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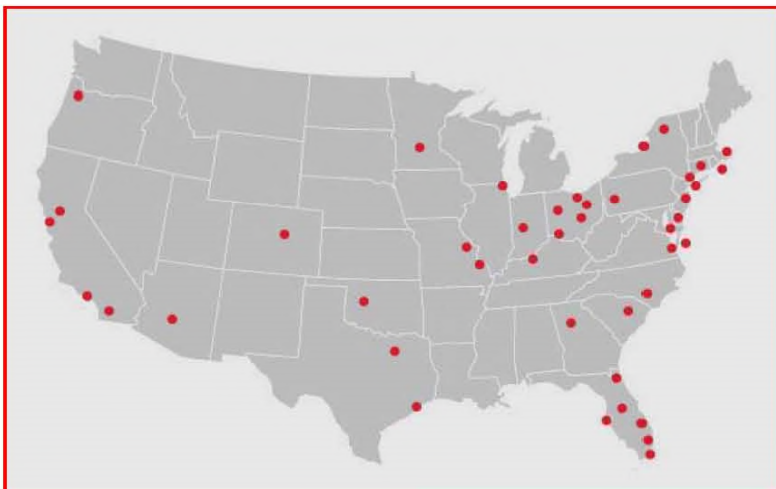
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President's Message

By: Larry McGrew



Greetings SFLPA Members and Friends:
Tis the Season!!

October was a very productive month for us. We had a fantastic Membership Meeting thanks to Suddie Scott and Ogletree Deakins, LLP for hosting our meeting. A very special thanks to Mr. Michael Thomas who provided a fantastic presentation on “Laws Impacting Diversity and Inclusion.” Everyone seemed to enjoy it.

We also hosted our first Mock Trial Event at the UC Hastings School of Law. Our Day-in-Court chair Lillian Wong did a fantastic job as we were able to have some very special guests. We were grateful to have The Honorable Carlos T. Bea of the U.S. Court of Appeals for the Ninth Circuit as our Presiding Justice for the evening. We also thank Jennifer Page, CCLS and LSI President for her portrayal of the King in the “Humpty Dumpty v. The King” mock trial. We appreciate all who came and supported this special event and we appreciate U.C. Hastings College of Law for allowing us to use one of the court classrooms for this event.



Our Brown Bag Presentation was provided by Cyndee Saucedo, CCLS, a very close friend of ours from Alameda County LSA and she is currently their Governor. A legal assistant at Meyer Nave, Cyndee provided a wonderful presentation on “Citations and Table of Authorities.” Our Education Chair, Francie Skaggs, is doing a fantastic job lining up wonderful educational presentations for our members and we are fortunate to have Coblentz, Patch, Duffy & Bass, LLP to allow us to host these events at their offices.

As we now move into November, there were quite a few of us who attended the LSI Quarterly Conference at the McClellan Conference Center in Sacramento. The host association was Placer County LPA and they did a fantastic job. Members attending from the SFLPA were: Governor, Christine Flores, CBA; “Veep” Carol Romo; Secretary, Sally Mendez; Parliamentarian, May Sene; as well as myself. It was a very good conference and our hats go off to Placer for hosting a fantastic conference for their very first time.

As know, the SFLPA has been looking to bring back a conference to San Francisco. Carol and I were fortunate to enlist the assistance of Elizabeth Caragay Watts-Russell of Helms Briscoe who narrowed down our search to the Hilton Financial District Hotel in San Francisco. We in the process of final negotiations with the hotel, so here’s hoping that all goes well. If everything goes smoothly, we will submit our bid to LSI to host the November 2019 Quarterly Conference in San Francisco. There likely will be some competition as Desert Palm LPA has informed us that they, too, will be bidding for the same conference. If this is the case, then the decision will go to a vote by the Board of Governors at the Annual Conference in May 2018 at the Beverly Garland Hotel in Los Angeles.

Continued to next page.

Upcoming events to Save the Date:

- SFLPA Holiday Party – Thursday, December 7, 2017
- Interclub Association – SFLPA and Alameda County LSA Ethics Workshop – Saturday, January 13, 2018
- SFLPA General Membership Meeting – Wednesday, January 17, 2018
- SFLPA Legal Professionals 3-Week Training Course – Begins Saturday, January 27th, additional Saturday class dates are: February 3rd and 10th. Early Registration deadline is December 15, 2017.
- SFLPA Crab Feed Fundraiser Event – Sunday, February 18, 2018

Event flyers as well as the registration form for the training course are just about ready to be distributed. So please, mark your calendars and get your registrations and RSVPs in as early as possible.

As you are all aware, our Brown Bag Presentations will be dark for the months of November and December due to the holidays. Our first presentations of 2018 will be on Tuesday, January 23, 2018 so please mark your 2018 calendars now and be on the lookout for more details.

Lastly, our membership approved the funds to upgrade our website. The new site has been developed and we are working on updating the content. The website will be able to do so much more than before, including event registrations and credit card payments on-line. Members will also be able to submit membership applications and renewals online as well. We are very excited about this upgrade and we hope to go live with the new website as early as December 1, 2017.

I would like to take this opportunity to thank everyone for all your support. I hope you all have a fantastic Thanksgiving Holiday and I hope to see you at our Holiday Party on December 7th.

Happy Thanksgiving to all our members and friends of the SFLPA.

Yours truly,

Larry McGrew
SFLPA President

Vice President's Message



By: Carol Romo

I am happy to announce that we initiated ten new members to our Association on October 17, 2017. They are:

Melanie Antonio	Legal Asst.	Atkinson Andelson Loya Rudd & Romo
Odaya Buta	Paralegal	
Lillian Byrd	Legal Secretary	Hanson Bridgett LLP
Denise DePropis	Paralegal	Goldstein Gellman, Melbostad, Harris & McSparran, LLP
Margarita Fernandez	Legal Secretary	Trucker Huss
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Jennifer Short	Legal Secretary	Markun Zusman Freniere & Compton LLP
Yolanda Wagemans	Legal Secretary	Orrick Herrington & Sutcliffe LLP

I will be hosting a Newcomers Luncheon on behalf of our Association on November 15 and 16 to personally welcome our newest members and so we can all get to know each other a little better as well as to share information about our upcoming events and answer questions.

I would like to thank the members who sponsored these newbies and helped ensure they found their way to our general membership meeting in October. I truly appreciate your continued support in making our Association bigger and stronger.

This month the Membership Committee will be starting its second campaign called "First Contact." This drive is designed to get our foot in the door to many law firms residing in the Financial District of our beautiful city. We hope to become reacquainted with these law firms and spark interest among their attorney support staff. Small packets containing marketing material along with a cover letter from yours truly will start going out to law firms next week. I will be following up these packets with a personal phone call in which I hope to procure a brief amount of presentation time (roughly 20 minutes) to their support staff.

Hopefully, we can draw enough attention to our future events to keep bringing in new membership applications from those law firms in which we have no members at this time. If you have any ideas or suggestions to help us in this endeavor, please send me an email (crodo@crowell.com). The Membership Committee always welcomes your suggestions and appreciates your support to help generate interest in membership among your co-workers and colleagues within and outside of your firms.

Next –Some short words on the word "Conference."

