)

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7 Simple Rules To Preserve Attorney-Client Privilege



Consider this scenario: Your corporate client asks you for advice on the legality of a new marketing strategy. You issue an opinion that certain aspects of the plan are marginally legal, but that the audit-risk is low unless your client's competitors chose to sue. Your opinion letter is reviewed and filed in the company's general files, and your client decides to accept the risk and goes forward with the strategy. Murphy's law comes into play and your client is sued by its competitor, which asks for all communications with you about the new

marketing strategy, including your opinion letter. Might the corporation be forced to turn over its communications with you? Yes. Could such a result have been avoided? Yes.

The key to both answers is confidentiality, a critical factor in both the attorney-client privilege and the attorney work product doctrine. In this scenario, your corporate client, i.e., the party asserting the attorney-client privilege, must prove that the privilege applies to avoid having to turn over your opinion letter. (See *D.I. Chadbourne Inc. v. Superior Court* (1964) 60 Cal.2d 723, 729, 36 Cal.Rptr. 468.)

Had you followed these seven rules you would have gone a long way toward helping your client preserve the attorney-client privilege:

1. **Privileged or confidential documents are labeled as such.** Because the assertion of the attorney-client privilege by a corporation is given enhanced scrutiny by courts, corporations must be careful to mark privileged/confidential documents as such and identify the persons who authored and received them.
2. **Non-decision makers who speak with counsel are instructed not to discuss the matter; written acknowledgment of this admonition is obtained.** If, to render legal advice to the corporation, the corporation's attorney must obtain necessary information from a corporate employee who is not a top echelon decision maker, that employee must be told, and should acknowledge (preferably in writing), that the communication with the corporation's attorney is confidential and is not to be discussed with anyone, even other employees of the corporation.
3. **Attorney-client communications are not disclosed to anyone other than top echelon decision makers.** As much as possible, privileged communications should not be disclosed to anyone within the corporation other than top echelon decision makers, and if disclosure to non-top echelon decision makers becomes necessary, make it only to those employees who absolutely need to know the information, and only when the information to be disclosed is within the scope of their corporate duties.
4. **Information is not shared with third persons.** Ensure that the communication is not shared with third persons who are not bound by a duty of confidentiality.
5. **Confidential documents are segregated and kept under lock and key.** Maintain confidential documents under lock and key and segregated from non-confidential documents if possible. Reserve access to these documents to only those people who need to know this information.
6. **Confidential documents are not sent via email or fax.** Faxes and email are typically accessible to persons other than the intended recipient. To avoid a potential waiver by disclosure to unnecessary third parties, avoid these methods for privileged communications.

7. **Attorney-client communications are not referred to in communications with anyone outside the “Need-to-Know” group.** Avoid even general references to the existence of or the subject matter of the communications, e.g., “We asked our attorneys and they told us ...,” or, “We have been advised by counsel that ...,” or “We took these actions after consulting with our lawyers.” Such statements may waive the privilege and entitle the opposition to inquire into the advice sought and received, including what counsel did to develop the advice.

For more on preserving the attorney-client privilege, go to CEB’s [California Civil Discovery Practice](#), ch. 3. Also check out CEB’s program [FAQs: The Lawyer’s Duty of Confidentiality](#), available On Demand, which provides an hour of MCLE credit in Legal Ethics.

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8 Tiny Changes to Make Your Life 10 Times More Enjoyable

Do not underestimate the cumulative power of small, steady changes in your daily routines.



I think we are all open to making changes in our lives that make us happier and more successful, but few of us follow-through because committing to something that is going to change our lives is a daunting and massive undertaking, right?

Not necessarily.

Instead of focusing on huge, radical steps, start moving forward by incorporating these eight changes that are so small and simple that you can implement them immediately.

These eight steps can drastically change your life for the better.

1. Reprogram your mind to stay positive.

Our thoughts and actions are influenced by our feelings. That is why when you are just feeling “blah” because the weather is crummy or you had a stressful week all you want to do is stay in bed.

Here is the problem. Negativity is all around us. There’s nothing we can do about that, either, but what can do is learn how to reprogram our minds to stay positive. You cannot trap every negative thought in the “happy-clappy” end zone of your mind, but can take charge of your thoughts by:

- Keeping a gratitude journal. Jot down what you're thankful for every day instead of worrying what you don't have. Gratitude will make you happier, increase your productivity and help you sleep better at night.
- Creating and repeating positive affirmations that acknowledge the progress you are making in the areas where you want to improve.
- Surrounding yourself with positive people who lift your spirits. Remember, emotions are contagious.
- Don't acknowledge negative thoughts.
- Staying active. Exercise releases endorphins, but idleness leads to over-analyzing and overthinking.

