



1936-2017

Vol. 81,  
Issue No. 4  
September 2017

# HEARSAY

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

A Monthly Publication of the  
San Francisco Legal Professionals Association

***Creating Connections – Building Bridges... Together***





## ***National Presence. Local Expertise.***

U.S. Legal Support proudly supports the San Francisco Legal Professionals Association and its mission to unite individuals employed in the legal field.

As one of the largest full service legal support companies in the nation, we provide local specialists with national resources. Contact us to learn more about our custom solutions.

**888.575.3376**

[careporting@uslegalsupport.com](mailto:careporting@uslegalsupport.com) | [www.uslegalsupport.com](http://www.uslegalsupport.com)

### **Geoff Cohen**

Director of Business Development  
415.259.8302  
[gcohen@uslegalsupport.com](mailto:gcohen@uslegalsupport.com)

### **Ryan Siegel**

Director of Business Development  
925.705.9031  
[rsiegel@uslegalsupport.com](mailto:rsiegel@uslegalsupport.com)

**USLEGAL  
SUPPORT**

**The Power of Commitment™**



**Over 45 offices serving you nationwide.**

Costa Mesa | Fresno | Los Angeles | Sacramento | San Diego | San Francisco | Sherman Oaks | Woodland Hills

**Court Reporting | Record Retrieval | Litigation & eDiscovery Services | Trial Services**

# RICOH

*Imagine. Change.*

## **Ricoh USA**

225 Bush Street Suite #250

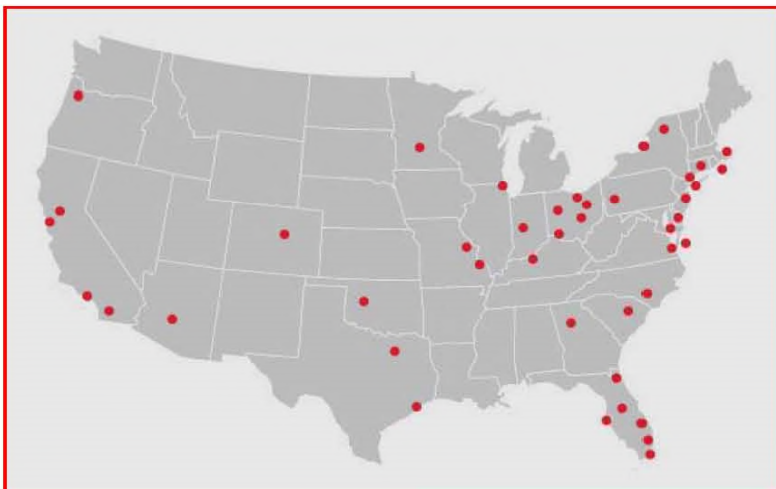
San Francisco, CA 94104

Office: 415.392.6850

Fax: 415.439.5887

## **Services & Locations**

- Document collections and hosting
- Scanning/Imaging and Copying Services
- Electronic and/or Document Numbering and Labeling
- OCR – Searchable Text Conversion
- Document Coding and Indexing
- Logical Document Determination / Unitization
- Color Imaging/Printing/Copying
- Large Format Copying and scanning
- Enlargements, Reductions, Mounting, Lamination, transparencies



## **Facts About RICOH**

- Availability 24 hours a day, 7 days a week
- Strict quality control measures and chain of custody procedures
- Free pick-up and delivery
- Largest production capacity in the industry
- Secure facilities
- Non-disclosure / confidentiality agreements signed by all employees
- Single point of contact for all your document production – locally or across the country
- Nationwide network of 46 offices

- Trial Exhibits
- CD and DVD Duplicating
- Image Conversion/Printing
- Electronic Data Discovery Processing and Consultation
- Bookmarking / Hyperlinking
- On-site Scanning Services
- Back File Scanning Services



CAROL FOSTER CONSULTING  
DIRECT HIRE • TEMP TO DIRECT HIRE • TEMPORARY

CAROL FOSTER CONSULTING

(415) 640-2607

CAROL@CAROLFOSTERCONSULTING.COM  
WWW.CAROLFOSTERCONSULTING.COM

## Court Reporters & Conference Rooms In Walnut Creek

- Conveniently Located
- Easy Freeway Access
- Free Parking

**(925) 932-5200**

**Professional Reporting Services**  
1600 South Main Street, Suite 125  
Walnut Creek, CA 94596  
Prs@PrsDepo.com | www.ProRepSvs.com



# FIRSTLEGAL

CONNECT. STRATEGIZE. SIMPLIFY. TRANSFORM.

**With First Legal, we have you covered from File Thru Trial and everywhere in between.**

**First Legal is here to simplify the litigation process for you!**

■ Court & Process ■ Investigations ■ Digital ■ Records ■ Depositions

**The First Legal team is ready to help!**

**Contact Sue Hammer, Account Executive at 415.626.3111 or  
by email at SHammer@firstlegal.com.**



**FILE thru TRIAL**

# SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION

P.O. Box 2582, San Francisco, California 94126-2582

[www.sflpa.org](http://www.sflpa.org)

## 2017-2018 OFFICERS AND CHAIRPERSONS

<b>PRESIDENT</b> <i>Larry McGrew</i> First Legal Network (415) 626-3111, ext. 1201 (Office) (415) 716-6585 (Cell) <a href="mailto:lmcgrew@firstlegallnetwork.com">lmcgrew@firstlegallnetwork.com</a>	<b>VICE PRESIDENT</b> <i>Carol E. Romo</i> Crowell & Moring LLP (415) 365-7471 <a href="mailto:cromo@crowell.com">cromo@crowell.com</a>	<b>SECRETARY</b> <i>Sally Mendez</i> Altshuler Berzon LLP (415) 421-7151 <a href="mailto:smendez@altber.com">smendez@altber.com</a>	<b>TREASURER</b> <i>Scheryl Warr</i> (415) 696-9382 <a href="mailto:Scheryl.warr86@gmail.com">Scheryl.warr86@gmail.com</a>
<b>GOVERNOR</b> <i>Christine J. Flores, CBA</i> Orrick Herrington & Sutcliffe (415) 773-5566 (510) 388-7918 <a href="mailto:CFlores@orrick.com">CFlores@orrick.com</a>	<b>WAYS AND MEANS</b> <i>Shannon Thompson</i> Behmke Reporting & Video Services (415) 597-3840 <a href="mailto:Shannon.thompson@behmke.com">Shannon.thompson@behmke.com</a>	<b>CCLS PROGRAM</b>	<b>LEGAL PROCEDURES</b> <i>Ryan Halog</i> (415) 912-7996 <a href="mailto:rhalog@hotmail.com">rhalog@hotmail.com</a>
<b>INTERCLUB</b> <i>Sue Hammer</i> First Legal Network (415) 626-3111, ext 1212 (Office) (415) 720-6229 (Cell) <a href="mailto:shammer@firstlegalsupport.com">shammer@firstlegalsupport.com</a>	<b>EMPLOYMENT</b> <i>Suddie Scott</i> Ogletree Deakins (415) 536-3415 <a href="mailto:sscott5204@yahoo.com">sscott5204@yahoo.com</a>	<b>EDUCATION</b> <i>Francie Skaggs</i> (925) 212-4979 (cell) <a href="mailto:francieskaggs@gmail.com">francieskaggs@gmail.com</a>	<b>HISTORIAN</b> <i>Christine J. Flores, CBA</i> Orrick Herrington & Sutcliffe (415) 773-5566 (510) 388-7918 <a href="mailto:CFlores@orrick.com">CFlores@orrick.com</a>
<b>PROGRAM</b> <i>Terralyn Graff</i> Barkley Court Reporters (415) 254-9935 <a href="mailto:terralyng@barkley.com">terralyng@barkley.com</a>	<b>HEARSAY EDITOR</b> <i>Sally Mendez</i> Altshuler Berzon LLP (415) 421-7151 <a href="mailto:smendez@altber.com">smendez@altber.com</a>	<b>PARLIAMENTARIAN</b> <i>May Sene</i> (415) 379-3692 <a href="mailto:mseneparalegal@gmail.com">mseneparalegal@gmail.com</a>	<b>PUBLIC RELATIONS</b>
<b>CHAPTER ACHIEVEMENT</b> <i>Christine J. Flores, CBA</i> Orrick Herrington & Sutcliffe (415) 773-5566 (510) 388-7918 <a href="mailto:CFlores@orrick.com">CFlores@orrick.com</a>	<b>MEMBERSHIP</b> <i>Carol E. Romo</i> Crowell & Moring LLP (415) 365-7471 <a href="mailto:cromo@crowell.com">cromo@crowell.com</a>  <i>Lillian Wong</i> <a href="mailto:lwong@jonesday.com">lwong@jonesday.com</a> 415-875-5884	<b>PROFESSIONAL LIAISON/DAY IN COURT</b> <i>Lilian Wong</i> Jones Day (415) 875-5884 <a href="mailto:lwong@jonesday.com">lwong@jonesday.com</a>	<b>SCHOLARSHIP/ CAREER PROMOTION</b>  <i>Aubrey Miller</i> Sommers & Schwartz (415) 955-0925 <a href="mailto:alm@sommersschwartz.com">alm@sommersschwartz.com</a>
<b>BAY AREA LEGAL FORUM (BALF)</b>  Website: <a href="http://www.bayarealegalforum.org">www.bayarealegalforum.org</a>  Member-at-Large <i>Yvonne Waldron-Robinson, CCLS</i> Cooley LLP (650) 843-5743 (408) 823-3205 <a href="mailto:ywaldronrobinson@cooley.com">ywaldronrobinson@cooley.com</a>  <b>SFLPA BALF Representatives</b>	<i>Malou Sana</i> <a href="mailto:malou.sana@bryancave.com">malou.sana@bryancave.com</a> 415-675-3431		<b>WEBSITE</b>  <i>Ryan Halog</i> (415) 912-7996 <a href="mailto:rhalog@hotmail.com">rhalog@hotmail.com</a>  <b>LSI CORPORATE OFFICE</b>  <b>(800) 281-2188</b> <b>Website:</b> <a href="http://www.lsi.org">www.lsi.org</a>