When I first joined San Francisco Legal Professionals Association, I used to hear the word "conference" being tossed around by the officers who spoke at our membership meetings. It really wasn't until I had the opportunity to attend my first conference in San Diego that I learned the magic behind that word. Since then, I have attended most of the LSI conferences that have been hosted by other Associations throughout the entire state. The locations for these conferences have included Knott's Berry Farm, Palm Springs, San Jose and Santa Rosa to name just a very few. Every time I went to a conference, I became more eager about getting more representation

from our San Francisco organization at these conferences. “After all,” I would say to myself, “we are San Francisco. Need I say more?” In the back of my head, and everywhere else maybe, I always had the idea of hosting one of these conferences in our own backyard. Not only that, but at every conference I have attended I was always asked by somebody from another LPA (Legal Professionals Association) or LSA (Legal Secretaries Association) when San Francisco was going to host a conference. Because, as those of us that live here know, EVERYONE wants to come to San Francisco – a historically world renown city.

Well, my dream is finally coming true. This month, at the next quarterly LSI conference in Sacramento, our current President Larry McGrew and I will be presenting our Association’s bid to host the November 2019 LSI Quarterly Conference here in San Francisco! Ultimately, if we “win” the bid, it will be a chance for us to put some money in our till to pass on to all our members in the form of financial relief for programs, meetings and events we currently all must pay for our Association to stay afloat. But getting the bid for conference also means we will ALL– every last one of our members– will need to help plan and prepare for the opportunity to showcase this beautiful City and give our fellow Associations a taste of what SFLPA is made of: top notch professionals who really know their stuff, including how to host a great conference.

So please wish me and Larry good luck as we start this journey – one that San Francisco has not ventured on in more than ten years. It’s going to be a lot of work but it will be even more fun, just wait and see.

Finally, Happy Turkey Day everyone. Please remember, when you’re sitting around the table with family and friends (or not), take a moment to give thanks to everyone past, present and future, who has made it possible for us to have all the things we have, which is more than those before us have had, thanks to their shared hard work and sacrifice. My dad is a Korean War Veteran, so I can tell you that in our family we all know what it means to be a true patriot, thankful and devoted to what this country represents and those who fought and died for it.

Until next time, cheers everybody and have a safe and wonderful Holiday!

Carol Romo, your Veep and Membership Committee Chairman 2017-18

Currently, only 26 states are fully compliant, so residents of those areas can continue to use their state-issued driver's license when passing through airport security. The remaining states, including New York, California, Illinois, and Louisiana, are currently under review. This means that they may be granted an extension and given more time to become compliant. Or it could mean that residents of these states will have to use an alternative form of ID when flying in 2018.

Alternative Forms of ID

The easiest back-up ID option is your passport. The problem is that only 36% of Americans have a valid passport, according to the U.S. Department of State.

At \$135, passports can be expensive and unnecessary, especially if you have no desire to travel internationally. In this case, a passport card may make the most sense. For starters, it is cheaper. First-time adult applicants can get one for \$55, and the cost is \$40 for children. The card is valid for 10 years (5 years if you are 16 or younger), after which a renewal will cost \$30.

Another perk of a passport card that makes it better than a license is that it allows for some international travel. Cardholders can use the wallet-sized document to re-enter the U.S. at border-crossings or ports-of-entry from Canada, Mexico, the Caribbean, and Bermuda.

The [TSA has a full list](#) of all identification that will be accepted, but some of the more popular alternatives include:

- DHS trusted traveler cards (Global Entry, NEXUS, SENTRI, FAST);
- U.S. military ID (active duty or retired military and their dependents, and DoD civilians);
- Permanent resident card;
- Border crossing card; and
- DHS-designated enhanced driver's license.

Time Is of the Essence

It is unclear if any states will be granted an extension, so if your state is not currently compliant, it is time to consider some other options. A passport can take four to six weeks to arrive, while a passport card can take up to three weeks. Applying now means shorter wait times, compared with next year when procrastinators will be looking for new IDs before their spring trips.

Even if your state does get an extension, it does not hurt to just get it out of the way. Beginning October 1, 2020, you can only use a REAL ID compliant driver's license or another acceptable form of identification for domestic air travel.

Please Note: This article was edited to clarify that passport cards can only be used at border-crossings or ports-of-entry.

What to Do If You Lose Your Passport While Traveling



Losing a passport while traveling can feel terrifying. You might envision yourself stranded at the airport or stuck in a country you'd rather leave. Panic could easily set in. That is why it is a good idea to be somewhat prepared for the possibility before you set out on any journey abroad. Fortunately, once the shock of losing your passport wears off, you will only need to follow a few steps to remedy the situation and resume your travels. Here's what to do.

1. Report your passport missing or stolen.

The first thing to do when you realize that your passport is gone is alert the U.S. State Department's Bureau of Consular Affairs. You can do this by filing [Form DS-64](#) online or calling (877) 487-2778 (you will still have to fill out the form later). You can also fill out the form at the nearest U.S. embassy or consulate (more on that below). It is recommended that you also file a police report with local law enforcement authorities in your location if you are a victim of theft.

2. Schedule an appointment to apply for a replacement passport.

Next, make an appointment at a nearby U.S. embassy or consulate to apply for an emergency passport (if you are traveling soon) or a regular passport (if you have got several weeks to spare). Check out the U.S. State Department website for an interactive map – <https://travel.state.gov/content/passports/en/country.html> – that offers locations and contact information for U.S. embassies and consulates in countries around the world.

If you are traveling somewhere that does not have a U.S. embassy or consulate for diplomatic reasons, then you will need to get to an embassy of another country that offers “protecting power” – [Switzerland](#) provides this to the U.S. in Iran, for example.

3. Get a new passport photo.

You will need to bring a new two-inch by two-inch passport photo of yourself to the embassy or consulate appointment. Check the U.S. State Department website (<https://travel.state.gov/content/passports/en/passports/photos.html>) to learn about additional photo requirements – no glasses allowed, for example.

4. Gather other necessary materials.

Along with your photo, you will have to bring a few other supporting documents to your appointment:

- Identification (a driver's license or state ID card, for example).
- Details of your travel itinerary, including flights and lodging.
- Evidence of U.S. citizenship, such as a photocopy of your missing passport.

If you cannot provide a photocopy of your passport, do not panic. According to the U.S. State Department (<https://travel.state.gov/content/passports/en/emergencies/lost-or-stolen-passports-abroad.html>), consular staff will still work with you to quickly replace your passport even if you are missing some of the documents. Still, do yourself a favor and email yourself copies before you travel abroad just in case.

5. Head to the U.S. embassy or consulate.

Keep in mind that you will have to go through a metal detector and have your personal items inspected by X-ray equipment before entering a U.S. embassy or consulate in any country. Also, certain items are not allowed in with you, including large bags, food and drinks, and any type of recording equipment, including cell phones.

6. Submit official forms and fees.

If you have not already submitted a Form DS-64 online, then you will need to do so at the embassy or consulate during your appointment. Also, you will have to fill out a DS-11 passport application and explain how your passport went missing or got stolen in a sworn statement. Unfortunately, the passport replacement process is pricey: [\\$110](#) for a passport, [\\$30](#) for a passport card, or [\\$140](#) for both, plus an extra [\\$60](#) for expedited service.

7. Get a new regular passport.

Emergency passports are only valid for a year, so you will have to exchange yours for a regular passport once you are back in the U.S. – but there is no fee involved.



MONEY – CONSUMER PROTECTION

Guard Your Social Security Number



Be smart about sharing and protect your privacy.

