

The
LEGAL PROFESSIONAL[®]

MAY 2024



**“ALOHA” - CELEBRATING LPI'S 90TH ANNUAL CONFERENCE
OF DELEGATES AND BOARD OF GOVERNORS MEETING**

By Cyndee Saucedo, CCLS, Page 7

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TABLE of CONTENTS

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*Dedicated to LSI Past President,
Joan M. Moore, PLS, CCLS*

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FEATURES

- 2** President's Message
By Rod Cardinale, Jr.
- 7** Aloha – Celebrating LPI's 90th Annual Conference of Delegates and Board of Governors Meeting
By Cyndee Saucedo, CCLS
- 9** Governor Newsom Mandates Additional Paid Sick Leave For Employees. Does Your Policy Comply?
By Susan Bishop
- 11** Leveraging Automation and AI in the Legal Profession: Enhancing Efficiency While Ensuring Compliance
By Vince Corrales
- 14** 30 Days Before Trial: Its All About Teamwork
By Elise Dresser, CCLS and Jessica Te
- 18** Legacies (Inspiration Message from February Quarterly Conference)
By Mary Lou Floyd, CCLS
- 26** Back to Basics: Sticky Situations and Legal Support Staff
By Lynne Prescott, CCLS

EDUCATIONAL OPPORTUNITIES

- 6** Continuing Legal Education and Legal Technology Training Seminars (in Person or via Zoom) – (LPI Annual Conference – May 17-18, 2024)
- 8** "Speed Mentoring" - LPI's Officer-Chair Workshops (in Person only)
(LPI Annual Conference – May 17, 8:30 a.m.-11:45 a.m.)
- 23** LPI's First Quarterly Conference Registration and Hotel Information "Under the Sea" – Hosted by LPI on August 16-18, 2024
- 25** Continuing Legal Education - Save the Dates re Summer Court Series Information
- 29** LPI University – Appellate Procedures in California and the Ninth Circuit Court of Appeals Online Course Information (commences May 14, 2024)

MISCELLANEOUS

- 5** Congratulations to LPI 100% Club Members
- 15** Dates to Remember in 2024
- 19** Congratulations to New CCLS's
- 20** Photos of LPI's Third Quarterly Board of Governors Meeting (February 2024)
- 31** CCLS Quiz: Law Office Administration
- 32** CCLS Quiz Answer Key
- 35** LPI 2023 Course Catalog Info.
- 38** LPI Roster 2023-2024
- 40** LPI Benefits

ADVERTISERS

- IFC** Macro Pro
- 10** Barkley Court Reporters
- 10** Redroman Creative
- 12** Rhino Investigation and Process Serving LLC
- 13** Esquire Deposition Solutions
- 16** Saylor Legal Service
- 17** Swift Legal
- 22** Commercial Process Serving, Inc.
- 24** Rapid Legal
- 27** Alpha Global Language Consultants
- 28** ASAP Legal
- 30** Titan Legal Services
- 32** WebEditor Design Services
- 33** The Rutter Group
- 34** Affirm Investigative Solutions
- 35** Gumshoe Detective Agency
- 36** Direct Legal Support
- 37** Knox Attorney Service
- IBC** First Legal Network
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PRESIDENT'S MESSAGE

BY ROD CARDINALE, JR.



ROD CARDINALE, JR.

is LPI's President and a member of the Santa Clara County Legal Professionals Association ("SCCoLPA"). He is a Sr. Paralegal and Officer Manager at The Law Office of Janet L. Brewer. Rod served as President of SCCoLPA from 2010-2014. In Rod's spare time he likes to cook, travel, watch sports and spend time with his family.

**Stronger
Together**

Our 3rd Quarterly Conference, held at the Embassy Suites by Hilton in Walnut Creek, CA, was a resounding success. With a great turnout and positive feedback from attendees, it's clear that everyone had a fantastic time. Legal Professionals, Inc. ("LPI") and Mt. Diablo LPA collaborated to curate a weekend with valuable educational offerings, great friendships, and amazing food.