## **PATHWAYS PERSONNEL**

455 Market Street, Suite 1170

San Francisco, CA 94104

Phone: (415) 391-2060

Principal: Chris Crowley

Email: [ccrowley@pathwayspersonnel.com](mailto:ccrowley@pathwayspersonnel.com)

### Peninsula Office:

2000 Broadway,  
Redwood City, Ca 94063

Phone: 650-241-3874

Email:

[dcarmassi@pathwayspersonnel.com](mailto:dcarmassi@pathwayspersonnel.com)

**Refer with Confidence**

LRIS – the trusted source  
for legal referrals  
since 1946

**Serving San Francisco and Marin Counties**

**San Francisco-Marin Lawyer Referral  
and Information Service**

- State and nationally recognized as the model for legal referrals
- Personalized service from professional, multilingual staff
- Referrals to insured San Francisco and Marin County attorneys, vetted for experience
- Continuous oversight from the first phone call to the final settlement



San Francisco-Marin  
LAWYER REFERRAL AND  
INFORMATION SERVICE

THE BAR ASSOCIATION OF SAN FRANCISCO

**(415) 989-1616**

**[www.sfbar.org/lris](http://www.sfbar.org/lris)**



## TABLE OF CONTENTS

2017-2018 Officers and Chairpersons .....	5
President's Message .....	8
Vice President's Message .....	10
Legal Blog .....	13
Chapter Achievement .....	32
Upcoming Events .....	33
CCLS Examination Application Form .....	33
Legal Specialization.....	38
Membership Application.....	41
Membership Renewal Form.....	43
Change of Address Form .....	44
LSI Benefits .....	45
San Francisco Festivals and Events .....	47

## *Special Thanks To Our Advertisers:*

*Carol Foster Consulting  
First Legal  
Pathways Personnel  
Professional Reporting Services  
Ricoh USA  
U.S. Legal Support*



**FROM STALEMATE  
TO HANDSHAKE**



**ALTERNATIVE DISPUTE RESOLUTION**  
Arbitration, Mediation, Fee Dispute Services

**(415) 982-1600**  
[www.sfbar.org/adr](http://www.sfbar.org/adr)

The Bar Association of San Francisco

# President's Message

By: Larry McGrew



*Creating Connections – Building Bridges...Together!!*



## September 2017 President's Message

Greetings SFLPA Members & Friends,

Happy September!! I hope everyone had a relaxing and cool Labor Day Holiday. As we move into September, summer will officially end as fall will begin on Friday, September 22.. Typically the fall months usually bring the warmest temperatures to the Bay Area but I hope it will not be as hot as it was when San Francisco set a record for an all-time high of 106 degrees just recently.

With extreme weather comes devastation. Many have been impacted by the California wildfires and Hurricanes Harvey and Irma. It is times like these we need to be sure to do what we can to support the American Red Cross. In addition, it's a reminder that we all need to have a plan as well as supplies in the event we experience such a catastrophic event in the Bay Area. Visit the Red Cross website: [https://www.redcross.org/ns/apology/disaster\\_homepage.html](https://www.redcross.org/ns/apology/disaster_homepage.html)

If you can make a donation or volunteer your time to help those in need, please do so. Also, if you do not have an 'Emergency Preparedness' plan in place, you may want to consider learning more about how to implement a plan for you and your family.

Last month, Kevin Nichols provided us with a fantastic presentation on "Insuring Your Own Job Security" at our August Brown Bag event. It was a very well-attended event. The scope of the presentation was on personal branding through social media as well as the importance of continuous education and networking.

Our September Brown Bag is scheduled for Tuesday, September 26, 2017, and will cover "Everything you need to know about serving Subpoenas" by Tony Klein, a process server with over 40 years of experience. We hope that you can attend. Be sure to RSVP so that your name will be on the building security list.

Last week was our SFLPA Open House. Unfortunately, I was working in Los Angeles, but I heard it was a huge success. I would like to congratulate our Membership Committee which is led by our Veep, Carol Romo. The Committee consists of: Malou Sana, Lilian Wong and our hostess was Judy Nakaso as the event was held at the offices of Sheppard, Mullin, Richter & Hampton in Four Embarcadero Center. I would also like to thank Mary Beaudrow, CCLS, LSI Executive Advisor and LSI past-President for giving all the guests an overview of Legal Secretaries, Inc. I would also like to thank the members of our Board for their participation at the Open House so our guests came away with not just raffle prizes, but also an appreciation of what LSI and SFLPA have to offer your career advancement.

Our next Membership Meeting is scheduled for Tuesday, October 17, 2017. It will be hosted at the offices of Ogletree Deakins which is located at One Market Plaza, Suite 1300, San



Francisco, CA 94105. Our guest speaker is Michael Thomas, an Associate at Ogleetree, who will be speaking on the "Laws Impacting Diversity and Inclusion." This is a hot topic and we hope you can attend this dinner meeting.

Be update your calendar with these upcoming events. Also, coming in January or February of 2018, a multi-week Legal Secretarial Training Program that will focus on civil litigation. The program is still in development so we don't have any details to release at this time. We hope to begin registration in early to mid-November. So put this on your radar and stay tuned for more details.

Other programs/events that may be of interest to you:

#### LSI Conferences:

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

#### LSI Online Training Program:

- Overview of California State Court Discovery – A SixWeek Course starting on November 6 thru December 18, 2017. Registration deadline is November 3, 2017. For more info, please visit the LSI Website: [www.lsi.org](http://www.lsi.org) – click on 'Online Classes' tab.

Please "Save the Date" for some important future events:

- October 7, 2017 – Jersey Night Fundraiser
- October 26, 2017 – Halloween Bingo Fundraiser
- January 16, 2018 – General Membership Meeting
- March 20, 2018 – Elections Meeting
- October 10, 2017 – Day-in-Court Mock Trial
- December 7, 2017 – Holiday Party
- February 18, 2018 – Crab Feed Fundraiser
- April 28, 2018 – 82<sup>nd</sup> Officer Installation

Lastly, we are looking for a Marketing Chairperson. I would like to thank Anthony Tang for his assistance and guidance over the past year-and-a-half. Unfortunately, Anthony had to resign from this position due to other commitments, but he helped us tremendously and provided a fresh perspective to our Board. If you know of someone who works in the legal industry and would be a suitable fit for this position, please let me know.

If you have any suggestions or would like to provide us some feedback, please feel free to contact me at: [lmcgrew@firstlegal.com](mailto:lmcgrew@firstlegal.com). We welcome any and all feedback or suggestions to help us provide you with the resources you need to be successful.

Enjoy the rest of your month and we hope to see you at an upcoming event.

Respectfully,

Larry McGrew  
President 2017-2018

## *Vice President's Message*

By: Carol Romo

From the Veep . . .

I am proud to be a member!

During my 5 years as a member of the San Francisco Legal Professionals Association and Legal Secretaries Incorporated ("SFLPA" and "LSI," respectively) I have encountered a perception by many of the Legal Secretaries who are members that their law firm employers do not encourage or even take kindly to their membership or active participation in this organization. In some cases, these members have purposely kept their membership a secret from their employers, opting not to talk about the SFLPA with the attorneys they support or their Legal Administrators; even hiding flyers and other materials from the SFLPA or LSI away from the possible sight of prying eyes in their workstations. When I asked why, the replies were always the same: "Because our firm frowns upon having to take time off for anything other than medical appointments and such." Or "Because I would get in trouble for working on something other than what I am paid to work for at the firm."

First of all, I would like to address the perspective aspect of this situation. If you work at a firm that perceived that the San Francisco Legal Professionals Association or Legal Secretaries Incorporated is not employee related, they are obviously misinformed. It should be the responsibility of each member to make their employers aware of what the Association represents which is simplified by its motto: "Excellence through education." To belong to these organizations and actively partake in the variety of programs both consistently offer each year is to care about the quality of your work, your current knowledge of court rules and procedures, and keeping in step with technical advancement and other tech skills directly related to your work for the firm.

Case-in-Point: Three years ago, when state courts were feeling the worst budget cuts and court filing departments had drastic staff reductions. This made it more difficult to speak directly with the court staff who had less time to file documents with Superior Courts, etc. We were fortunate to have former Presiding San Francisco Superior Court Judge Richard Kramer who headed the Complex Litigation Department as our Special Guest Speaker for a presentation to our members, entitled "We're All In This Together." Those of us who attended still talk about his insightful, simulating and unforgettable speech that he designed specifically for legal secretaries and attorney support staff, to understand what court personnel were going through and how it was affecting their desire and ability to do the work at hand in a timely way. He helped us see what we as legal secretaries trying to get papers through the court system could do to help accomplish the tasks at hand that were otherwise being held up by a financially fragile court system. He explained his theories and advised on how to get business taken care of when you can't get through to a live person at the courthouse. There was discussion about the Court Rules for Proofs of Service and why we should not wait to file a POS even though Court Rules allow for delay in filing these required documents. We also learned how a paper moved from the filing clerk to the courthouse, often becoming a permanent fixture in a room stuffed with paper waiting to be processed. All of this information

gave me and the others a whole new perspective on what was needed in order to work efficiently with the courts that were in financial turmoil at the time (and still are, really). I took as much of what I had learned back to my office and shared it with my fellow secretaries. We all benefitted which in turn benefitted the attorneys and ultimately, for our clients..