The last four digits of your Social Security number are especially important. Be sure to protect them well.

By obtaining your Social Security number, identity thieves have the easiest path to the

greatest damage: stealing your money and government benefits. Getting medical care and other services in your name. Leaving a terrific tangle for the real you to clear up.

And what then? You can apply for a new “Social,” but few do so successfully. In 2016, when 15 million people were [victimized by identity theft](#), about 400 new numbers were issued, says Social Security Administration spokeswoman Dorothy Clark. Getting a new number is a laborious and often futile process in which economic hardship must be proven. And getting a new Social creates more hassles as your original number continues to follow you through life. So, your best defense is to protect those nine digits. Here’s how.

- **Leave it Home.** Never carry your [Social Security card](#) — what if your wallet or purse is stolen? The same goes for your Medicare card (which includes your Social), unless you are seeing a health care provider for the first time. If you like the security of having an ID on you, carry a photocopy of your Medicare card with several digits blanked out.
- **When Asked, Don't Tell.** Only a few organizations have a legal right to your Social – your employer, banks and lenders, investment funds, the IRS and government-funded programs

such as workers' compensation. When asked by others, just say no. The more your number is out there, the greater the risk of identity theft.

- **Guard the Final Four.** Although most widely used and shared, the last four digits are in fact the most important to protect. These are truly random and unique; the first five numbers represent when and where your Social Security card was issued. Scammers can get those numbers by knowing your birth date and hometown. So, do not use the last four as a PIN. Do not share them in emails. Ask companies to use an alternative identifier.
- **Freeze 'em Out.** If you place a security freeze on your file at the big three credit rating agencies, ID thieves who have your number cannot get loans in your name, because lenders cannot do the required credit check. To place a freeze, you need to contact each of the three major credit bureaus: Equifax (equifax.com; 800-349-9960), Experian (experian.com; 888-397-3742) and TransUnion (transunion.com; 888-909-8872). Freezes can be "thawed" as needed, such as when you are switching insurance providers.
- **Report Quickly.** If your number is used for identity theft, contact the Federal Trade Commission at 877-438-4338 or at identitytheft.gov. File a police report and notify credit-reporting bureaus and banks. Report Medicare fraud to 800-447-8477, and if you suspect crooks are going for your tax refund, call the IRS at 800-908-4490. For lost or stolen Social Security cards, call the agency at 800-772-1213, or go to socialsecurity.gov/ssnumber.



Sid Kirchheimer

About the Author

Mr. Kirchheimer is a money market expert from AAR Bulletin specializing in scam alerts as well as consumer advocates.

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RETIREMENT – SOCIAL SECURITY

Social Security Payments to Increase Two Percent Next Year



It's the biggest boost since 2012 — but not nearly enough to keep up with rising costs.

A 2 percent cost-of-living adjustment for Social Security recipients is coming in 2018, but it doesn't keep pace with rising costs.

Social Security recipients will be getting a 2 percent cost-of-living adjustment (COLA) in 2018, the biggest increase since 2012. But it won't be enough to keep pace with the rising costs affecting millions of older consumers who depend on the monthly benefit as their prime source of retirement income.

The COLA, announced Friday, October 13, 2017, by the Social Security Administration (SSA), will boost the average beneficiary check by \$27.38 a month, or about \$329 a year. The increase is the largest since a 3.6 percent hike in 2012. The adjustment was a minuscule 0.3 percent increase in 2017, and there was no change in 2016.

AARP CEO Jo Ann Jenkins said the 2018 COLA will provide recipients some financial relief, but not enough to offset the higher costs eroding older consumers' purchasing power.

"For the tens of millions of families who depend on Social Security for all or most of their retirement income, this cost of living increase may not adequately cover expenses that rise faster than inflation, including prescription drug, utility, and housing costs," Jenkins said.

Indeed, while overall inflation remains relatively tame, those on fixed incomes and struggling to make ends meet are feeling an economic pinch. Average consumer electricity bills are up about 3.5 percent over 2016, and prescription drug prices are climbing at an even faster clip.

The 2018 COLA could be crimped by higher Medicare Part B premiums. The standard premium is now about \$134 a month, but many participants pay about \$109 a month if they have the fee deducted from monthly benefit payments. A "hold harmless" provision in federal law prohibits Medicare from raising a person's Part B premiums if it reduces their Social Security benefits. For the past two years, most Medicare beneficiaries have been held harmless because, without a significant COLA, increasing their premiums would have resulted in lower Social Security benefits.

In 2018, the COLA will be large enough to allow for the increase in premiums. Medicare costs have grown very slowly in the past few years. The increase in premiums that some beneficiaries will see next year is an unfortunate side effect of not having a substantial Social Security COLA recently. Medicare Part B premium prices are expected to be announced next month.

"For many beneficiaries, even this small adjustment will be wiped out by increases in Medicare premiums and other health care costs," said Nancy Altman, president of Social Security Works, a nonprofit advocacy group. "It's long past time for Congress to update the formula used to calculate the yearly COLAs so that it reflects the real expenses that seniors and Americans with disabilities face every day."

The SSA also announced that the maximum amount of earnings subject to Social Security tax, now \$127,200, would climb to \$128,700 next year.

This year, 42 million retirees are receiving Social Security payments averaging \$1,377 a month, or about \$16,524 a year. With the 2018 COLA, payments will average \$1,404 a month, or \$16,848 a year.

In its 2017 annual report, Social Security trustees again warned that without changes, the Social Security trust fund would be depleted by 2034.

Jenkins says AARP will keep pressing for solutions. "AARP continues our advocacy for bipartisan solutions to help ensure the long-term solvency of the program, as well as adequate benefits for recipients," Jenkins said.

AARP's Social Security Calculator can help people figure out when they should claim Social Security. For more details, go to www.aarp.org/socialsecurity.



FAMILY LAW

How to Change a Child's Last Name



When a parent leaves a child's life, that parent can leave a surname behind. This can happen after the parents break up or divorce, or when a parent abandons a child. After the departure, the custodial parent may want to change the child's surname.

A child's surname change requires court action. Here is how it is done in California.

- **If both parents consent.** If both parents consent to the name change, the court will grant the name change petition. (See Code Civ. Proc., § 1278.5.) This is the easiest scenario.
- **If one parent refuses.** If both parents are alive and do not both consent, the court will decide according to the child's best interests. (*Marriage of Douglass* (1988) 205 Cal.App.3d 1046, 1054; see Code Civ. Proc., § 1278.5.)

Here are some of the factors that a court might consider in determining whether a name change is in a child's best interests (*Marriage of Schiffman* (1980) 28 Cal.3d 640, 647):

- (1) the length of time that the child has used a particular name;
- (2) the nature of the child's relationships with his or her respective parents;
- (3) the effect of any proposed name on those relationships; and
- (4) the child's need to identify with a particular family unit through the use of a common name.

Although the court is not necessarily bound by a preexisting agreement of the parents, it could be influenced by one. That is when it is useful to think ahead: If you anticipate that a surname change may become an issue after a divorce, you should address it in the marital settlement agreement. Here is sample language you might use to guide the judge:

"The surname of the minor child(ren) of the parties will [\[continue to/henceforth\]](#) be [\[surname\]](#).

[Add if appropriate]

Neither party shall seek to change the minor child(ren)'s surname [\[or given name\(s\)\]](#), whether formally (through a petition for a name change) or on a de facto basis, without the prior written consent of the other party or a court order."