2. Set your alarm half an hour earlier.

One traits many successful individuals have in common is they get up early. While you don't have to wake up at the ungodly hour of 3:45 a.m., like Apple's Tim Cook, you could start setting your early half an hour earlier. So, if you normally set your alarm for 7 a.m., set it for 6:30 a.m.

The reason?

This will give you some extra time in the morning to exercise, meditate, read, check your emails, have breakfast with your family, plan your day or work on something that you're passionate about. It saves you from rushing out the door each morning feeling forgetful, unaccomplished and discombobulated. Time tracking is key to self-improvement.

3. Clean up after yourself immediately.

How long does it really take to make your bed or wash your morning dishes? Maybe five minutes? Here's the thing. If you don't stay on top of these minor chores, they quickly build-up. That cereal bowl and coffee mug becomes a sink full smelly dishes that take a lot of time to clean. If washed immediately, you wouldn't have this headache.

What's more, people who immediately clean-up after themselves, like making their beds every morning, tend to be happier, as well as more successful since it makes you feel accomplished, removes clutter, and gives them a sense of control.

4. Don't over-commit.

A common theme I notice with self-help advice is how people make goal-setting sound easy. They'll suggest that you get more exercise or sleep, but that's easier said than done when you're working 12 hour days and helping with a newborn.

I'm not making excuses. Far from it. It's just easier to commit and follow through successfully if you keep your goals simple and clearly defined. Start small and work your way up. Don't jump into a marathon headfirst if you need more exercise. Start with 10 push-ups a day, a walk down your block after dinner or this seven-minute workout plan that you can do in your room.

If you want to start eating healthier but aren't much of a cook, try a service like Blue Apron or Sun Basket. They send healthy ingredients to your home and give you step-by-step instructions on how to prepare the meals. If you want to start meditating, start with devoting five minutes a day.

This rings true in the business world as well. When we started my company we tried to be everything to everyone. Now, we focus on being the best invoicing company out there. Don't overpromise and under deliver.

5. Don't be so predictable.

Doing the same thing each and every day puts us in a rut. One of the best things that you can do for yourself is to stop being so predictable. Break out of your comfort zone at least once a week and do something new that you've never done before. Try that Thai restaurant. Go snowboarding. Purchase a wardrobe from a different store.

You get the point.

Opening ourselves up to new experiences makes us happier, changes our perspectives, helps us recognize new opportunities, boosts energy and makes us more receptive to change. This cycle circles back. New experiences will make you happier.

6. Swap complaining for expressing gratitude.

Even during my darkest times, I always tried to remain optimistic by reminding myself that despite the failure of my business, I still had the support of my family and friends. That helped me make the best of an otherwise dire situation.

One of the best ways to feel better when you need it most is by showing your gratitude. Be thankful for the best thing that happened to you today. I already mentioned keeping a daily gratitude journal, but I want to stress *this can change your life*. Researchers have found that;

- Those who keep a weekly gratitude journal tend to exercise more, have fewer physical symptoms and are more optimistic about their futures.
- Daily discussion of gratitude can increase alertness, enthusiasm, determination, attentiveness, energy and sleep duration, as well lower reports of depression.
- Individuals who think about, talk about or write about gratitude daily are more likely to help someone with a personal problem or offer emotional support.
- Those who are grateful place less importance on material goods, are less envious of others and are more likely to share their possessions with others.
- Daily gratitude practices may help prevent coronary artery disease.

Show your gratitude to friends, family, clients and colleagues. Sincerely thanking people is one of the best ways to strengthen relationships. After all, doesn't it feel awesome when someone thanks you for your hard work, doing a chore, or just listening when they need to vent?

7. Stop comparing yourself to others.

Stop losing sleep over what others have and what you don't. Here's the truth: there is always going to be someone who has a better paying job, lives in a nicer house, drives a fancier car and goes on more exotic vacations. Your friends may start families before you. Some might get to retire early.

Comparing yourself just makes you miserable and unhappily preoccupied about what others consider success. Instead, worry about what you define as success. When I started freelancing, I had friends who mocked me because I wasn't making as much money as they were. The way I saw it, I had a flexible schedule, got to work wherever I wanted and never complained about work since I enjoyed what I was doing. My friends that gave me a rough time complained constantly about their jobs, colleagues, waking-up so early, etc.

Who do you think was happier?