But this is just one small example of the benefit of being an active member and participating in the events and programs this Association has to offer. Another simple example of the benefits of being a part of Legal Secretaries Incorporated probably rests on a shelf in what used to be your firm's great law library, but now reduced to the basic publication. You may very well still find a two-volume set that looks like other attorney procedural publications, you know, the big 3 ring voluminous books that come in volumes and are updated by somebody regularly. Chances are you will find a two volume text manual published, like the others, by the Rutter Group entitled "Legal Professionals Handbook." Well, for those of you who haven't noticed yet, the authors of that publication are none other than Legal Secretaries Incorporated. Yup! A publication dedicated to the standardization of processing paper through the California State and Federal Court systems, tabbed by Areas of Practice and easy-to-find instructions for just about anything that your attorneys and law firm expect you to do or know as legal secretaries. I use it often for a variety of things that I can't possibly remember by heart from one filing to the next. For example, when a verification is required and the standard wording for introductory paragraphs for Declarations, responsive written Discovery and, of course, rules and laws dictating calendaring and proofs of service. In fact, this book, written by legal secretaries -- for legal secretaries -- is often referred to by my attorneys who discover where to find this valuable resource once they see me using it at my desk.

So, to sum things up and the point I am trying to make is: no member should ever feel afraid or condemned for being a member of these organizations. And it's up to you to show the benefits to be had by you and the firm, but most importantly, the attorneys you support, if you take advantage of the resources and opportunities both the San Francisco Legal Professionals Association and Legal Secretaries Incorporated have to offer their members. This does not mean you should storm into your legal administrator's office stating that they are all wrong about your membership. Of course not! But as a legal secretary, you have the talent and skill required to change your firm's perception and especially to be proud of being a member of our professional organization, very much like changing an attorney's perception of how much more complex a seemingly "simple" task at hand really is.

The other somewhat related subject concerns membership dues and reimbursement thereof by your law firm employer. Again, from my own experience, I have found that membership dues are often reimbursable by our law firm employers and sometimes (as in my case), the legal administrator may not even be aware of this practice. The first year I started working at my current firm, I paid my membership dues out of my own pocket because the legal administrator, who knew I was an active member of this Association, never mentioned that this particular kind of membership qualified for firm reimbursement. It wasn't until the following year, when I was looking through our firm's Policy Manual for information on reimbursement for Associates that I happened to find a section of the Policy Manual in which there was a full page listing of organizations for which the firm did in fact reimburse membership dues. Low and behold, in plain text were the words "Legal Secretaries Incorporated" and "San Francisco Legal Secretary Association" (which has since been changed to "Professionals"). So now, I submit my reimbursement request electronically with a copy of my receipt for my dues and



voila! The cost for my dues are directly deposited to my bank account immediately thereafter. It turned out that my legal administrator never looked at this page either.

So, whether you work at a large firm or a small firm, and no matter what your administrator may or may not know on the subject, do what your expertise as a Legal Secretary is known for: look for the facts and introduce them using plenty of good reasons for your involvement as a member. Most of all, don't be ashamed to be a member of this outstanding organization that has been around a lot longer (86 years) than many of your own law firm employers. Your Association and its parent company were founded upon keeping your professional technical skill and legal knowledge in terms of court requirements above par or, as our motto simply states: "Excellence through Education."

ONE LAST NOTE: more brief than the last, the Membership Committee has been tirelessly working on our first Membership Drive Event called "OPEN HOUSE" which I explained in detail in last month's issue of the Hearsay. All I want to say for now is **PLEASE plan on coming and plan on bringing a legal secretary or other law firm support person with you as your guest to this special event.** I believe everyone will have a good time and many of you may learn from our presentations later in the evening things you may have not known about our Association and our parent company LSI. There will be wine, beer and other delicious refreshments to tide you over until dinner, and you and your guests may come and go as you please throughout this two hour after-work event (see flyer in this issue of the Hearsay). And don't forget **there is no charge or cost for attending.** So, please help make this membership drive event successful by showing up and bringing someone that you might like to walk over with or meet at future events and programs sponsored by the SFLPA or LSI. (Never thought of that reason for asking someone to join, now did you?)

Thanks so much for reading this.

Carol Romo

By: Ryan Halog

September 2017

## ***EMPLOYMENT LAW***

### **California Employees: Know the Law, Know Your Rights**



California and federal law provides numerous rights and protection to employees. The following is a list of many of the most important employee rights:

#### **1. Harassment, Discrimination, and Wrongful Termination**

Harassment discriminations and wrongful termination are all prohibited in the workplace if they are based on an employee's actual or perceived:

- Ancestry
- Age (40 and older)
- Color
- Disability
- Gender
- Gender identity or gender expression
- Marital status
- Medical condition (including cancer and genetic characteristics)
- Military or veteran status
- National origin
- Race
- Religion
- Sex (includes pregnancy)
- Sexual orientation.

#### **2. Leave**

Employees in California may be entitled to:

- Pregnancy and maternity leave
- Family and medical leave
- Paid sick leave (24 hours or 3 days in each year of employment)
- Military leave
- Time off to vote.

### **3. Nursing Mothers Accommodations**

Employers are required to provide reasonable, private space and time for mothers returning from maternity leave to express breast milk while at work.

### **4. Overtime Pay, Meal and Rest Breaks**

Most nonexempt employees (employees who are not managers and operate under supervision) are entitled to:

- Compensation for overtime hours (1.5 times the hourly rate for any hours over 40 worked in a week)
- Time-and-a-half for hours worked over 8 in a day
- Double time for hours worked over 12 in a day
- An unpaid 30-minute meal break for every 5 hours worked in a day
- A paid 10-minute rest break for every 4 hours worked in a day.

### **5. Pay Equality**

Employers are required to provide reasonable, private space and time for mothers returning from maternity leave to express breast milk while at work.

### **6. Safe Workplace**

Every employer must provide a place of employment that is safe and healthy for employees.

### **7. Workers' Compensation**

You have the right to certain benefits (workers' compensation) if you suffer a work-related physical or mental injury or illness. These benefits include:

- Medical care
- Temporary disability benefits
- Permanent disability benefits
- Death benefits (paid to dependents if the worker died from a work-related injury or illness.

### **8. Whistleblowers are Protected**

An employer may not retaliate against an employee for disclosing information if employee has reasonable cause to believe that the information discloses a violation of state or federal law.

Unfortunately, retaliation occurs. The law, however, prohibits employers from retaliating against an employee for making a complaint based on a good faith belief of harassment or discrimination.

---



## Unlimited Vacation?



[Some employers](#) have stopped giving exempt employees a specific amount of vacation each year and have instead adopted “unlimited vacation” policies. This sounds like great news for employees, but it may be better news for employers.

Although the specifics vary, “unlimited vacation” policies allow exempt employees to take as much vacation as they wish subject to the satisfactory management of their work load and deadlines, the approval of their managers, and the demands of the business.

This sounds like it would be a great deal for employees, who would supposedly get broad discretion to decide when to take vacation and how much vacation to take without the need to ensure a sufficient bank of accrued time. But whether an exempt employee recognizes any greater benefit under an unlimited vacation policy than under a traditional accrual-based policy will depend largely on the extent to which he/she can take time off when desired.

As Dana Wilkie explains in her article [Unlimited Vacation: Is It About Morale or the Bottom Line?](#), some employees don’t end up taking more time off than they would get at a company that offers limited vacation. She concludes that,

“[although] the concept of unlimited vacation sounds generous, in practice, some argue that it benefits a company’s bottom line more than it benefits the company’s employees.”

One big downside for employees is that they won’t get cashed out for unused accrued vacation when they leave the employer. Of course, for employers, this is a major plus of adopting an unlimited vacation policy—the employer avoids entirely the obligation to cash out unused vacation on termination because the employee has not actually accrued any vacation. Employers also avoid the administrative tasks associated with recording the accrual and use of vacation leave.

Employers have implemented unlimited vacation policies with varying levels of success. Some have backed away: Kickstarter [nixed its policy](#) and Tribune Publishing quickly [rescinded its policy](#) following employee concern.

But others have found success with it. In his [blog post on FastCompany](#), one CEO explains how his company’s switch to an unlimited vacation policy worked well and offered tips for other employers considering such policies.

Any employer considering an unlimited vacation policy should, at a minimum, consider how the policy will apply to otherwise unpaid leaves during which the employee has the right to use accrued vacation (see, e.g., 29 USC § 2612(d)(2) (Family Medical Leave Act); Govt. Code, § 12945.2(e) (California Family Rights Act); 2 Cal. Code Regs., § 11044(b)(2) (Pregnancy Disability Leave Law)) and explain in their policy any limits on the use of vacation during such leaves.

For more on vacation leave policies generally, turn to CEB's award-winning [Employee Leave Laws: Compliance and Litigation](#), ch. 3.

*Printed with permission from Julie Brooks, Esq. (August 7, 2017)  
© The Regents of the University of California, 2014. Unauthorized use and/or duplication of this material without  
express and written permission from this blog's author and/or owner is strictly prohibited.*

## Should Employers Use Progressive Discipline?



Employment in California is presumed to be terminable “at-will,” i.e., employees can be fired for any reason (unless it’s an illegal reason) without warning. (See Lab. Code, § 2922.) This often comes as a surprise to employees who expect to get notice before their employment is terminated. That some employers adopt progressive disciplinary policies may make it even more confusing.