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PRE-TRIAL EXPERT WITNESS

Do You Need an Expert Witness, and If So, What Type?



Retaining an expert witness is expensive and may not be necessary in every case. Do not try to keep up with the Jones & Jones firm: Just because the other side has an expert or because experts have traditionally been used in similar cases doesn't mean you need one. And if you decide you do need an expert, make sure it is the best type for your case.

A handy way to help decide whether an expert is needed is to analyze the pertinent jury instructions. Try to determine the respective burdens of proof as required by CACI 200—once the elements of each party's burden are succinctly stated, it is generally apparent whether one or more of those elements “is sufficiently beyond common experience that the opinion of an expert would assist the trier of fact.” (Evid. Code, § 801(a).)

Campbell v. General Motors Corp. (1982) 32 Cal.3d 112, 124 provides a helpful example: The appellate court held that the jury, without expert testimony, can decide whether a bus was defectively designed because it lacked any grip within reach of the plaintiff's seat, from which she fell when the bus turned. In so holding, the appellate court reversed a nonsuit that had been entered in the bus manufacturer's favor because of plaintiff's failure to call a design expert. *Campbell* teaches a twofold lesson:

1. Counsel should not automatically hire an expert just because technical matters are involved;
and
2. In borderline situations, the savings produced by not calling an expert are often offset by the expense and delay of a protracted appeal.

When there are matters beyond common experience and you decide to bring an expert on board, make sure to give serious consideration to the exact kind of expert or type of expertise that you need.

Here is an example: You represent a plaintiff who has suffered greater injuries than are usually encountered in a relatively low-speed, rear-end car accident when the seat back or head restraint fails. You need to find an expert who can account for the enhanced injuries. At first, it might seem that using a doctor who specializes in the injury suffered would be enough. But to bring a products liability case against the car manufacturer, you will need expertise not just in the diagnosis and treatment of back and neck injuries, but also in the causative mechanisms that can produce more extensive injuries. Most orthopedists and neurologists will not have the engineering background to offer expert testimony on that causative link, just as most engineers lack medical training. To bridge this interdisciplinary gap, consider retaining a biomechanic, who has the requisite skills and training to offer expert opinion on the effects of various physical forces on the human anatomy.

A few hours spent in case analysis, discussion with practitioners experienced in the area, and background reading to pinpoint the exact kind of expertise required, can save countless dollars, wasted hours, and untold grief later in the proceedings. And on the flip side, failure to retain the right kind of expert creates the risk of a nonsuit for not

establishing a prima facie case at trial, and possibly even a legal malpractice action for breach of duty to retain a particular type of expert.

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EMPLOYMENT LAW

Does an Employer Have to Give Severance Pay?



The short answer is “No.” But this may not be the smart answer. Although there is no legal requirement to provide departing employees with severance pay, employers should always consider doing so in exchange for a general release of claims the employee may have against the employer.

Giving severance pay when the employment relationship ends in exchange for a release obviously makes good business sense when the employer believes that the termination of an employee creates an increased risk of litigation. But there are differing views on giving severance when there’s no threat of litigation: Some see no reason to offer severance when there is no threat, while others see it as a reward for the employee’s contribution to the business and a way to help with the transition to a new job. Regardless of the reason for it, anytime an employer pays severance it should get a release in exchange.

A release will only be enforceable if it is part of a valid contract and follows various legal requirements:

1. **Basic requirements for standard waiver.** Under both federal and state law, a waiver of rights must be knowing and voluntary. Because a general release can’t waive claims unknown to the employee when it’s signed that would materially affect the consent, the release must show a specific intent to waive claims that the employee doesn’t know or suspect to exist in his or her favor.
2. **Requirements for waiver by employees age 40 and over.** The Older Workers Benefit Protection Act of 1990 (OWBPA) (Pub. L. 101–433, 104 Stat. 978), amending the Age Discrimination in Employment Act of 1967 (ADEA) (29 USC §§ 621–634), sets out specific requirements for enforceable releases of ADEA claims. (29 USC § 626(f).) A waiver and release of such claims under the OWBPA must be knowing and voluntary and cannot be considered “knowing and voluntary” unless, *at a minimum*, it complies with the requirements in 29 USC § 626(f)(1).
3. **Waiver for group reduction in force.** Special rules apply when the waiver is requested from an employee age 40 or over “in connection with an exit incentive or other employment termination program offered to a group or class of employees.” (29 USC § 626(f)(1).)

And keep in mind that some claims cannot be waived, such as the right to file a charge or participate in an investigation or proceeding conducted by the Equal Employment Opportunity Commission (EEOC) (29 USC § 626(f)(4)), claims for wages indisputably due (Lab. Code, § 206.5), and claims for state unemployment benefits. (Un. Ins. Code, § 1342).)

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FILE MANAGEMENT SYSTEM

How to Organize Paperless Client Files

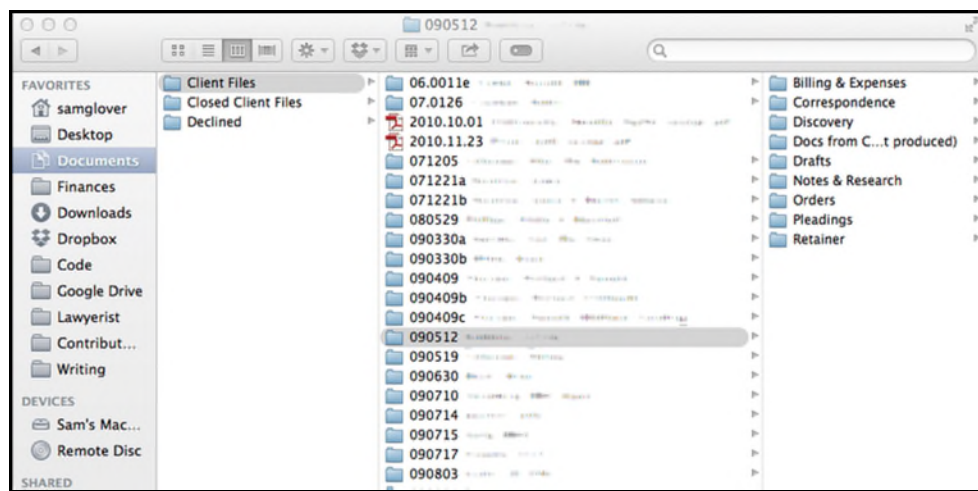


Organizing **paperless** client files is simple: organize digital client files exactly how you organized your files **before you went paperless**. Go with the “folder” analogy that your computer uses for organizing files, and use them just as you use your red ropes and manila folders.

Consider your “paper-full” workflow. You probably get a document in the mail, review it, then two-hole-punch it and add it to a manila folder, which is put in a red rope “bucket file” and stored in your filing cabinet (or in a stack next to your desk). A paperless workflow is similar, but most of it happens on your computer. After you get a document in the mail, scan it and file it in a folder on your computer. That folder is similar to the manila folder, and it should be located within a folder for the client (the red rope) that is, in turn, stored in a *Client Files* folder (your filing cabinet).

1. Client Files Folder Structure

Here is an overview of how I organize my client files:



This is a screen capture from my actual client files archive, so I’ve blurred out the names of my clients, but you get the idea.