8. Tackle the one thing that you've been putting off.

We all put off that one thing: the phone call to your insurance company, cleaning up your desk, changing the batteries in the smoke alarms. Just like those dirty dishes I discussed earlier, setting priorities includes making certain seemingly small tasks don't build-up until you have to spend an entire day catching up.

If you have unfinished tasks, you are carrying a heavy weight around with you all the time, no matter how small each task is. You have to remember it. If possible, when you think of it, do it right then.

After you've listed your priorities for the day, add a long-standing chore to your to-do-list. For example, at the end of the workday, you'll make that phone call or organize your workplace since you've already gotten all of your most important, and energy-draining, tasks done for the day.

You'll be surprised at how much better, and productive, you'll feel once you've crossed these items off your list – even if it's just a mental list. Free yourself.



John Rampton
Entrepreneur and Connector

About the Author

John Rampton is an entrepreneur, investor, online marketing guru and startup enthusiast. He is founder of the online invoicing company Due. John is best known as an entrepreneur and connector. He was recently named No. 3 on Top 50 Online Influencers in the World by Entrepreneur Magazine and has been one of the Top 10 Most Influential PPC Experts in the World for the past three years. He currently advises several companies in the San Francisco Bay area.



TRAVEL TIPS & TRICKS

Things You Should Always Do on a Plane

If you think finding your seat and fighting for overhead space are all you need to do when you get on a plane, you could be putting your comfort (and your health) at risk. Here is what you need to do as soon as you get on the plane.



Sanitize Your Area

There is no gentle way to say this: [Planes are gross](#). Microbiologists estimate that airplane tray tables have an average of 2,155 colony-forming units (CFUs, aka “germs”) per square inch. That is compared to the 70 CFUs per square inch that lurk on airport bathroom stall locks. Pack some sanitizing wipes and wipe down your tray table, seatback TV, [remote control](#), armrests, and seatbelt latch—basically any hard surface you are going to touch during your flight.



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Position Your Vent

Speaking of germs, if you're trapped in an enclosed space with someone who has a contagious disease, you've got a pretty good chance of catching the virus. If you want to really freak yourself out, read about your chances of [catching something from a sick passenger](#)—like TB, which you can catch if you're within two rows of patient zero; or SARS, which can transmit to flyers as far of seven rows away.

Save yourself by blowing away the germs via the air vent above your head. Set the ventilation to low or medium and position it directly in front of your head, blowing straight down. If you can feel the air flow on your lap, you've done it right.



Count the Rows Until the Exit

No one ever plans to be in a plane crash. But if you take a moment to mentally prepare for one, you increase your chances of survival if the worst does happen. Count the number of rows between your seat and the closest emergency exit. If the plane goes down or makes an emergency landing, you may have to make your way out of a dark, smoke-filled cabin where you can't see the exit. If you know exactly how many rows stand between you and the exit, you can feel your way out, counting the rows by hand.

You only have about 90 seconds to evacuate a burning airplane for the greatest chance of survival, and you don't want to waste valuable time trying to find a way out. Make sure you've mentally selected a back-up exit as well, in case your closest door is blocked.



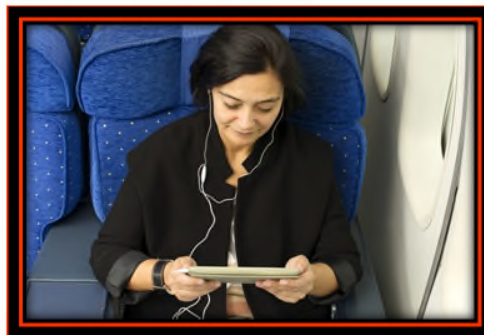
Check for a Life Vest

Although the flight crew checks each seat for a life vest at the beginning of every day, they usually don't check them between flights. Unfortunately, some people [do actually steal life vests](#), so do a quick check under your seat for yours, especially if you'll be flying over water.



Gather Your In-Flight Essentials

After you've taken care of your health and safety essentials, it's time to focus on your in-flight comfort. If you're stashing your personal bag in the overhead compartment, make sure to take out [everything you'll need during your flight before putting it above your seat](#), so that you're not constantly getting up and down—or stranded without something you need when the seatbelt sign is on.



Put on Your Headphones

If you don't want to talk to your seatmates, popping your [headphones](#) as soon as you sit down is the universal “no conversation please” signal. Be sure to put yours on even if you're not listening to anything just yet. (Take them off for the flight safety demonstration, of course.)