A progressive disciplinary policy is based on incremental levels of discipline, such as the following:

- Discipline begins with an oral warning for the first infraction of a work rule or other misconduct;
- If the misconduct persists, it is followed by one or more written warnings; and
- It culminates in suspension (optional) or termination for subsequent infractions.

Progressive discipline is *typically* used to correct less serious forms of performance deficiencies or misconduct (e.g., absenteeism, performance deficiencies, tardiness, abusive language, horseplay, sleeping or loafing on the job, personal use of company equipment, and other less severe forms of performance deficiencies or misconduct). Employers should **not** use progressive discipline in instances of severe misconduct (e.g., when the employee has engaged in physical assault, theft, falsification of work records such as a résumé or time records, willful damage to property, or divulging company trade secrets or other confidential information).

Strict progressive discipline policies encourage “fairness”—it gives employees warning and notice and keeps discipline consistent. This makes it very appealing to employees, and it can also create jury appeal for employers.

But many lawyers suggest avoiding a rigid progressive discipline policy because (1) it is inconsistent with a truly “at-will” employment relationship, and (2) it creates too many litigation risks. Having a progressive discipline policy gives a terminated employee grounds for arguing that there was an implied-in-fact agreement that terminations could only be for good cause, which makes it harder for an employer to win on summary judgment.

The employer that adopts such a policy has established a standard for its own conduct. As a result, any failure to follow the policy could be viewed by a jury as improper or in bad faith. And the more detailed a policy is, the greater the risk that a mistake will be made while dealing with a disciplinary problem.

For those employers who still want to adopt a progressive discipline policy, here are some suggestions:

- Include an at-will disclaimer at the end of the progressive discipline policy that permits the employer to skip any step in the discipline process.
- Instead of making the policy widely available, put the policy in a management-level procedures manual, because this prevents the claim that the employee detrimentally relied on the policy while allowing the employer to legitimately claim that the procedures were instituted for the employer's benefit only.
- Require supervisors to document each step of the process and discuss each disciplinary step with the employee to be sure that the employee understands the basis for the discipline and the consequences of subsequent infractions.

Get guidance on all aspects of discipline and terminations in CEB's [Advising California Employers and Employees](#), ch. 17. On progressive discipline required for city employees, check out CEB's [The California Municipal Law Handbook](#), §§ 4.279-4.284.

*Printed with permission from Julie Brooks, Esq. (August 23, 2017)  
© The Regents of the University of California, 2014. Unauthorized use and/or duplication of this material without express and written permission from this blog's author and/or owner is strictly prohibited.*

## Exiting Gracefully: The Exit Interview



An exit interview can be an important tool for employers looking to minimize the risk of wrongful termination litigation.

An exit interview scheduled after notifying the employee of the termination decision – preferably with a termination letter [termination letter](#) – can be an important deterrent to a wrongful termination action. Allowing the employee to discuss the termination with a company representative removed from the situation can give the employee the satisfaction of being “heard” and thereby reduce the risk of a lawsuit.

Employers who conduct exit interviews should consider the following guidelines:

1. Have the interview conducted by someone other than the employee's immediate supervisor, preferably someone unconnected to the termination decision, such as a human resources representative.
2. The person conducting the interview should prepare for the meeting by reviewing the employee's personnel file, including all documents pertaining to the termination.
3. The person conducting the interview should describe the employee's benefits, e.g., COBRA, vested pension or IRC 401(k) benefits, severance pay.
4. The person conducting the interview should explain the type of reference that will be given.
5. If the employee has signed an agreement promising not to disclose confidential company information or otherwise unfairly compete with the company, remind him or her of continuing obligations; if there is no such agreement, and the employee has had access to proprietary information, prepare an appropriate agreement for signature by the employee.
6. Deliver the *final paycheck*, including payment for all *accrued unused vacation time*.



7. Give the individual an opportunity to *comment* on the *job*, the *company*, the *supervisor*, or the *termination*.
8. Avoid any remarks that could be construed as discriminatory, such as comments related to age, race, sex, national origin, or disability.
9. Conduct the interview in a polite, businesslike manner. *Avoid expressing any opinion about the termination.*
10. Document all matters discussed with the employee, including any comments or opinions expressed by the employee about the termination.
11. Avoid any action that might create the impression in other employees that the terminated employee was untrustworthy. For example, allow the employee to collect his/her personal belongings in private, *not under the gaze of a security guard or supervisor*. *Allow the employee to leave the place of employment unescorted.*
12. If you are using a separation agreement, explain its terms and give the employee a written copy. Explain the period for signing the agreement. If the employee is age 40 or older, make sure the agreement conforms to the requirements of the Older Workers Benefit Protection Act (OWBPA) (Pub. L. 101-433, 104 Stat. 978) – see separate article, below.

Excellent advice for the entire discipline and termination process is in CEB's [Advising California Employers and Employees](#), ch. 17. For an exit interview guide, check out [Drafting Employment Documents for California Employers](#), ch. 7.

*Printed with permission from Julie Brooks, Esq. (May 1, 2013)  
© The Regents of the University of California, 2014. Unauthorized use and/or duplication of this material without  
express and written permission from this blog's author and/or owner is strictly prohibited.*

---

## The Older Workers Benefit Protection Act

This amendment to the Age Discrimination in Employment Act (ADEA) prohibits discrimination in benefits – and protects employees who waive their right to sue.

The purposes of the Older Workers Benefit Protection Act (OWBPA) are to make it illegal for an employer to:

- use an employee's age as the basis for discrimination in benefits
- target older workers for their staff-cutting programs, and
- require older workers to waive their rights without observing certain safeguards.

### Benefits Protection

The OWBPA prohibits age discrimination in the provision of fringe benefits, such as life insurance, health insurance, disability benefits, pensions, and retirement benefits. However, employers are *allowed to reduce benefits to older workers when justified* by significant cost considerations. In most situations, employers must provide equal benefits to older and younger workers. For some types of benefits, however, employers can meet this nondiscrimination requirement by spending the same amount on the benefit provided to each group, even if older workers receive lesser benefits as a result. Employers are also allowed, in some circumstances, to provide lesser benefits to older workers if the older workers receive additional benefits (from the employer or the government) that make up the difference.

The *rules are different for different types of benefits, and they can get quite complicated*. You can find detailed information on the rules in the Compliance Manual compiled by the federal Equal Employment Opportunity Commission, at <http://eeoc.gov/policy/docs/benefits.html>.

## Waiver Rules

The OWBPA also requires employers to include certain language – and follow certain safeguards – when asking older employees to give up their right to sue the company. By signing a waiver – often called a **release** or **covenant not to sue** – an employee agrees not to take any legal action, such as an age discrimination lawsuit, against the employer. In return for signing the waiver, the employer gives the employee an incentive to leave voluntarily, such as a severance pay package that exceeds the company's standard policy.

This type of transaction was very popular in the early 1990s among large corporations that wanted to reduce their payroll costs. Because **older workers** who have been with a company for a long time **typically cost more in salary and benefits** than younger workers, most staff-cutting programs were directed at older workers. But cutting only older workers constitutes illegal age discrimination, so companies commonly induced the older workers to sign away their rights to sue their former employers. In colloquial parlance, these deals are **often** referred to as **“Golden Handshakes – as in Thank-You-Very-Much-for-Your-Hard-Years-of-Service-and-If-You-Retire-Right-Now-This-Grand-Bunch-of-Benefits-Will-Be-Yours.”** This cruel squeeze play is now somewhat limited.

Under the OWBPA, you must be given at least 21 days to decide whether to sign such a waiver that has been presented to you individually. If the waiver is presented to a group of employees, each of you must be given at least 45 days to decide whether or not to sign. In either case, you have seven days after agreeing to such a waiver to revoke your decision.

### Restrictions on Agreements Not to Sue

There are several other key restrictions the OWBPA places on agreements not to sue.

Your employer must make the waiver understandable to the average person eligible for the program in which the waiver is being used.

The waiver may not cover any rights or claims that you discover are available after you sign it, and it must specify that it covers your rights under the ADEA.

*Your employer must offer you something of value – over and above what is already owed to you – in exchange for your signature on the waiver.* [Emphasis added.]

Your employer must advise you, in writing, that you have the right to consult an attorney before you sign the waiver.

If the offer is being made to a group of employees (as part of an early retirement incentive program, for example), *your employer must inform you in writing how the class of employees is defined, the job titles and ages of all the individuals to whom the offer is being made, and the ages of all the employees in the same job classification or unit of the company to whom the offer is not being made.*

You must be given a reasonable time in which to decide on if to sign the waiver.

Employers are allowed no room to hedge on any one of these requirements; a waiver that does not comply with all the absolute requirements is the same as no waiver at all. The U.S. Supreme Court reaffirmed this in a case decision, holding that an employee who signed a deficient waiver could not only sue for age discrimination, but also did not have to return the severance pay she received from her former employer for signing the invalid waiver. (*Oubre v. Entergy Operations, Inc.* (1998) 522 U.S. 422.)

## Negotiating a Better Deal

The OWBPA gives additional legal protections if your employer offers you the opportunity to participate in a staff reduction program. The Act indirectly puts you in a position to negotiate the terms of your departure.

The fact that your employer has offered an incentive tells you that the company wants you gone and is worried that you might file a lawsuit for wrongful discharge. This means there is nothing preventing you from making a counteroffer.

For example, after taking a week or two to think, you might go back to your employer and agree to leave voluntarily if your severance pay is doubled. There is power in numbers, so this type of negotiating is even more likely to be effective if done on behalf of a group of employees who are considering the same offer.