Instead of a filing cabinet, I have a folder called *Client Files*. Inside that folder are sub-folders (red ropes) for all of my client files. Each matter has the file number and client’s last name. You can use your */Client Files* folder as a “tickler” for work planning meetings if you are reasonably diligent about closing files.

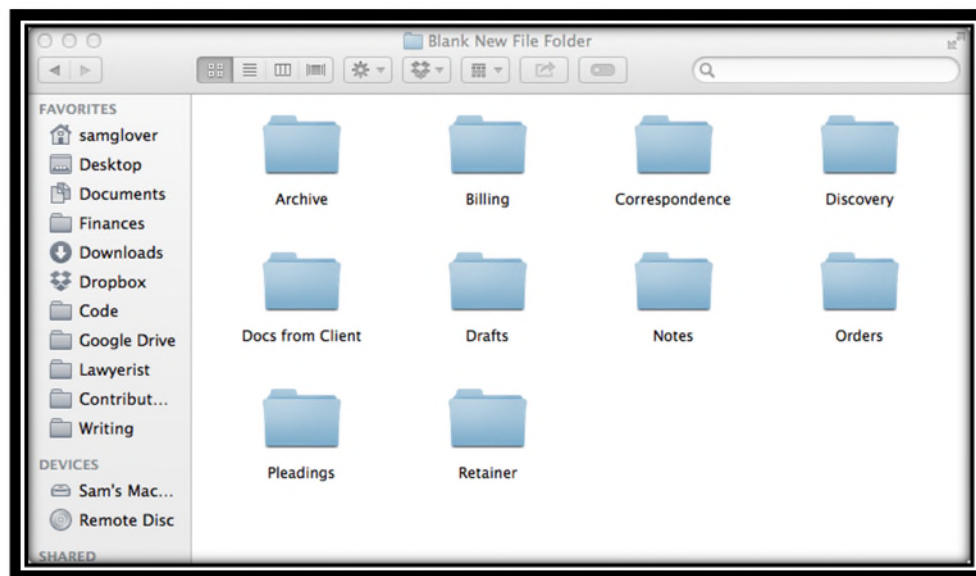
Within my */Documents* folder, I also have folders labeled *Billing*, *Temporary*, *Closed Client Files*, and *Declined*. (The *Billing* and *Temporary* folders are not shown in the image above, because it comes from my archive.) Here’s how I use each folder.

- *Client Files*. These are open files. I use a file closing checklist to close files promptly when they are finished.
- *Billing*. Files that have been closed, but for which the client still owes me money.
- *Temporary*. Any notes, intake forms, or other documents related to clients who have not yet signed a retainer.
- *Closed Client Files*. Self-explanatory, except for one important point. I return all paper to the client, together with a CD containing a complete copy of their digital file. I keep my digital copy for 10 years, then delete it (the client receives notice that this will happen in the closing letter).
- *Declined*. Files get moved here from the *Temporary* folder when the client decides not to sign a retainer, or when I decide not to represent the client.

I also have a *Client Files Archive* folder in my *Documents* folder with a folder for each year. At the end of each year, I move all the inactive (closed and declined) files into an archive folder for that year. It helps keep my *Client Files* folder uncluttered and makes it easy to delete archived client files on a ten-year schedule.

2. Blank New Folder Template

I keep a blank new folder template handy for new files. Here is what it looks like:



It makes sense to stick your templates in your blank folder, as well. Put your letterhead and envelope templates in your *Drafts* folder, and a settlement negotiations spreadsheet in your *Notes* folder.

3. File Numbers

If you do not already have a file numbering scheme, try mine. I decided it was worthless to assign arbitrary numbers, and started using numbers that reflected the date the client signed a retainer. So, if the client signed a retainer on August 3, 2016, the file number would be *160803*. If multiple clients sign a retainer on the same day, just add a letter, like so: *160803a* for the first, *160803b* for the second, and so on. This makes it easy to tell, at a glance, how long a file has been open. That's not information I need all the time, but it is more useful than consecutive numbering that says nothing at all about the file.

4. File Naming

File naming is also important. Generally, you would sort documents by the date of the document (*not* the date you scanned the document, which may be days—or years—later). To do this, start filenames with the date, year first: *yyyy-mm-dd Filename.pdf*. (You have to start with the year, or all your Januarys will end up next to one

another. I prefer to separate the elements of the date with hyphens to make it easier to read the date when looking at a list of files.

One last thing. Do not store Word, WordPerfect, Pages, OpenOffice.org, etc., files in any folders other than *Drafts* or *Notes*. Those files are not copies of documents. They are malleable drafts that probably look slightly different on different computers, and can be easily edited. PDFs are documents (and PDF is the file format you should use).

The exception is when a client provides you with a digital document. In that case, store it in the format in which you received it in the *Docs from Client* folder, since that digital file is the actual document you were given.

Originally published on October 20, 2019; updated November 25, 2013; republished on May 22, 2017; and updated on June 29, 2017.



Sam Glover

About the Author

Sam is the founder and Editor in Chief of Lawyerist.com, the best place for lawyers to learn how to start, manage, and grow a law practice, and home to the community of innovative lawyers building the future of law.



Best Practices for File Naming: Keeping Track of Legal Documents

The following article, authored by [Lindsey Dean](#), of One Legal LLC appeared in the October 19, 2017 blog of [General, Quick skills](#). I am sharing this with you as I find it very useful and handy.



You have just created an important document and need to save it where it can be easily found and reviewed. You want it to be grouped with other documents in the case, yet easily identifiable as its own file. How should you name your documents to keep things organized and accessible before, after, and during the case?

Best Practices for File Naming

When developing a file naming convention for your law firm, here are some best practices to follow for optimal organization and accessibility.

1. Establish a Clear Organizational Structure

How will you group documents? Some firms may find it easiest to break up cases according to the attorney of record for each. Others prefer to organize files according to the client name, or specific case name. [Lawyerist](#) has a good article on this subject.

Depending on the number of documents for each client and case, you may want to add additional folders to segment client correspondence, court filings, witness interviews, and other types of documents together.

Keep the native file (created originally in Word, Excel, etc.) in a separate draft or notes section, and the final PDF in the actual documents folder. Remember that Word or other word processing files *are not documents*, but drafts.

2. Order Chronologically

Keep track of *when* the document was created for a clear order of priority and to see the documents all nicely ordered according to the creation date. This can help you track the progression of the case as well as easily find documents.

It is best to use four digits for the year and two digits each for the month and the day. Then the files will be automatically ordered according to the date of creation, and the confusion over which number refers to which unit of time is minimal: 2017-10-16.

3. Use a Separator Character

A dash is perhaps the best separator character to give space between key numbers and other document descriptors. While you can choose to use spaces instead, separator characters make it easier for [computer resource locators](#) to organize and track your documents.

4. Include Document Type

Was that document the pleading? Or was that one the letter? Include an abbreviation of the document type to keep track of the various related documents when filing, serving, or sharing. Stay consistent in your choice of abbreviations, choosing either LTR or LETTER, and using the same version every time, both in your own work and across the firm.

5. Describe the Document

Perhaps you have multiple letters associated with this case, or are serving more than one party. After the SUM or LTR, briefly describe the contents of the document to avoid having to open each one every time you need to use it.

6. Stay within File Name Length

Both Microsoft and Apple computers impose limitations on file name length. This limit includes not just the file name itself, but the entire document path (i.e.: *C:\Documents\SmithvJones\Filing Docs\2016-05-21-COMP-case-initiation-doc-SENT-RH.PDF*).