Chew Gum

If you have sensitive ears that painfully pop during take-off or landing, chew some gum before you go airborne. This can help with air pressure changes and make you feel better. Plus, you'll have fresher breath when you land.



Make Sure Your Seatback TV Works

Got a long-haul flight and don't want to be stuck staring in to space for hours? Make sure that your seatback TV is working. If you have drawn the broken machine, the flight attendant may be able to move you to another seat so that you can enjoy the in-flight entertainment (instead of sadly trying to watch your neighbor's).



ADVISORY

Ninth Circuit Holds Website Can Lose DMCA Safe Harbor by Using Moderators

Earlier this month, the Ninth Circuit Court of Appeals held that an online provider may become ineligible for the safe harbor provided by Section 512(c) of the Digital Millennium Copyright Act if its moderators help select content submitted by users. (*Mavrix Photographs, LLC v. LiveJournal, Inc.* (9th Cir. Apr. 7, 2017) ___ F.3d ____). The decision may signal a departure from the traditional expansive protection under Section 512(c), which protects websites from claims that user content infringes copyright if they expeditiously take down the content upon notice.

Mavrix concerns LiveJournal.com, a social networking service used to create "communities" where users can post and comment on a particular topic. LiveJournal's most popular community—and the forum for the alleged infringement—is "Oh No They Didn't" ("ONTD"), which focuses on celebrity gossip.

Not all submissions are posted to the ONTD community. Instead, users submit posts to volunteer moderators, who review them to ensure compliance with LiveJournal's rules, including a prohibition on copyright infringement. In addition, LiveJournal pays one full-time employee, who, among other things, also reviews and approves posts.

Mavrix Photo, a “Celebrity News Photo Agency,” sued LiveJournal, claiming 20 of its photographs were posted on ONTD without permission. Notably, Mavrix did not use LiveJournal’s notice and takedown procedure before filing suit. As soon as the lawsuit commenced, LiveJournal took the infringing pictures down.

The district court granted summary judgment to LiveJournal, finding it protected under the DMCA’s safe harbor provision. (17 U.S.C., § 512(c).) The Court of Appeals reversed.

Under Section 512(c), a provider may claim safe harbor immunity if, in addition to complying with the DMCA’s technical requirements (e.g., having an appropriate notice and takedown policy), it can establish (1) the infringing content is stored “at the direction of a user;” (2) the provider does not have actual or “red flag” knowledge of the infringing material; and (3) upon obtaining knowledge of the infringing material, the provider “acts expeditiously to remove, or disable access to, the material.” (17 U.S.C., § 512(c).)

The Ninth Circuit held that the safe harbor might not apply to LiveJournal because there were issues of fact whether the photos were stored “at the direction of the user.” It distinguished between a provider that passively allows infringing content to be posted and one that screens and posts allegedly infringing material. The court held the former is eligible for the safe harbor, but the latter may not be. A court should apply agency principles to decide whether a moderator’s actions can be imputed to the provider, removing it from the safe harbor’s protection.

Applying this rule to the facts before it, the Ninth Circuit held a reasonable juror could conclude that an agency relationship between LiveJournal and its moderators existed because (1) LiveJournal selected moderators and provided them specific directions; (2) evidence existed suggesting LiveJournal users may have reasonably believed that the moderators had authority to act for LiveJournal; and (3) LiveJournal maintained significant control over ONTD and its moderators by providing substantive supervision and selecting and removing moderators. According to the court, whether the moderators were paid was not dispositive.

This portion of *Mavrix* is in tension with at least one other federal circuit court decision, *CoStar Grp., Inc. v. LoopNet, Inc.* (4th Cir. 2004) 373 F.3d 544, 556, in which the Fourth Circuit held that a website’s automated and manual review of user photos, including for infringement, did not strip the site of the DMCA safe harbor. Although the *Mavrix* court suggested that automated review does not threaten a website’s protection, manual review does: “The question for the fact finder,” the court held, “is whether the moderators’ acts [are] merely accessibility-enhancing activities” or whether their acts go “beyond the automatic and limited manual activities we have approved as accessibility-enhancing.” As a result, providers may be more likely to stop screening for infringing content or, at a minimum, scale back any manual review.

The Ninth Circuit discussed the remaining elements of the safe harbor “to provide guidance to the district court.” It held a provider cannot claim it has no actual knowledge of the infringement merely because the plaintiff does not provide notice of infringement, i.e., send what are commonly referred to as “DMCA takedown notices.” Instead, Mavrix was entitled to take the depositions of the moderators to discover their subjective knowledge. Applying agency principles, the moderator’s knowledge of infringement could be imputed to the provider.