As in all employment transactions, it is wise to advise your employer of your decision in writing and to keep a copy of that letter, along with copies of all documents given to you by your employer as part of the staff reduction program. If you refuse to accept such an offer and are later dismissed, you may be able to allege illegal age discrimination as a basis for challenging your dismissal.

## How to Take Action

If you believe that an employer has violated your rights under the Older Workers Benefit Protection Act, you can file a complaint with the EEOC just as you would against any other workplace discrimination. For more information and articles on workplace discrimination and harassment, please visit <http://www.nolo.com/legal-encyclopedia/workplace-rights>. Note, however, that money damages are limited to back pay – and an additional sum equal to your back-pay award for willful violations – plus attorneys’ fees and court costs.

If the EEOC does not resolve your complaint to your satisfaction, you may decide to pursue your complaint through a lawsuit. This additional avenue is *not available for state workers*, however.



## **IMMIGRATION LAW (UPDATE)**

### **In-Person Interviews Mandated for Employment-Based Green Card Application and Others**

By [Rebecca L. Sigmund](#)

*(a shareholder in the Greenville office of Ogletree Deakins)*

On August 25, 2017, the U.S. Citizenship and Immigration Services (USCIS) confirmed that, as part of President Trump’s “extreme vetting” directives, potential legal immigrant workers will be required to undergo in-person interviews with USCIS. The interview requirement will apply to anyone moving from an employment-based visa to lawful permanent residency. The new mandate will also require visa holders who are family members of refugees or individuals who receive asylum to undergo an in-person interview when they apply for provisional status—a stage that precedes permanent residency. USCIS announced that the interviews will be “phased-in” starting on October 1, 2017. There is not yet any additional guidance as to how long the phase-in period will be. It will also take time to determine the extent of the impact that these new interviews will have on overall processing times.

Interviews are already part of the immigration process, and, in the past, USCIS conducted them for all cases as standard policy. However, decades ago, USCIS started routinely waiving in-person interviews for employment-based cases at its field offices to avoid duplicating the efforts of USCIS Service Centers, which vetted the cases. Under the new policy, USCIS will not grant such waivers.



The added interview workload and field office training will certainly lengthen wait times for permanent resident applicants. Employers and employees should plan accordingly for these delays.



## ***FEE AGREEMENT***

### **2 Key Provisions for Your Fee Agreement**



In [The Contract that Binds: Your Fee Agreement](#), we noted that fee agreements should not be governed by simple boilerplate and formulaic thinking. This is true, but there are exceptions to this general advice: Here are two provisions that should be considered and likely added to every fee agreement you draft.

When you are part of a law firm, your fee agreement should make clear that it's the firm being retained, not you. Even if you're likely to perform most or all the work, this provision will support the firm's continuing representation of the client and the transferring of responsibilities to another attorney if you die, become disabled, leave the firm, or are otherwise unavailable to handle all or some part of a client matter. Of course, the client will retain the absolute power to discharge the firm at any time, with or without cause.

Here is sample language you might use for this provision (when applicable, the bracketed language at the end may clarify the situation and assure the client):

“RETENTION OF FIRM RATHER THAN PARTICULAR ATTORNEY. You are retaining the [name of law firm], not any particular attorney, and the attorney services to be provided will not necessarily be performed by any particular attorney. [It is anticipated, however, that the services will be performed principally by [insert name(s) of attorney(s)].]”

If you're being retained as counsel but may delegate performance of some of the services to other attorneys and legal professionals, you need to make that clear to the client at the outset. (See California State Bar Formal Opinion No. 2004-165 (if attorney anticipates delegating services to outside contract attorneys, issue should be addressed in fee agreement.) Under Cal. Rules of Prof. Cond., rule 2-200, the client must specifically consent in writing to an attorney's sharing part of a fee with another attorney who is not a partner or associate in the same law firm. An attorney who is “of counsel” to the firm is not considered a partner or associate (i.e., an employee) in the law firm. (See California State Bar Formal Opinion No. 1994-138.)

Here is sample language you might use for this provision:

“DELEGATION OF ATTORNEY AND PARALEGAL SERVICES. You agree that we may delegate to other attorneys and legal professionals, such as contract attorneys and contract paralegals, some of the attorney services to be provided to you. Such services will be billed to you at the same hourly rates that we bill our services, and any such delegation will not affect your obligation to pay attorney fees as provided for in this agreement.”

Do you find it helpful to have these sample provisions? Get many more of them, as well as complete sample agreements with commentary and guidance, in CEB's Fee Agreement Forms Manual. And check out CEB's program Attorney Fee Agreements, which offers effective techniques for avoiding fee disputes, including the use of the State Bar fee agreement forms, the drafting of fee agreements, and managing the client relationship.

*Printed with permission from Julie Brooks, Esq. (August 11, 2017)  
© The Regents of the University of California, 2014. Unauthorized use and/or duplication of this material without express and written permission from this blog's author and/or owner is strictly prohibited.*



## **TRIAL PRACTICE**

### **Letting Jurors Pass Around Exhibits**



Some trial exhibits can be quite interesting and the jurors may want a close look at them. But is it a good idea to pass your exhibits to the jurors?

As trial counsel, you can ask that your exhibit be passed to the jury after it's been received and marked in evidence. You can say something like this:

"Your Honor, may I [request that the clerk] hand that exhibit to the jury and request that they pass it down each row so that each juror can [read it/look at it more closely]?"

But before you decide to make that request, consider the following drawbacks to giving jurors a pass at exhibits:

- **Distracting.** Jurors may be distracted from the testimony that's being presented while they're passing and examining an exhibit.
- **Misleading.** If the exhibit is detailed or lengthy, jurors will gain little from the brief look they can get while it's passed, and the look they do get may be more misleading than helpful.
- **Damaging.** An exhibit of several parts can get shuffled, and a delicate exhibit may be damaged.
- **Minimizing.** If too many exhibits are passed, the impact of crucial exhibits is often minimized.

If you are going to pass an exhibit to jurors, first explain exactly what it shows: If an exhibit is simply passed, the jurors may overlook or misinterpret what you want them to see. Most exhibits should be explained/interpreted by a witness. The explanation can be brief (e.g., "this photograph shows the left front door, and here at the bottom you can see that the lower hinge was broken"), or it can be detailed and extensive.

Whether or not the jurors handled the exhibit during trial, they may want to take it into the jury deliberation room as they decide the case. Under Code Civ. Proc., § 612, jurors may take "all papers which have been received as evidence ... except depositions" and "any exhibits which the court may deem proper." The trial judge will usually permit all exhibits that have been received and marked in evidence to be sent to the jury room, except when there is a danger of misinterpretation, as with hospital records and X-ray films.

Counsel may ask the judge to send particular exhibits with the jury into their deliberation room. If you want to send an exhibit that wasn't formally received in evidence, such as a diagram or model used by a witness as an aid in testifying that would also help jurors to understand the evidence, argue that this is permitted by section 612 when it states that the jury may take with them "any exhibits which the court may deem proper."

For more on handling exhibits during trial, turn to CEB's [California Personal Injury Proof](#), ch. 8, and [California Trial Practice: Civil Procedure During Trial](#), ch. 13. And get an overview of personal injury trial practice, including handling exhibits and witnesses, in CEB's program [The Personal Injury Basics: Trial](#), available On Demand.

*Printed with permission from Julie Brooks, Esq. (August 9, 2017)  
© The Regents of the University of California, 2014. Unauthorized use and/or duplication of this material without express and written permission from this blog's author and/or owner is strictly prohibited.*



## ***NONPROFIT CORPORATION***

### **How to Form a Nonprofit Corporation: A 50 State Guide**

Learn how to form a tax-exempt 501(c)(3) nonprofit corporation in any state.

Forming a nonprofit corporation is much like creating a regular [corporation](#), except that nonprofits must take the extra steps of applying for tax-exempt status with the IRS and their state tax division. Here is what you need to do:

1. [Choose an available business name](#) that meets the requirements of state law.
2. File formal paperwork, usually called [articles of incorporation](#), and pay a small filing fee (typically under \$125).
3. Apply for your [federal and state tax exemptions](#).
4. Create [corporate bylaws](#), which set out the operating rules for your nonprofit corporation.
5. [Appoint the initial directors](#). (In some states, you must choose your initial directors before you file your articles, because you must list their names in the document.)
6. Hold the first meeting of the board of directors.
7. Obtain licenses and permits that may be required for your corporation.

#### **Choose a Business Name**

Before you form your nonprofit corporation, you need to decide on a name that complies with the rules of your state's corporate filing office (see list below). Check your state's filing office website for your state's rules, but the following guidelines commonly apply:

- The name of your nonprofit cannot be the same as the name of another corporation on file with the state's corporations division.
- The name must end with a corporate designator, such as Corporation, Incorporated, Limited, or Corp., Inc., or Ltd. (This is required in only about half of the states.)
- The name cannot contain certain words prohibited by the state, such as Bank, Cooperative, Federal, National, United States, or Reserve.

In many states, you can check corporate name availability online by going to the state's filing office website. Or you can call your state's corporations division and ask whether your proposed name is available for your use. Often, for a small fee, you can reserve the name for a short period of time until you file your articles of incorporation.

#### **Check Your State's Corporations Division Website**

Your state's corporate filing division, usually part of the secretary or department of state's office, should have a website with nonprofit materials that will be immensely helpful to you in forming your nonprofit. You will most likely find sample or fill-in-the blank articles of incorporation, your state's nonprofit corporation laws, a filing fee schedule, and forms and instructions for checking the availability of your proposed business name.

In addition to confirming that another corporation in your state is not already using your proposed name, you must make sure your name will not violate a trademark owned by another company (in your state or out of state). To do this, you will need to conduct a trademark search. For information about trademark law and name conflicts, please visit [Your Business Name](#) area of Nolo's website.