The maximum count is:

- For Windows 7-10: 260 characters; and
- For Apple: 255 characters.

While these are the systems' limits, individual applications may have different character requirements. Even without the character limitations, remember that it's likely the entire file name won't show up every time, so put the most important information first.

7. What's the Status?

Has this document been sent or was it received? Has it been filed or not? If your document moves around a lot, and you want to keep track of where it has been, and what more needs to be done with it, it can be useful to change the name according to its status. SENT or RECEIVED can let other users know what is happening.

8. Initial It

When you have multiple people working with the same documents, it can be useful to see who has ownership of which files. Add initials to the very ends of your documents if you want it to be clear who is handling each.

9. eFiling and File Naming

When physical filing was the standard, the court never would have seen the name of a digital document. Now that eFiling is entering more and more courts, file naming matters for the court, too. A document that is simply called Simmons Pleading might work well enough for a time in your internal systems, but when it appears at the court level, it will benefit you to include as much information as possible.

Summary: Develop a file naming system that works for your office, and include whatever information is most important for you. Then, be sure to stick to that system across the office for maximum collaboration.



I came across the following blog written by Mike Ritter, a comedian/writer/actor/lawyer ("contract attorney") – in that order, and I thought of sharing same with you for your reading enjoyment.

Document Review Projects are Not All Equal

Last week, I had the rare opportunity as a [contract attorney](#) to choose between two different document review projects that were offered to me by two of the major legal staffing agencies in Los Angeles. As a contract attorney, you can and often do go months without any document review jobs and then, suddenly, many contract law positions staff around the same time. So, if you ever find yourself in this position of deciding between two contract law jobs that are both for similar document review projects, here are a few things to consider:

• Contract Attorney Hourly Rate

[Pay rate](#) is obviously critical for everyone, especially since the rate for a contract attorney doing document review has gone down in recent years. Currently, in Los Angeles, the hourly billing rate seems to have settled anywhere from \$29 to \$40 an hour, but the majority are at around \$34/hour. At the current hourly billing rate of \$34/hour, for a 40-hour work week, your take home pay is usually around \$950. For the lower rate, contract law projects of \$30 an hour, your take home pay is closer to \$850. For most of us contract lawyers who are buried in [law school debt](#), this is not insignificant difference.

- **Is the Contract Work at the Firm or Legal Staffing Agency?**

Onsite v. Offsite: Both have their pros and cons. Working on-site (at the law firm) usually comes with the perk of less oversight from the staffing firm, nicer offices, better parking options, cafeterias, coffee machines (tiny perk). However, there are occasions where the firm's own coordinator is a frequent visitor, which keeps people on edge a bit. Also, there is that feeling of being a second-class citizen to the full-time attorneys who you walk by in the halls (as a former Big-Firm attorney, I am acutely aware of this feeling, but it could just be my imagination).

Offsite (at the legal staffing office) can offer the advantage of not having to deal with anyone at the firm which can also be beneficial. For example, some contract lawyers need flexibility: some have auditions or need to be home early to pick up their children. The staffing coordinator is way more likely to try to allow for this flexibility, since they are the [recruiter](#) that probably hired you and plan to have a long-term relationship with you. From experience, offsite jobs overall seem slightly less stressful. One major downside I experienced recently was no internet. This can happen on or offsite, mostly because the client firm requests it for [security reason](#). Most of us need to be checking our email, the news, etc., and it can be very difficult to be disconnected for the entire day. Sometimes, the firm will compromise and allow a single computer to be used for all document reviewers with internet capabilities. If you know in advance that one firm or staffing agency does not allow for internet, and you have another option on the table that allows internet, go with that one. Trust me you will be much [happier](#), unless the pay is significantly higher in the internet free black hole.

- **Deadline: Will There be Any Overtime?**

The time line: If the client firm is answering a subpoena, for example, and are on a tight deadline to respond, they may need the document reviews to work fast. This sometimes simply means that there is more oversight and more stress because the client wants the job done in a sometimes-unreasonable time frame. Or it can mean a much, much higher payday in the form of overtime.

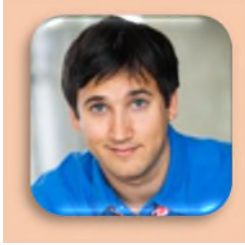
Overtime is the hidden gem of the contract staffing world – at least in California –California state law mandates that anything over 8 hours in a day is overtime, and pay is time and a half. Anything over 12 hours is double time. When a document review is running short on time, the firm often allows for overtime. Even if it is only a couple of days of overtime, it can make quite a difference. If the firm allows overtime for the last two days of a week for 3 extra hours a day (they rarely let contract attorneys get to double time), that is 6 hours times 50/hour = an extra \$300 on your paycheck. Most document reviewers I have met love to regale colleagues with tales of projects past where the overtime poured in.

- **Length of Project**

Finally, there is the question of will you miss out on a more lucrative project by taking the first one offered to you. There is always a bit of gaming to be done because nobody ever really knows when the next project will come in. Many legal staffing firms inform you about a project only days before the document review is set to begin. Sometimes, the document review falls through just as quickly for a variety of reasons: [Case settled](#), other legal staffing place got the job, the law firm decides it only needs two document reviewers instead of ten document reviewers.

If you take a project that is set to last a month, is that better than a project that is set to last three weeks. The answer is *not* always *yes*. When the three-week project ends, another much longer project could pop up, and if you are stuck on the other project, you get left out in the cold, while your colleague take the coveted spots on the new project. Since, there is not really a “right” answer because of all the uncertainty in the contract attorney world, my advice based on what I have seen is to follow the old saying “*one in the hand is worth two in the bush*.” Always take the “100% guaranteed to start tomorrow two-week document review” v. the “*we might have a big project starting next week, just sit tight until you hear from us*.”

Hopefully, some of this advice will come in handy if you find yourself in the position of deciding between two contract law jobs.



Matt Ritter

About the Author

Matt Ritter mostly takes on contract assignments and freelance legal jobs to support his creative ambitions. He has no idea where this journey is going to take him. Follow him on [Facebook](#) or [Twitter](#) to find out.



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

**SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION
CHAPTER ACHIEVEMENTS**

(Please submit this form each month.)

Month: November 2017

Your Name: _____ **Position held, if any:** _____

	Category - Description	
1.	ATTENDANCE - LSI Conference <i>(Circle all that apply)</i> Quarterly Annual	_____ _____
2.	BENEFITS - Belong through LSI sponsored <i>(Circle all that apply)</i> Credit Union Insurance Hertz Retirement Plans	_____ _____ _____ _____
3.	CALIFORNIA CERTIFIED LEGAL SECRETARY (CCLS) <i>(Circle all that apply)</i> 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 <i>(Circle all that apply)</i> 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 <i>(Check all that apply)</i>	_____ _____ _____
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

Would like to invite you to our 2017

Holiday Happy Hour!