Under the theme "Hail to the Chiefs," the conference banquet featured a presentation led by LPI Executive Advisor and former LPI President Lynne Prescott, CCLS. It was a fitting occasion to honor and pay tribute to all our esteemed Past Presidents, with special recognition extended to those present at the event and those joining remotely via Zoom.

The atmosphere turned poignant as we commemorated the memory of our late friend and former LSI President, Jennifer L. Page, CCLS. Not a dry eye remained in the room as we reflected on Jennifer's enduring legacy and her profound impact on all of us.

A heartfelt thank you goes out to all our vendor partners whose support was instrumental in making the conference a resounding success. And to each attendee, your presence and enthusiasm contributed immensely to making the weekend truly memorable.

As my term as President comes to an end, it's a moment to reflect on the challenges and triumphs we've experienced together over the past two years. It all began in May 2022, when I was elected and installed as the first male President, a significant milestone in our history. I took on the role with a clear understanding of the challenges that lay ahead, as the legal landscape had evolved significantly since the founding of Legal Secretaries Incorporated ("LSI") in 1940.

With the help of our amazing Executive Committee, Donna Day, Bettina Jacobson, Rita Burnett, CCLS, Erika Garduno, Lynne Prescott, CCLS, and Elise Dresser, CCLS, we outlined a Strategic Plan to deliver on my promises.

Our Strategic Plan aimed to achieve several key objectives within a two-year timeframe. These included systematically rewriting LPI's Bylaws and Standing Rules, restructuring our education system, implementing new marketing strategies across all platforms, and establishing connections with key organizations such as the Association of Legal Administrators ("ALA") and local bar associations. Additionally, we aimed to significantly increase our strategic partnerships and increase our support for the local associations of LPI, targeting a 50% increase in membership by April 30, 2024.

To better serve our educational goals, we planned to refine our audience targeting strategies and establish a defined curriculum for our new educational silos. Furthermore, we recognized the need to raise membership dues to provide us with additional resources to bring this plan to fruition. By pursuing these initiatives, we aimed to strengthen LPI's infrastructure, expand our reach, and enhance the value we provide to our members.

As a results-driven individual, failing to achieve the goals I set for myself and for LPI was never an option. From a young age, my mother, a remarkable woman, instilled in me the belief that I could accomplish anything I set my mind to. Her words of encouragement have served as a guiding light throughout my life, propelling me to pursue challenges with unwavering determination and perseverance. I was

Continued on page 3 →

← Continued from page 2

confident I had surrounded myself with incredibly diverse, intelligent, and like-minded individuals to help achieve our goals.

Together, we successfully and systematically rewrote LPI's Bylaws and Standing Rules over a one-year timeframe.

Not only did we eliminate the Legal Specializations Sections and replace them with our new Educational Silos (LPI Technology Training, LPI University, and LPI Continuing Legal Education), we have added two additional instructors (Bethnay Enz and Lynne Prescott, CCLS) and vastly expanded our educational opportunities. LPI is now conducting, on average, eight to twelve educational events per month in addition to the multi-week courses and education opportunities at LPI conferences. The Herculean effort it took to overhaul the entire educational system of LPI was no small feat. We must all give our thanks to Renee Evans, CCLS, Mary Lou Floyd, CCLS, Cyndee Saucedo, CCLS, and all the members of the LPI Education Council for all the hard work, time, and energy they have all exerted. You all did an amazing job, and I'm eternally grateful to each and every one of you for making my vision a reality.

Our remarkable and talented Lynne Prescott, CCLS, played a pivotal role in realizing our goal of establishing a defined curriculum for the new LPI Education Silos. Through her expertise and dedication, Lynne created our inaugural Education Course Catalog, a comprehensive resource that outlines the diverse range of courses available to our members.

If you haven't already had the opportunity to review our course catalog, I encourage you to do so. It is linked here: [LPI Course Catalog](#).

Under the stewardship of our exceptional Social Media Chair, Ron

Ackland, we have successfully expanded our marketing strategies through a targeted social media campaign. When I inquired about the growth of our social media presence over the past two years, Ron shared, "We've increased our connections by leaps and bounds. We currently have 1,143 followers on LinkedIn. People are finally following and sharing our posts and are interested in what we have to share and say."