Select your state to learn about your state's nonprofit corporation laws.

<a href="#">Alabama</a>	<a href="#">Georgia</a>	<a href="#">Massachusetts</a>	<a href="#">New Mexico</a>	<a href="#">South Dakota</a>
<a href="#">Alaska</a>	<a href="#">Hawaii</a>	<a href="#">Michigan</a>	<a href="#">New York</a>	<a href="#">Tennessee</a>
<a href="#">Arizona</a>	<a href="#">Idaho</a>	<a href="#">Minnesota</a>	<a href="#">North Carolina</a>	<a href="#">Texas</a>
<a href="#">Arkansas</a>	<a href="#">Illinois</a>	<a href="#">Mississippi</a>	<a href="#">North Dakota</a>	<a href="#">Utah</a>
<a href="#">California</a>	<a href="#">Indiana</a>	<a href="#">Missouri</a>	<a href="#">Ohio</a>	<a href="#">Vermont</a>
<a href="#">Colorado</a>	<a href="#">Iowa</a>	<a href="#">Montana</a>	<a href="#">Oklahoma</a>	<a href="#">Virginia</a>
<a href="#">Connecticut</a>	<a href="#">Kansas</a>	<a href="#">Nebraska</a>	<a href="#">Oregon</a>	<a href="#">Washington</a>
<a href="#">Delaware</a>	<a href="#">Kentucky</a>	<a href="#">Nevada</a>	<a href="#">Pennsylvania</a>	<a href="#">West Virginia</a>
<a href="#">D.C.</a>	<a href="#">Louisiana</a>	<a href="#">New</a>	<a href="#">Rhode Island</a>	<a href="#">Wisconsin</a>
<a href="#">Florida</a>	<a href="#">Maine</a>	<a href="#">Hampshire</a>	<a href="#">South Carolina</a>	<a href="#">Wyoming</a>
	<a href="#">Maryland</a>	<a href="#">New Jersey</a>		



## ***HEALTH AND MEDICINE***

### **Why Doctors in the Know No Longer Prescribe Blood Pressure Drugs**



August 27, 2017 – Some say Dr. Marlene Merritt (DOC, MS Nutrition) was incredibly brave to buck the conventional medical establishment and promote her [natural blood pressure cure](#).

But according to the Austin-based doctor, she became disgusted after seeing so many patients suffering nausea, dizziness, headaches, upset stomach, chronic cough, and extreme fatigue.

“It was like a bad flu epidemic,” she says, “except they didn't have the flu, they had high blood pressure.”

She soon discovered the root of the problem. They were all taking drugs like Lisinopril, Norvasc, Toprol XL, and Diuril, the standard high blood pressure treatments.

She knew she could do better.

Based on her unique training in Oriental and Nutritional medicine, Dr. Merritt spent months developing a natural blood pressure solution centered on a few key foods and light exercise.

The results startled her peers.



One patient using Dr. Merritt's natural solution watched his blood pressure plunge 75 points in a week, from 200/100 to 125/71.

Another patient dropped from 160/120 to 110/60. And yet another from 154/80 to 118/68 -- both in less than a month!

With this success, she decided to partner with health publisher, Primal Health, on an online video presentation that could get her solution out to many more people.

You may view the video by visiting <http://nmaio.primaltraffic.com/click>.

The video presentation detailing Dr. Merritt's solution has raced around the world, even as it's ruffled the feathers of old-school doctors and hard-line pharmaceutical executives.

But Dr. Merritt says, "It's been extremely gratifying to see people get their lives back. These drugs were beating them down, but not anymore."

Still, she cautions viewers to only go off medications with the *supervision* of a licensed medical practitioner.

You may also watch the surprising presentation by [clicking here >>](#)



## **PERSONAL FINANCE**

### **Reasons to Avoid Payday Loans**

Should you get a payday loan? In most cases, the answer is **No**.

If you need quick cash, you may be considering a payday loan. Although these types of loans are heavily advertised, think carefully before you get one. Payday loans end up costing enormous amounts of money, and once you go down the payday loan path, you could end up on the payday loan "treadmill." Here's why payday loans are rarely a good option if you need money.

#### **How Do Payday Loans Work?**

The payday loan industry is growing fast. In some states, these loans are illegal. A payday loan (some banks call them **advance loans**) works like this: Either you give the lender a check and get back an amount of money less than the face value of the check, or you sign an agreement giving the lender the right to withdraw money either from your bank account or from a prepaid card to which money, like wages, is regularly added.

Example. You give the lender a postdated check for \$300, and it gives you \$250 in cash, and keeps the remaining \$50 as its fee.

The lender holds the check for a few weeks (often until your payday). Now, you must pay the lender the face value of the check (\$300), usually by allowing it to cash the check. If you cannot make the check good, the lender requires you to pay another fee (\$50 in the above example). At this point, you owe the lender \$350 (the \$250 borrowed plus the first \$50 fee, plus a new fee of \$50).

The cost is the same if you give the lender the right to access your bank account or prepaid card instead of a check. The money you borrow (minus the lender's fee) is deposited directly to your account or card, and the payday lender withdraws the payment when due.

## The Payday Loan Treadmill

If you need another loan that week, the lender charges an additional fee, and so on. Many people who cannot make the original check good get into a “treadmill of debt” because they must keep writing new checks or allow additional withdrawals from their account to cover the fees that have accumulated, in addition to paying off the amount borrowed.

### Astronomical Interest Rates

According to the Pew Center on the States, borrowers using payday lenders average eight loans per year. This means the typical borrower will pay more than \$520 to repay a \$375 loan. The annual percentage rate on even one payday loan is astronomical, ranging from 200% to 500% or more.

### Special Payday Loan Rules for Military Servicemembers

Payday loans have been a problem for members of the military in recent years. Companies that offer payday loans, refund anticipation loans, auto title (auto pawn) loans, and rent-to-own arrangements, as well as used car dealers that emphasize in-house financing, cluster around military bases and advertise inside bases in official-looking military newspapers.

Because of these problems, federal law regulates these services for active duty personnel. The rules limit to 36% the annual percentage rate that lenders can charge servicemembers who are on active duty for more than 30 days or their dependents in extensions of consumer credit, including payday loans. The rule applies to loans for 91 days or fewer, and in an amount of \$2,000 or less. This means, for example, that now a payday lender cannot charge a servicemember more than \$1.38 in interest on a \$100 loan for two weeks. Payday lenders are not permitted to roll over loans to military personnel or their dependents either, unless the new loan has more favorable terms, such as a lower interest rate.

### State Regulations on Payday Loans

Some states also have laws aimed at curbing payday loan abuses, including laws limiting interest rates to 36%. Even in states with laws regulating payday lenders, you should still beware of payday lenders affiliated with American Indian tribes. Generally, *Indian tribes cannot be sued in state court*. Some payday lenders offering loans over the Internet associate themselves with an Indian tribe, claiming state laws do not apply to them. These lenders offer very high-cost payday loans, and *do not comply with state consumer protection laws*.

***The bottom line: A payday loan is a very expensive way to borrow money.***



## ***TRAVEL TIPS***

### **The One Thing You Should Never Do With Your Boarding Pass**



You are at the gate. You have got your boarding pass. You are heading somewhere exciting and you just cannot wait until you get there to share the news with your friends on social media. So, you snap a picture of your boarding pass and post it to Facebook. Harmless, right?

Maybe not.

Because the information printed on your boarding pass reveals a lot more than you think.

#### **Boarding Pass Don'ts**

As explained via a recent blog post by [KrebsonSecurity](#), there are websites that can read the barcodes on your boarding pass and provide someone else access to your travel information—your phone number, frequent flyer number, and information not only about the flight in question, but also all future flights booked through the same number.

With access to your boarding pass, someone could even change your seat on the plane, cancel any future flights, and reset your account PIN.

You may love your friends, but would you trust everyone you know on Facebook or Twitter with your private travel information? Didn't think so.

The takeaway here: ***“Don't post pictures of your boarding pass on social media.”***



## TIPS AND TRICKS

### Sad Desk Lunch No More: How to Have a Better Meal at Work



Weekday lunches can be bleak: limp salad, mushy sandwiches, take-out soup served so tongue-scalding hot you can't even taste how truly mediocre it is. And, of course, most of us are choking down these overpriced excuses for meals basked in the sterile glow of our office computer screens just to save time.

"It is still hard for people to eat delicious food that's affordable, easily accessible and good for you—especially in this ever-increasing pace of life," says Phil Winsor, founder of downtown New York's venerable veg-centric boîte (pronounced /bwat/, The Fat Radish). This lack of quick-and-healthy food options—even in a city as culinarily open-minded and entrepreneurial as New York—is a problem that's plagued Winsor for quite some time, and it's one that he and business partner Felipe Hallot, a former exec at Burger King, are hoping to help solve with the launch of a new fast food company, Tyme – <http://www.tymefood.com/>.



Tyme, which officially opens for business on Monday with direct delivery and a standalone take-out "Tyme Capsule" in Times Square, features pre-made meals designed to be healthy, accessible, and easy to eat. Each plant-based dish was conceived by chef Nicholas Wiber (currently at Soho House West Hollywood and former head chef of The Fat Radish and The East Pole) and contains wholesome ingredients like black rice, green tahini, chickpeas, and honey mustard beets arranged into attractive layers inside a recyclable screw-top jar—in short, a chicer, sleeker (and tastier) version of Pinterest's ubiquitous mason jar lunch. "People can throw the jars in their bag and eat on the move," explains Winsor of the concept. "And if you have lunch left over, you can reseal the jar and save the food for later. No need for plastic bags."