Date: Thursday, December 7, 2017

Time: 600pm to 8:00pm

Place: Conference Center @201 California St, Ste.250

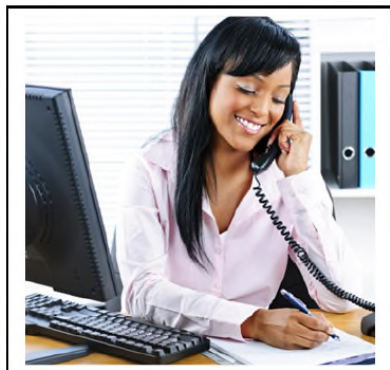
Cost: Members –Free

Non-members - \$10.00

RSVP: No later than Monday, December 4, 2018

*Come celebrate the holidays with us with music, drinks
and appetizers. It's going to be a great time!*

Cheers!



Legal Specialization Sections Lunch & Learn Webinar

THE VALUE OF LEGAL SECRETARIES IN THE MARKET TODAY

Presented By: Kate Hewitt, Robert Half Legal

December 7, 2017, 12-1 pm

ONLINE REGISTRATION AND PAYMENT AVAILABLE AT WWW.LSI.ORG

All Legal Specialization Section Members	LSI / Local Association Member	Non-LSI Member or Attorney
Free with Advanced Reservations \$5 After December 1, 2017	\$10 with Advanced Reservation \$15 After December 1, 2017	\$15 with Advanced Reservation \$20 After December 1, 2017
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Name: _____ E-mail: _____

Phone: _____ Local LSI Association: _____ (No abbreviations.)

CCLS Certificate Requested: ☐ Yes ☐ No

Payment: ☐ Check (made payable to LSI) ☐ Credit Card or PayPal Available at www.lsi.org

Questions for the Speaker: _____

Send completed form and payment (check made out to LSI) to:

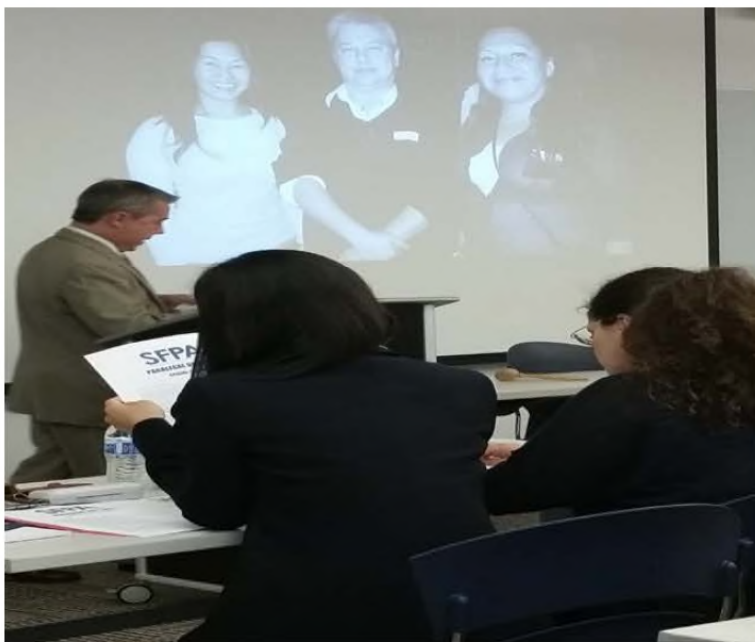
Renee M. Evans, CCLS, Webinar Section Leader, c/o Dentons US LLP, 4655 Executive Dr., Suite 700,
San Diego, CA 92121; Email: lsiwebinar@gmail.com

The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that this seminar has been approved for 1 hour of CCLS credit. There will be no CLE offered for this event.

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.



SAN FRANCISCO PARALEGAL ASSOCIATION



WILLS & ESTATES PRACTICE SECTION

Date:

Tuesday, 12/19/ 2017

Time:

12:00 P.M. – 1:00 P.M.

Location:

**San Francisco State University
Downtown Campus
835 Market Street, 6th Floor
San Francisco, California**

California Court System: An Insider's Perspective on How to Navigate the State Court System

(1 California MCLE general credit hour will be given.)

Speakers:

Larry McGrew and Larry Kirlin

With over 50 years of combined industry experience, Larry McGrew and Larry Kirlin will give you a better understanding of the overall court system from an insider's perspective. They will discuss shortcuts to help you get the information you need when interacting with the courts. A special focus will be placed on eFiling and the latest filing procedures you need to know. By the end of the presentation you will be armed with answers to the most frequently asked questions as well as ways to avoid the dreaded rejection!

Cost: No charge to SFPA Members / No charge to SFSU Students and Affiliates / \$25.00 to Non-Members

Please make reservations at www.SFPA.com.

Please contact *Dalia Liang Moore* at dalia.liang@gmail.com if you have any questions.

San Francisco Legal Professionals Association & San Francisco State Paralegal Program

Present a three-day Legal Professional Training Workshop

January 27, February 3 and February 10, 2018

Location: San Francisco State Downtown Campus
835 Market Street, San Francisco, CA 94103



This program is designed to provide training in many areas of law and is suitable for all levels of experience. Course materials are included in the registration fee.

TIME:

8:30 a.m.

SCHEDULE:

Saturday January 27, 2018, 8:30 am to 5:30

- Welcome Breakfast (Breakfast will be provided by Coblenz Patch Duffy & Bass LLP)
- Corporate Law / Tax Benefits
- Court Structure
- Intro to Litigation
- Litigation
- E-filing / Manual Filing

Saturday February 3, 2018, 8:30 am to 5:30

- Legal Ethics and Confidentiality
- Social Media and Confidentiality
- Electronic Discovery and Ethics and Confidentiality
- Discovery
- E-Discovery
- Litigation Class Panel

Saturday February 10, 2018, 8:30 am to 5:30

- Business Writing
- Calendaring/Docketing
- Corporations
- Test

EARLY REGISTRATION

Friday, December 15, 2017

DEADLINE:

REGISTRATION DEADLINE

Monday, January 15, 2018

EARLY REGISTRATION FEE: \$175 for SFLPA/LSI members
 \$200 for non-members
 Includes *LSI The Legal Secretary's Reference Guide*

REGISTRATION FEE \$210 for SFLPA/LSI members
AFTER DECEMBER 15, 2017 \$235 for non-members
 No Refunds After January 19, 2018

Include your check payable to "SFLPA" and mail to the following address:
 Francie Skaggs, c/o COBLENTZ PATCH DUFFY & BASS
 One Montgomery Street, Suite 3000, San Francisco, CA 94104

Name: _____

Address: _____

Phone Day: _____ **E-mail:** _____

Years of legal experience: _____ **Firm Name:** _____

Lunch will be provided.

MCLE Credits available. SFLPA, a local association of Legal Secretaries Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 10 hours of MCLE credit.

A test will be given on the last day and a certificate of completion will be awarded.

For all questions, please contact Francie Skaggs at
francieskaggs@gmail.com or (925) 212-4979



Alameda County Legal Secretaries Association
&
San Francisco Legal Professionals Association
Members of Legal Secretaries, Incorporated

Proudly Present:

ETHICS FOR EVERYONE

The Basics and Beyond

Saturday - January 13, 2018

10:00 a.m. to 3:15 p.m.

Get all four hours of Ethics or Pick and Choose what you need

Nixon Peabody
One Embarcadero Center, 18th Floor
San Francisco, CA 94111-3600

10:00 am -11:00 am Keeping the ENTIRE staff out of Hot Water!