Even if Mavrix could not show actual knowledge of infringement, the Ninth Circuit suggested LiveJournal may have had “red flag” knowledge, i.e., was aware of facts that would have made the specific infringement objectively obvious to a reasonable person. Some of the allegedly infringing photographs bore a watermark containing the URL for Mavrix’s website. The court stated: “the fact finder should assess if it would be objectively obvious to a reasonable person that material bearing a generic watermark or a watermark referring to a service provider’s website was infringing.”

LiveJournal’s structure may create more complex questions under the DMCA than a traditional, exclusively volunteer-run “community.” The evidence suggests factual questions existed as to the extent of ONTD’s only

paid moderator's control. Theoretically, had LiveJournal not overseen its volunteers, the court may have reached a different conclusion.

Regardless, the Ninth Circuit's opinion may signal a narrowing of what has historically been a broad immunity, and is one of only a handful of appellate decisions discussing what it means to store content "at the direction of a user."

Disclaimer

This advisory is a publication of Davis Wright Tremaine LLP. Our purpose in publishing this advisory is to inform our clients and friends of recent legal developments. It is not intended, nor should it be used, as a substitute for specific legal advice as legal counsel may only be given in response to inquiries regarding particular situations.

April 4, 2017 – By Jim Rosenfeld, Ambika Doran, and Rachel Herd



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Thank you for your continuing support of our local association.*

**SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION
CHAPTER ACHIEVEMENTS**

(Please submit this form each month.)

Month: May 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

May Brown Bag Presentation



“Thought About Law School?”

Making the Leap from Legal Secretary to Lawyer

Presented by Lisa Águeda, Esq., Pranger Law PC

Tuesday, May 23, 2017

12:30 – 1:30 p.m.

Altshuler Berzon, LLP

177 Post Street, Suite 300, San Francisco, CA 94104

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.

RSVP to: Sally Mendez Arevalo – smendez@altshulerberzon.com - by: Friday, May 19, 2017

About the Speaker:

Ms. Águeda started her career in law as a legal secretary, paralegal, and a law clerk while attending law school. She then joined Pranger Law PC as an associate attorney after becoming a member of the State Bar of California. She has volunteered for Meals on Wheels of San Francisco, served on the Leukemia Lymphoma Nominating Committee for The Man/Woman of the Year Event, and interned at The Homeless Action Center in Berkeley. When not at the office, she can be found exploring the dining scene in San Francisco and training for her next marathon. Ms. Águeda is a native Portuguese speaker, and a fluent Spanish speaker.

Ms. Águeda focuses her practice on all aspects of trademark law. She works on search and clearance of new marks, registration with the United States Patent and Trademark Office and global expansion of trademark portfolios, as well as enforcement efforts to protect rights including cease and desist.

Ms. Águeda is a member of the State Bar of California Intellectual Property and Litigation Sections, the San Francisco Intellectual Property Law Association, the American Bar Association Intellectual Property and Litigation sections and the International Trademark Association (INTA).



Santa Clara County Legal Professionals Association June 2017 Dinner Meeting



“Unlawful Detainer Laws – What Everyone Needs to Know”

Guest Speaker:
Todd B. Rothbard, Esq.

What is an unlawful detainer action? Join us as Attorney Todd Rothbard explains the process of preparing and serving pre-eviction notices, three-day notices, the differences between commercial and residential actions, and when and how the notices should be served.

Register and pay via PayPal* on our “Upcoming Events” page at <http://www.sccolpa.org>. Or RSVP via email at reservations.sccolpa@gmail.com. **NOTE:** Please put SCCoLPA Reservation in the title of your email. Make checks payable to “SCCoLPA.” Cash or checks accepted at the door.

No refunds if reservation is canceled within 24 hours of the event. *\$3 convenience fee added for PayPal/credit card payments



Tuesday, June 13, 2017

TIME

Social Hour: 6:00 p.m.
Dinner/Program: 6:30 p.m.



Flames Eatery & Bar
88 S. Fourth Street, San Jose, CA 95113
408-971-1960 • validated parking at the 4th Street parking garage.