It's an approach that's sure to win fans among health-conscious, busy New Yorkers. But those who live outside NYC needn't go without while they wait for Tyme to expand to their city: Winsor says it's super easy to create healthy, Tyme-style lunches at home. Below, he shares his tips:





- **Pick a Base**

“This is usually a grain for slow-releasing carbohydrates and fiber,” says Winser. Next, layer on a sauce or hummus, then add layers of raw or roasted vegetables with a dressing. “The key is getting the right balance of carbohydrates, protein and fat, whilst maintaining flavor and visual appeal.”

- **Consider Different Cuisines**

Take a cue from Tyme and get inspired from the flavors of the world. “There is a saying that ‘if it grows to together it goes together,’ so in some dishes we take inspiration from countries we love,” says Winser. Mix black beans, chopped avocado, corn, and cilantro for a Mexican-inspired version, or roasted eggplant, faro, tomato sauce, and white beans for an Italian tinge.

- **Season Selectively**

So many takeout options are high in sodium and salt. “Our favorite combinations are tahini with roasted veggies, and fresh lemon and lime juice for bringing out flavors without all the added salt,” explains Winser, who says that mixing a variety of flavors, colors, and textures is the key to keeping things exciting, flavorful, and healthy.

---

### ***Aldesko Dining: How to Have a Lovely Lunch When You’re Stuck at Your Desk***



It’s noon, and a quick lap around the office reveals the unfortunate truth that for many, lunches are aglow in the light emanating from computer screens as meals assume the location previously occupied by keyboards. It’s a scene that’s all too common in offices across the country—welcome to the era of lunches eaten *Aldesko* (meaning “eating at your desk”).

A play on the Italian *alfresco*, the phrase has been bandied about to make the otherwise bleak experience more endearing. As charming as the expression maybe, it is anything but. Nearly a third of our weekly meals ([mid-afternoon nibbles aside](#)) are eaten deskside, yet many of us lack the accoutrements required to make it feel like a proper meal.

An informal office survey confirms the bleak state of desk tableware. For one staffer, the only utensils kept at her desk are “plenty of extra plastic silverware because the only thing that makes desk-lunch more depressing is having to eat your yogurt with a fork.” Cleanliness is of concern for another editor, who “puts paper towels everywhere” in lieu of a placemat. One staffer found a clever way to avoid a potentially awkward *Aldesko* scenario: “*I eat with a pair of chopsticks to prevent me from quick-shoveling an unchewable large bite into my mouth at the exact moment that I inevitably lock eyes with a coworker.*” Just one in the survey revealed a routine that bore any semblance to a dignified dining experience: “*Always on my desk is Sugahara’s water carafe and tumbler, both made of paper-thin, matte-black glass.*”

Taking a cue from Editor X’s deskside tableware, below is an attempt to inject a bit of ambiance and elevate the experience with these 12 must-haves for the perfect *aldesko* lunch. *Bon appétit!*

1. Add a domestic flourish to your desk and prevent coffee rings with a set of colorful Geode coasters (these are decorative *coasters* sliced from natural dyed agate *geodes* – *they are gold edged coasters and includes felt bumpers to protect your furniture*).
2. Forgo disposable plastic utensils in favor of portable flatware. Nothing enhances a meal more than the use of a proper knife and fork.
3. A play on the disposable cup: Keep a set of these ceramic crinkle cups on hand and skip the “to-go” cup.
4. When alfresco is not an option: Add a bit of greenery to your lunch, and upgrade your succulent to a low-maintenance desk topiary.
5. Salt and pepper shakers seem far more dignified than a paper packet of seasoning.
6. For those who opt to plate their *aldesko* lunch, go with durable enamelware—it’s sturdy enough to get tossed into a desk drawer in between meals.
7. The simplest way to enhance your afternoon cup of tea is to choose loose leaf over tea sachets.
8. Bring the calm of Sunday morning to your desk by way of your favorite mug.
9. Garnish your iced coffee with a decorative paper straw.
10. Stay hydrated and reduce trips to the kitchen with a beautiful water carafe to be enjoyed all day long.
11. It might extend your coffee break by a minute or two, but when possible, brew your own cup (and save a few dollars) with a personal French press.
12. An olive oil and vinegar caddy ensures you always get the perfect amount of dressing.



## CONSUMER PROTECTION

### Telemarketers Just Got Harder to Stop –New Technology Allows Users to Leave Voicemail Without Phone Ever Ringing

By Brandon Grovel (AARP, June 19, 2017)



Developers of the backdoor voicemail argue that the “*Do Not Call List*” does not apply.

We have all received them, on our home phone or cellphone – a telemarketer trying to sell us a product or service. Some of us simply ignore the call, others answer and quickly hang up, while some do listen to the telemarketer’s message. Soon, however, we might not have any of those options; telemarketers have a direct way into our voicemail.

Ringless voicemail is a new technology that allows users to leave you a voicemail through a back door, without the phone ever ringing. There is growing concern that this capability can allow telemarketers to flood your voicemail, causing you to miss important messages.

The technology has been successfully used for hospitals, schools and churches, and developer Josh Justice, CEO of Stratics, says he believes it can be a success in other ways. Justice told NBC News: “Ringless voicemail drops are a non-nuisance form of messaging and are an alternative to robocalls. It really does put the power in that consumer’s hand where they can essentially listen to the message or not listen to the message.”

There are [consumer protection](#) laws that restrict some telemarketing, but it is unclear if ringless voicemail falls under the restrictions. The providers of the technology and business groups contend that, since the phone doesn’t ring, it’s not a call – and therefore exempt from the current laws, the *New York Times* reported.

A provider of the service has already filed a petition with the Federal Communications Commission (FCC) to officially allow it. The commission has been accepting public comments on the issue, but has not given a timetable of when it would decide.

Politicians are divided on the issue, as it could also restrict their use of the service for campaign purposes.

As of now, there is no way to block the unwanted voicemails. Phones do not yet have a spam feature comparable to those on emails, and developers of the backdoor voicemail argue that the “*Do Not Call List*” does not apply. You can comment on the petition by visiting [https://www.fcc.gov/ecfs/search/filings?q=\(proceedings.name:\(\(02-278\\*\)\)%20OR%20proceedings.description:\(\(02-278\\*\)\)&sort=date\\_disseminated,DESC](https://www.fcc.gov/ecfs/search/filings?q=(proceedings.name:((02-278*))%20OR%20proceedings.description:((02-278*))&sort=date_disseminated,DESC), or contact the FCC to file a complaint at [https://consumercomplaints.fcc.gov/hc/en-us/requests/new?ticket\\_form\\_id=39744](https://consumercomplaints.fcc.gov/hc/en-us/requests/new?ticket_form_id=39744).



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:** September 2017

**Your Name:** \_\_\_\_\_ **Position held, if any:** \_\_\_\_\_

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

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



# Upcoming Events

## *San Francisco Legal Professionals Association*

### **September 26, 2017 Brown Bag Presentation**



**Brown Bag Presentation  
Presented by Tony Klein**

#### **Everything You Wanted to Know About Serving Subpoenas**

How many times have you dealt with people evading a subpoena or been confused about who and where you need to actually serve the Subpoena? How many times do you need to attempt before you can serve by mail? Do you have to pay witnesses and how much? Tony Klein will present an in depth presentation about serving subpoenas sharing his knowledge from over 40 years of experience.

**Tuesday, September 26, 2017**

**12:30 – 1:30 p.m.**

**Coblentz Patch Duffy & Bass LLP**

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

RSVP to: Francie Skaggs – [francieskaggs@gmail.com](mailto:francieskaggs@gmail.com) - by: Friday, September 22, 2017

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

#### **About the Speaker:**



Tony Klein has been a process server for over 40 years and has handled 100,000 to 200,00 process serving assignments in the San Francisco Bay Area, including service of lawsuits, writs, subpoenas for personal appearance and production of business records, out-of-state deposition subpoenas, and stakeouts.

Tony attended Northwestern California University School of Law and conducts many seminars and events for process servers and private investigators throughout California. He is currently the owner of Process Server Institute and Attorney Service of San Francisco.

**The SFLPA is an accredited MCLE Provider through Legal Secretaries, Incorporated. For more information about the programs offered through the SFLPA, visit our website at: [www.SFLPA.org](http://www.SFLPA.org).**



## *San Francisco Legal Professionals Association*

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

[www.sflpa.org](http://www.sflpa.org)

### **MEMBERS QUARTERLY DINNER MEETING**

**(NON-MEMBERS WELCOME)**

**Date:** Tuesday, October 17, 2017

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

**Place:** Ogletree, Deakins, Nash, Smoak & Stewart  
One Market Plaza, Suite 1300, San Francisco

**Speaker:** Michael Thomas, Esq., Associate at Ogletree

**Topic:** "Laws Impacting Diversity and Inclusion"

**Dinner Menu:** Bucca di Beppo, dessert, soft drinks, coffee, beer and wine.

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

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

**Please RSVP:** By Friday, October 13, 2017 to [sflpa.event.reservations@gmail.com](mailto:sflpa.event.reservations@gmail.com)

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

½ Hour MCLE & CCLS Continuous Education Certificates Available

### **About Our Guest Speaker**

**Michael Thomas** – Mr. Thomas' practice focuses on representation of employers in wage and hour class actions and PAGA claims. Michael also advises and defends employers on all aspects of labor and employment matters, including wrongful termination, discrimination, and whistleblower retaliation. Michael also represents employers in traditional labor law matters. He advises and represents employers before the National Labor Relations Board, including in unfair labor practices and representation hearings. In addition, he represents employers in discharge and contract interpretation arbitrations. Michael also speaks regularly on issues of diversity and unconscious bias.