11:15 am -12:15 pm Ethics and Electronic Networking

1:00 pm-2:00 pm Social Networking vs. Ethics and Professional
Responsibility

2:15 pm -3:15 pm Successful Time Management Strategies

INSTRUCTOR: DIANE MECCA

(Certified Paralegal Instructor at Abrams College)

COST:

Single Classes \$30 for members \$40 for non-members

All four classes \$80 members - \$100 non-members

Please RSVP to csauceda@meyersnave.com or lmcgrew@firstlegal.com

ACLSA and SFLPA, local associations of Legal Secretaries, Incorporated, an approved provider, certify that this activity has been approved for minimum continuing legal education credit by the State Bar of California and Certified Legal Secretary credit in the amount of at least 4 hours.



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

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

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LSI Members-Only Price.....\$164.50
Nonmembers Price.....\$235

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Legal Secretaries, Incorporated

LEGAL SPECIALIZATION SECTIONS

CIVIL LITIGATION

CRIMINAL LAW

FAMILY LAW

LAW OFFICE ADMINISTRATION

PROBATE/ESTATE PLANNING

TRANSACTIONAL LAW



ARE YOU A MEMBER OF THE LEGAL SPECIALIZATION SECTIONS?

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

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

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

LEGAL SPECIALIZATION SECTIONS

2017-2018 Membership Form

MAY 1, 2017 - APRIL 30, 2018

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

JOIN OR RENEW AT WWW.LSI.ORG

PAY VIA CREDIT CARD OR PAYPAL

SECTIONS

(circle which sections you are joining)

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

LSI Member Rates:

Individual Section: \$20

All Six Sections: \$75

Non-LSI Member Rates:

Individual Section: \$40

All Six Sections: \$150

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

Name: _____

Email Address: _____

LSI Member, Local Association/MAL: _____

Legal Specialty(ies): _____

Counties/Courts: _____

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

Dawn R. Forgeur, CCLS
LSS Coordinator

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

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



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

A Professional Association for Legal Secretaries and Other Law Office Professionals

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

Established 1936

Member Legal Secretaries, Incorporated,

A California Nonprofit Corporation

Established 1934

SFLPA Objectives

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

Membership Information

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

Membership Eligibility

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

Membership Benefits

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



San Francisco Legal Professionals Association ("SFLPA")

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

www.sflpa.org

APPLICATION FOR ACTIVE MEMBERSHIP

Please read the definition of an Active Membership given on the reverse side of this application. If you have any questions regarding your application for Active Membership, please ask your sponsor or any of the officers of this Association as listed on our website at www.sflpa.gov

Please fill out this application, sign it and submit it to your sponsor along with a check for \$55.00 made payable to SFLPA.¹ **This payment covers a one-time initiation fee and your first year² of annual membership dues for Legal Secretaries, Incorporated (LSI).**³ A copy of this completed form is your receipt for your annual dues. Upon becoming a member, this information will be included in the Membership Roster which is shared with current members only. You will receive a membership card for the current fiscal year by U.S. Mail.

PERSONAL:	BUSINESS:
NAME: _____	Your Title: _____
Hm Address: _____	Employer: _____
City ST Zip: _____	Address: _____
Hm Ph: _____ Cell: _____	City ST Zip: _____
Email: _____	Email: _____
[Note: Your contact information will not be distributed outside SFLPA or LSI without your consent.]	Wk Ph: _____ How long? _____
	Contact Preference: <input type="checkbox"/> Home <input type="checkbox"/> Business
SPONSORSHIP:	FORMER EMPLOYMENT
Sponsor's Name: _____	Former Employer: _____
How did you find out about SFLPA? _____	City, State: _____
_____	How long? _____
Why do you want to join SFLPA? _____	Total Experience: Legal _____ Litigation: _____
_____	Areas of Practice: _____
Have you ever been a member of this Association or any others in the past? If so, when? _____	_____
_____	Have you completed or are you currently enrolled in an SFLPA Civil Litigation course? <input type="checkbox"/> Yes <input type="checkbox"/> No

List at least one SFLPA-Sponsored function that you attended as your pre-requisite for membership and include date(s):	1. _____ Mo. _____ Yr: _____
	2. _____ Mo. _____ Yr: _____

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

(CONTINUED NEXT PAGE)

¹ Payment can also be made by U.S. mail to the post office box listed above or by using an app called Venmo
² For fiscal year beginning the previous May 1st through April 30. Applications accepted after March 1 will have dues pro-rated.
³ Accompanying membership in LSI, a California non-profit mutual benefit association, includes subscription to *The Legal Secretary* magazine published quarterly, discounted prices on LSI publications such as *The Legal Professional's Handbook* and *The Law Office Procedures Manual* and more. Visit <http://lsi.org/> for more details.

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

APPLICANT'S SIGNATURE: _____ **DATED:** _____

To be completed by an SFLPA Officer:

Approved by Board on: _____ Initials: _____ Initiation Date: _____

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

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

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



San Francisco Legal Professionals Association

MEMBERSHIP RENEWAL FORM

For The Fiscal Year of May 1st Through April 30th

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

Note: Your contact information above will not be distributed outside SFLPA without your consent.

Upon receipt of your complete application and your accompanying check, a current membership card will be sent to the address you listed above as your mailing preference. If you have any questions regarding your renewal of membership with the SFLPA, please contact any of the current officers listed on our website at www.sflpa.org. Thank you for your continued support as a member of the San Francisco Legal Professionals Association.



CHANGE OF ADDRESS FORM

Member Name _____

New Address _____ City _____ State _____ Zip _____

New Home Telephone

New Office Telephone

New Personal Email Address

New Work E-Mail Address

New Employer Name

New Address _____ City _____ State _____ Zip _____

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

YOUR SPECIALTY:

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

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

Please submit to:

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

Member Benefits

Advantages of Membership

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

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

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

MAKE A CAREER CHOICE – BECOME A LEGAL PROFESSIONAL

Why Become a Legal Professional?

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

Why Join Legal Secretaries, Incorporated?

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

How You Can Become a Legal Professional:

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

Discounts for LSI Members

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

LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

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

<p>*NEW BENEFIT: LEGALSHIELD/IDSHIELD Contact: Courtney Coats, Independent Associate (925) 580-6446; coats8@legalshieldassociate.com LegalShield offers legal, identity theft protection, along with a massive Perks Program where you will have significant savings to over 500 local and national companies.</p>	<p>QUESTIONS AND CONCERNS CONTACT: Heather Edwards, LSI Vice President LSI Marketing Committee Coordinator (818) 482-7040 heatheredwardslsi@aol.com</p>
<p>WORKING ADVANTAGE Toll Free: (800) 565-3712 www.workingadvantage.com Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more. Member ID: Contact LSI Corporate Office, info@lsi.org, or LSI Vice President</p>	<p>HERTZ CORPORATION Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 www.hertz.com</p>
<p>FINANCIAL PROVIDERS</p>	
<p>CAPITAL INVESTMENT ADVISERS Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 www.ciadvisers.com Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>	<p>LEGACY WEALTH MANAGEMENT Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: daniel@legacywealthmanagement.biz www.legacywealthmanagement.biz Offering discounted John Hancock Long Term Care Insurance & Life Insurance, Annuities, Retirement, Investment & Estate Planning, Mutual Funds, & 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 jory@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>
<p>CREDIT UNIONS</p>	
<p>LA FINANCIAL FEDERAL CREDIT UNION P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 www.lafinancial.org Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p>PROVIDENT CREDIT UNION 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 www.providentcu.org All LSI members are eligible to join.</p>

Revised 03/2017

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