COST

\$35.00 (dinner, dessert & CCLS credit)
\$20.00 (CCLS credit; no dinner)
Free (no dinner or CCLS credit)

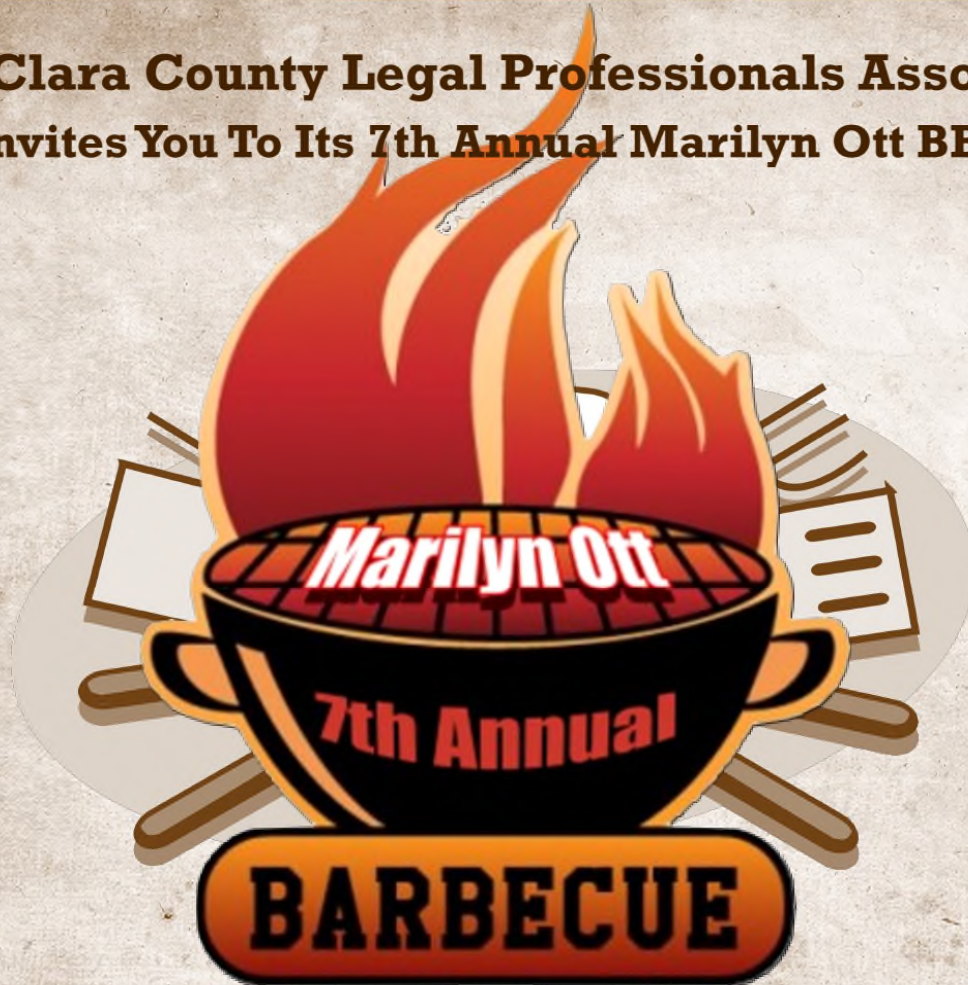


This activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 0.75 hours, of which 0.00 hours will apply to legal ethics, law practice management, prevention, detection, and treatment of substance abuse and emotional distress, or elimination of bias. SCCoLPA certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing minimum continuing legal education. CCLS credit will be offered in the amount of 0.75 hours.

UPCOMING EVENTS

June 17, 2017	7 th Annual Marilyn Ott BBQ – FREE FOR ALL SCCoLPA MEMBERS!
July 11, 2017	Dinner Meeting – “Getting a Job – From Resume to Interview”
August 5, 2017	San Jose Giants – “SJ Giants v. Inland Empire 66ers”

**Santa Clara County Legal Professionals Association
Invites You To Its 7th Annual Marilyn Ott BBQ**



Saturday, June 17, 2017 • 4:00 p.m. to 8:00 p.m.
**Bring your family and friends and join us for a
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**In appreciation of your membership in SCCoLPA,
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Enter your favorite dessert in our contest to win a special prize!