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





## Legal Secretarial Training Course

The SFLPA is pleased to announce a new multi-week educational program! This program will provide 24 hours of classroom training, covering a variety of topics that pertain to the specific duties of attorney support staff in the law office.

Topics will include:

Introduction to Law Office & Ethics	Court Structure
Manual Court Filings & Service of Process	Electronic Filing & Electronic Service
Business Writing	Corporations
Calendaring	Discovery

Our committee is currently in the process of designing the curriculum for this course. Once the course materials and the panel of instructors have been finalized, more information will become available.

*If you are interested and would like to be put on our pre-registration list, please contact our Education Chair: Francie Skaggs – [francieskaggs@gmail.com](mailto:francieskaggs@gmail.com).*

Stay tuned as we plan to release registration information by November 1, 2017.





**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.

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

### Personal Information

Name: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
Last 4 digits of SSN: \_\_\_\_\_ Email: \_\_\_\_\_  
Phone (Day): \_\_\_\_\_ Phone (Evening): \_\_\_\_\_  
LSI Member: ☐ Yes (enclose copy of LSI Membership Card) ☐ No  
Name of Local LSI Association: \_\_\_\_\_

### Employment Information

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

Position: \_\_\_\_\_ Dates of Employment: \_\_\_\_\_  
Employer: \_\_\_\_\_  
(name and address)  
Supervisor: \_\_\_\_\_ Supervisor's Phone: \_\_\_\_\_  
Supervisor's Email: \_\_\_\_\_  
Summary of Duties: \_\_\_\_\_

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

Date: \_\_\_\_\_

Applicant Signature \_\_\_\_\_

\*Fees subject to change without notice.  
Rev. February 2017



# INDISPENSABLE



## LEGAL PROFESSIONAL'S HANDBOOK

...THE ULTIMATE RESOURCE GUIDE!

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

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

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

## LAW OFFICE PROCEDURES MANUAL

...THE IDEAL TRAINING MANUAL FOR NEW STAFF!

This Manual contains detailed practice forms for every major area of law practice, along with step-by-step instructions for completing them. This is a "must-have" forms guide for legal secretaries, paralegals and new lawyers; and it's a great resource for training your office staff. In fact, the Manual is frequently used in schools, workshops and legal secretaries classes. You'll also find handy miscellaneous aids, such as procedural checklists and guidelines, tips on transcription and proofreading, law office abbreviations and legal terminology, and a list of useful reference books.

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

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

Buy both LSI books together and get a discount!  
Combo price for both books.....\$425  
Price includes shipping. Add applicable sales tax.

COMPILED BY

**LEGAL SECRETARIES, INCORPORATED**

PUBLISHED BY

**TRG THE RUTTER GROUP™**



THOMSON REUTERS

40541696

TO ORDER OR FOR MORE INFO, CALL  
**(800) 747-3161 (EXT. 2)**  
www.RutterGroup.com™

### SUBSCRIPTION DETAILS

By checking the box next to "YES, I WANT TO SUBSCRIBE," you authorize The Rutter Group, a Division of Thomson Reuters, to automatically ship you Updates, new editions, and/or supplements (including but not limited to: looseleaf pages, pamphlets, replacement volumes, other related supplemental materials and new CD-ROM versions or updates) of the title(s) requested as they are published.

Upon shipment, you will be invoiced at the price at which the Update is being offered. You will not be charged a separate shipping and handling fee. You will continue to receive Update shipments automatically until you cancel your subscription. You may cancel at any time by contacting Customer Service at (800) 747-3161, ext. 3.

With this subscription, you agree to the terms of the standard West, a Thomson Reuters business, sales agreement; a copy is available on request by calling (800) 328-4880.

### RETURNS

If you are not completely satisfied with any print or CD-ROM product received from us, the product may be returned within 45 days of the date of shipment for a full refund or credit, in accordance with our then-current returns policies. See [legalsolutions.com](http://legalsolutions.com) for the Thomson Reuters return policy and how to return a product, or contact Customer Service at (800) 747-3161, ext. 3.

Prices are subject to change without notice.

40530574

# 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](mailto: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](http://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](mailto:dawn.forgeur@stoel.com)  
[www.lsi.org](http://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](http://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](http://www.sflpa.gov)

Please fill out this application, sign it and submit it to your sponsor along with a check for \$55.00 made payable to SFLPA.<sup>1</sup> **This payment covers a one-time initiation fee and your first year<sup>2</sup> of annual membership dues for Legal Secretaries, Incorporated (LSI).**<sup>3</sup> A copy of this completed form is your receipt for your annual dues. Upon becoming a member, this information will be included in the Membership Roster which is shared with current members only. You will receive a membership card for the current fiscal year by U.S. Mail.

PERSONAL:	BUSINESS:
NAME: _____	Your Title: _____
Hm Address: _____	Employer: _____
City ST Zip: _____	Address: _____
Hm Ph: _____ Cell: _____	City ST Zip: _____
Email: _____	Email: _____
[Note: Your contact information will not be distributed outside SFLPA or LSI without your consent.]	Wk Ph: _____ How long? _____
	Contact Preference: <input type="checkbox"/> Home <input type="checkbox"/> Business
SPONSORSHIP:	FORMER EMPLOYMENT
Sponsor's Name: _____	Former Employer: _____
How did you find out about SFLPA? _____	City, State: _____
_____	How long? _____
Why do you want to join SFLPA? _____	Total Experience: Legal _____ Litigation: _____
_____	Areas of Practice: _____
Have you ever been a member of this Association or any others in the past? If so, when? _____	_____
_____	Have you completed or are you currently enrolled in an SFLPA Civil Litigation course? <input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____
List at least one SFLPA-Sponsored function that you attended as your pre-requisite for membership and include date(s):	1. _____ Mo. _____ Yr: _____
	2. _____ Mo. _____ Yr: _____

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

(CONTINUED NEXT PAGE)

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



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

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

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

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

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

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

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



## San Francisco Legal Professionals Association

### MEMBERSHIP RENEWAL FORM

For The Fiscal Year of May 1<sup>st</sup> Through April 30<sup>th</sup>

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

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

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

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

MEMBER INFORMATION			
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](http://www.sflpa.org). Thank you for your continued support as a member of the San Francisco Legal Professionals Association.





## CHANGE OF ADDRESS FORM

Member Name \_\_\_\_\_

New Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

\_\_\_\_\_  
New Home Telephone

\_\_\_\_\_  
New Office Telephone

\_\_\_\_\_  
New Personal Email Address

\_\_\_\_\_  
New Work E-Mail Address

\_\_\_\_\_  
New Employer Name

New Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

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

### YOUR SPECIALTY:

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

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

\_\_\_\_\_  
\_\_\_\_\_

### Please submit to:

SFLPA

P.O. Box 2582

San Francisco, CA 94126-2582

# Member Benefits

## Advantages of Membership

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

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

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

## MAKE A CAREER CHOICE – BECOME A LEGAL PROFESSIONAL

### Why Become a Legal Professional?

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

### Why Join Legal Secretaries, Incorporated?

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

### How You Can Become a Legal Professional:

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

## Discounts for LSI Members

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

## LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

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

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

Revised 03/2017



## SAN FRANCISCO FESTIVALS AND EVENTS 2017

### SEPTEMBER 1-30

Architecture and the City

Citywide, 415-362-7397

[www.aiaasf.org/archandcity](http://www.aiaasf.org/archandcity)

Sponsored by AIA San Francisco, the largest architectural and design festival in the U.S. includes a series of architectural tours, film screenings, exhibitions, design lectures, home shows and more.

### SEPTEMBER 20-24

Big Book Sale

Fort Mason Center

<http://www.friendssfp1.org/>

Held at Fort Mason Center's Festival Pavilion, the Annual Big Book Sale will feature over 500,000 books, DVDs, CDs, books on tape, vinyl and other forms of media in over 100 categories.

### SEPTEMBER 22-24

Oktoberfest By The Bay

Pier 48 near AT&T Park, 888-746-7522

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

Bringing Munich's autumn beer festival to the Bay, Oktoberfest features non-stop singing, dancing, music, German food and beverages.

### SEPTEMBER 23-24

San Francisco International Dragon Boat Festival

Lake Merritt, Oakland

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

Nearly 100 dragon boat teams and 2,500 paddlers from across North America will race the 500-meter course; festival also features entertainment and children's activities.

### SEPTEMBER 23-24

Bay Area Blues Festival

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

Two main stages, a merchant marketplace, arts and crafts, gourmet food booths and much more are all a part of this annual homage to San Francisco's blues roots.

### SEPTEMBER 24

Folsom Street Fair

Folsom Street between Seventh and 12th Streets, 415-777-3247

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

The "daddy of all leather celebrations," the Folsom Street Fair is the largest leather, alternative and fetish street fair in the world drawing some 400,000 attendees annually, dressed in leather, rubber, uniforms, drag or very little at all.

### SEPTEMBER 30

Sausalito Floating Homes Tour

Sausalito, 415-332-1916

[www.floatinghomes.org](http://www.floatinghomes.org)

Self-guided tours include access to dozens of the most unique homes in the world; docents are onboard to describe Sausalito's incredible waterfront style and to answer questions.

### SEPTEMBER 30-OCTOBER 1

Autumn Moon Festival

Grant Ave. between California and Pacific Streets, 415-982-6306

[www.moonfestival.org](http://www.moonfestival.org)

This event features multicultural entertainment, traditional lion and dragon dances, arts and crafts, lantern village, moon cakes and children's activities.

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