Thanks to Ron's diligent efforts on social media, we've seen remarkable engagement. Our classes have drawn participants from at least ten states and four countries, with attendees even promoting our events on their own websites. This outreach demonstrates the power of effective digital marketing in extending our reach far beyond our local community. If you're not already following us on Social Media, I encourage you to do so!

As the California Career Promotions/ Professional Liaison, Erika Garduno and Scholarship Chair, Chreon McAleece, CCLS, created a database of every paralegal school, Local Bar Association, and ALA chapter that we could use to help market our new name and the LPI Educational Silos. I would use that database to send a letter to every one of them. As California Career Promotions/ Professional Liaison, Leanne Ruesink has been working extremely hard, making multiple presentations at law firms all over Northern California, directly resulting in at least 50 new members to local associations and LPI.

We successfully achieved our goal of establishing connections with the ALA. Over the past two years, Donna Day, Renee Evans, CCLS, Carla Clark, CCLS, Leanne Ruesink, and I have collectively made presentations for multiple chapters of the ALA. In a significant effort to grow our relationship, Renee, Leanne, and Carla attended the San Diego ALA Resource Fair late last year.

While our progress with the local bar associations and the California Lawyers Association may not have met my expectations, I am confident that incoming LPI President Donna Day will continue to carry the torch forward. Her dedication and determination will undoubtedly lead to further advancements in building stronger relationships with both organizations, enriching our network, and creating opportunities for collaboration.

I'm proud to announce that we've successfully achieved our goals of strengthening partnerships and fostering relationships within the legal community vendor sphere. Under the exceptional leadership of our Advertising Chair, Heather Czuleger-Nowak, we've witnessed a remarkable increase in paid advertisers, soaring from five to 20 over the past two years.

In addition to our valued Joint Venture Partner, First Legal, we've expanded our collaborative network by welcoming Esquire Deposition Solutions as our second Joint Venture Partner. As I compose this article, Heather Czuleger-Nowak and I are actively engaged in efforts to onboard a third Joint Venture Partner, further enhancing our alliances within the legal community.

These partnerships are vital in advancing LPI's mission and providing valuable resources to our members. I must thank Heather Czuleger-Nowak for her outstanding dedication and efforts in driving this significant growth and our amazing Joint Venture Partners for your unwavering and continued support of LPI.

I aimed to support the struggling local associations of LPI and recognized the need to adapt to changing times, which also meant reevaluating the purpose of our associations. Among the various initiatives undertaken to assist our local associations, the most impactful was identifying an opportunity to capitalize

Continued on page 4 →

← Continued from page 3

on the growing attendance at LPI's educational events. I devised a solution allowing individuals signing up for LPI's educational offerings to seamlessly join a local association or LPI as a Member at Large (MAL) through the LPI website. Since the implementation of this feature in October 2022, over 280 new members have joined local associations across the state, with the number of MALs reaching over 120—twice the previous count.

During my presidency, we successfully increased per capita dues payable to LPI for the first time in nearly two decades, raising them by ten dollars. However, I recognize that more action is necessary. Despite our achievements, it's evident that we need to generate additional revenue to ensure our organization's financial stability and sustainability in the 21st century, particularly considering the rising inflation and the rising cost of business operations in 2024.

That's why I announced at the February Board of Governors meeting that, in order to meet our increasing operational costs, we must once again raise the per capita dues. I propose a twenty-dollar increase per person. I understand that raising dues may not always be well-received, but it's a necessary step if we wish to continue enjoying the benefits we've become accustomed to. Your understanding and support in this matter are crucial as we work to secure the future of our organization.

I am immensely proud of the collective efforts of all the LPI Officers and Chairs

in bringing to fruition the bold agenda set forth two years ago. Together, we have achieved significant milestones. Our collaboration has led to a notable surge in membership, soaring from approximately 630 to nearly 1,200 members. Although we fell slightly short of the ambitious target of a 50% increase by April 30, 2024, our progress is undeniable.

Furthermore, we have expanded our Joint Venture Partnerships, more than tripled the number of paid advertisers, and significantly increased our presence on social media platforms. This strategic focus has translated into remarkable growth in attendance at our educational offerings. Notably, our revenue from educational classes has skyrocketed from around \$40,000 in the fiscal year 2021-2022, to over \$110,000 in the fiscal year 2023-2024.