**Proceeds fund SCCoLPA's scholarship and educational endeavors
See our website (www.sccolpa.org) for details**

**Please RSVP by June 15, 2017
to SCCoLPA Reservations
reservations.sccolpa@gmail.com**

**Location: Past President 2010-2014
Rod Cardinale's Backyard
737 Asbury Place, Santa Clara, CA 95051**





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



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APPLICATION TO TAKE CCLS® EXAM

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

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

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

EXAMINATION FEES (Select Payment Type)		Check <input type="checkbox"/> Payable to "LSI" Mail to above address	PayPal <input type="checkbox"/> Email exam application to CCLSCertifyingBoard@gmail.com . Payment link will be provided upon confirmation of eligibility to sit for exam.
LSI Members <input type="checkbox"/>		Non-LSI Members <input type="checkbox"/>	
On Time Registration Fee	\$ 25.00	On Time Registration Fee	\$ 75.00
Examination Fee*	100.00	Examination Fee*	100.00
Late Fee (if applicable)	30.00	Late Fee (if applicable)	30.00
TOTAL DUE w/o Late Fee:	\$125.00	TOTAL DUE w/o Late Fee:	\$175.00

Personal Information

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Phone (Day): _____ Phone (Evening): _____
LSI Member: ☐ Yes (enclose copy of LSI Membership Card) ☐ No
Name of Local LSI Association: _____

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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

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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
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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):



LEGAL SPECIALIZATION SECTIONS SEMINARS

May 19 and 20, 2017

Doubletree Hotel
Modesto, CA

The deadline to register without a late fee is Friday, May 12, 2017.

LSS MEMBER Free with Advanced Reservations \$5 at the Door/After Deadline -- Handout Only: \$5	NON-LSS MEMBER \$15 with Advanced Reservation \$20 at the Door/After Deadline -- Handout Only: \$15
Friday, May 19 – 1:30 p.m. to 3:30 p.m.	
<u>Criminal and Family Law</u> Domestic Violence Restraining Orders Stacy Speiller, Esq. Cash-Dudley Speiller & Torres <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER	<u>Law Office Administration</u> Employment Law Updates Jeanine DeBacker, Esq. McPharlin Sprinkles & Thomas LLP <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER
Friday, May 19 – 4:00 p.m. to 6:00 p.m.	
<u>Probate/Estate Planning</u> Understanding Probate Code 17200 and 850 Petitions Kimberly G. Flores and Beau C. Correia Berliner Cohen, LLP <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER	<u>Civil Litigation</u> eFileCA: What's Happening, What's The future, and Rules of Court Lilibeth Daniel One Legal, LLC <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER
Saturday, May 20 – 4:00 p.m. to 6:00 p.m.	
<u>Federal Law</u> Immigration Law Updates Emily Chrim, Esq. The Law Office of Emily M. Chrim <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER	<u>Transactional</u> Real Estate Transfers and Deciphering the Legal Description Brett Dickerson, Esq. Gianelli & Associates <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER

Name: _____ ☐ CCLS ☐ Paralegal ☐ PLS

E-mail: _____

Local LSI Association (if applicable): _____

PAYMENT: CREDIT CARD & PAYPAL AVAILABLE AT WWW.LSI.ORG

☐ CHECK MADE PAYABLE TO **LSI**

REGISTER AND PAY ONLINE OR SEND COMPLETED FORM AND PAYMENT TO:

C/O DAWN R. FORGEUR, CCLS, LSS COORDINATOR
500 CAPITOL MALL, SUITE 1600, SACRAMENTO, CA 95814
QUESTIONS? EMAIL: DAWN.FORGEUR@STOEL.COM

The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 2.0 hours each, by the State Bar of California. California Certified Legal Secretary credit offered is 2.0 hours.

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, PLUS \$25 PENALTY, PLUS THE ACTUAL COST CHARGED LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL CHECK.

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

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

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



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

Festivals and Events

MAY 6

Cinco de Mayo

Dolores Park, Dolores Street between 18th and 20th Streets

www.mncsf.org and www.sfcincodemayo.com

Bring a picnic basket and enjoy music, kid's activities, entertainment, food, arts and crafts all day. Family-friendly, alcohol free.

MAY 7

How Weird Street Faire

Howard and Second Streets

<http://www.howweird.org>

Billed as a "street fair for the 21st century," the event includes nine stages of music over seven city blocks; food and vendors from around the world, and educational booths.

MAY 7-OCTOBER 29

Yerba Buena Gardens Festival

Yerba Buena Gardens, 415-543-1718

www.ybgf.org

The Yerba Buena Gardens Festival encompasses nearly 100 artistic, cultural and community events from May through October in Yerba Buena Gardens. Events include popular and operatic music series, cultural festivals, dance performances, international music concerts, visual art exhibits, theater and spoken word performances.

MAY 8-14

[SFMade](http://www.sfmade.org)Week

Citywide, 415-408-5605

www.sfmade.org

SFMade presents a week-long celebration of San Francisco's vibrant manufacturing sector; discover locally made products, the people who make them and where to buy them.

MAY 11-JUNE 18

Best of PlayGround

Potrero Stage, 1695 18th St., 415-992-6677

www.playground-sf.org/

PlayGround, San Francisco's incubator for a new generation of playwrights, caps off its season with the Bay Area's largest celebration of new works for the stage – the annual PlayGround Festival of New Works.

MAY 13

Uncorked – The San Francisco Wine Festival

Ghirardelli Square, 415-775-5500

www.ghirardellisq.com

Enjoy tastings from a variety of Bay Area wineries and experience the ambience of the waterfront and entertainment throughout Ghirardelli Square and along Beach Street.

MAY 19-21

Crossroads Film Festival
San Francisco Cinematheque
www.sfcinematheque.org/

Founded by filmmaker Bruce Baillie in 1961, San Francisco Cinematheque is the Bay Area's premier venue for avant-garde/experimental, underground and personally expressive film and video work. In our steadfast dedication to exhibiting works of aesthetically radical cinema from all historical eras and geo-political locales, San Francisco Cinematheque celebrates the breadth and depth of this vibrant art form in all its myriad expressivities.

MAY 19

PIER 39 Spring Wine Pour
PIER 39
www.pier39.com

Grab your friends and head to The PIER for an evening of wine, music and fun at the PIER 39 Spring Wine Pour. Stroll The PIER and stop by participating businesses to enjoy wine tastings, light bites, exclusive discounts, and live music and entertainment.

MAY 21

Bay to Breakers
The Embarcadero to the Great Hwy., 415-231-3130
www.baytobreakers.com

Since 1912, tens of thousands of people have gathered in San Francisco to see the world's largest footrace unfold as more than 70,000 costume-clad runners and walkers make their way from San Francisco Bay, a few blocks from the Embarcadero, to the Great Highway where the breakers crash onto the Pacific Coast's Ocean Beach.

MAY 25-JUNE 11

San Francisco International Arts Festival
[Fort Mason Center](#)

Performances by more than 70 theater, dance and music ensembles from the Bay Area and 10 countries unfold in the space of three action packed weeks. The festival features a major arts exhibition as well as multiple educational, residency and outreach activities.

MAY 27-28

Carnaval San Francisco
Mission District, 415-206-0577
www.carnavalsanfrancisco.org

Celebrating its 38th anniversary, this is San Francisco's version of Mardi Gras and one of the largest annual public events in the city. It features exotic Carnaval dancers with a mixture of Latino, jazz, samba, Caribbean influences. Festive parade on Sunday morning draws upon a broad cultural pageantry.

Member Benefits

Advantages of Membership

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

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

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

MAKE A CAREER CHOICE – BECOME A LEGAL PROFESSIONAL

Why Become a Legal Professional?

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

Why Join Legal Secretaries, Incorporated?

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

How You Can Become a Legal Professional:

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

Discounts for LSI Members

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

LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

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

<p>WORKING ADVANTAGE Toll Free: (800) 565-3712 www.workingadvantage.com</p> <p>Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more.</p> <p>Member ID: Contact LSI Corporate Office, lsiorg@suddenlink.com, or LSI Vice President</p>	<p>HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com</p>
<p align="center">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</p> <p>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</p> <p>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</p> <p>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</p> <p>California Insurance License: 0E88330 10% discount on Long Term Care, call for information on life, long term, and disability insurance, as well as commercial and residential lending</p>
<p align="center">CREDIT UNIONS</p>	
<p>LA FINANCIAL FEDERAL CREDIT UNION P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org</p> <p>Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p>PROVIDENT CREDIT UNION 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 www.providentcu.org</p> <p>All LSI members are eligible to join.</p>

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
jlpage@ix.netcom.com

Revised 6/12/2014

Editor's Message

By: Sally Mendez

HAPPY MONTH OF MAY EVERYONE!!!!

Thank you everyone for taking the time to read our newsletter. We had a lot happen this month and we are looking forward to a new fiscal year filled with lots of opportunities and activities. As a quick reminder, please be sure to submit your membership renewal for this new fiscal year. Please don't let this be your last issue. You can find our membership renewal form on page 39 and on our website. We don't want you to miss out on all our fun educational opportunities and membership perks.

On another note, I hope you are enjoying a little bit of our wonderful California Weather! We are truly spoiled in our Sunshine State and of course in our beautiful City of San Francisco. I hope you continue to enjoy this month and weather... and that you hopefully will have some down time to sit and enjoy a game or two.

The Golden State Warriors are in the playoffs and Lead NBA Conference Finals against San Antonio Spurs 2-0!!! This is very exciting for all of us Bay Area Folks. Stay tuned!!



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