Moreover, we have fostered new relationships with esteemed organizations such as the ALA and paralegal schools. These partnerships, coupled with our concerted efforts, have positioned LPI as a premier destination for legal education in California. Together, we have laid a solid foundation for continued growth and success in the years to come.

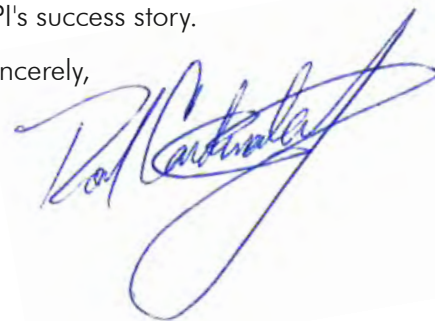
I want to extend my heartfelt gratitude once again to all the LPI Officers and Chairs for their unwavering dedication in making my vision for LPI a reality. Together, we've achieved remarkable feats, and each of us should take pride in our collective accomplishments.

Indeed, we are "Stronger Together."

As the curtains close on my tenure as LPI President, I am humbled by the trust and support you have bestowed upon me. Being the first male President, or the first in any role, comes with its own set of challenges and expectations. Yet, every day, I strived to lead with integrity, acting with loyalty, competence, and diplomacy in accordance with the highest standard of professional conduct, providing you with an organization you can be proud of. My intentions have always been sincere, and I've given my best effort in service to LPI.

Serving as your President and contributing to LPI's rich legacy has been an immense honor. Now, as I step aside, I do so with confidence in Donna's extraordinary leadership. Together, let us continue to write the next chapter of LPI's success story.

Sincerely,



**Stronger
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TO OUR 100% CLUB MEMBERS!



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05.17.24 - 05.18.24

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FRIDAY MAY 17

Continuing Legal Education

1:45 PM to 2:45 PM

BASIC SEC INVESTIGATIONS AND PUNISHMENTS

Speaker:

Evan Seite, Esq.

Wilson Sonsini Goodrich & Rosati



3:15 PM to 4:15 PM

EMPLOYMENT LAW UPDATES

Speaker:

Jeanine DeBacker, Esq.

MacPharlin Sprinkles & Thomas LLP



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Continuing Legal Education

IN PERSON

(With Conference Registration)

LPI MEMBER: FREE

Non-LPI MEMBER: \$15

Walk Ins:

LPI MEMBER: \$5

NON-LPI MEMBER: \$20

VIA ZOOM

LPI MEMBER:

First Seminar: \$15

Each Additional: Free

Non-LPI MEMBER: First

Seminar: \$30

Each Additional: \$15



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Training

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\$30 for both

Non-LPI Member: \$55 /

\$100 for both

(\$5 Late Fee After May 10)

SATURDAY MAY 18

Continuing Legal Education

1:45 PM to 2:45 PM

TRUST FUNDING: PRE- AND POST- DEATH

Speaker:

Lori Hunt, Esq.

Manfred & Hunt LLP



3:15 PM to 4:15 PM

PRO BONO SERVICES FOR ASYLEES

Speaker:

Malavika Lobo, Esq.

Wilson Sonsini Goodrich & Rosati



Legal Technology Training

1:45 PM to 2:45 PM

ADVANCED WORD*

Speaker: June Hunter



3:15 PM to 4:15 PM

ADVANCED ADOBE*

Speaker: June Hunter

***Does not qualify for MCLE**



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“ALOHA” CELEBRATING LPI’S 90TH ANNUAL CONFERENCE OF DELEGATES AND BOARD OF GOVERNORS MEETING

BY CYNDEE SAUCEDA, CCLS, 2024 ANNUAL CONFERENCE CHAIR

With the gentle breeze carrying the scent of tropical blooms and the promise of adventure, anticipation builds for an upcoming weekend of enchantment and celebration at LPI’s 90th Annual Conference of Delegates and Board of Governors Meeting on May 16-19, 2024 at the DoubleTree by Hilton in Newark, California, co-hosted by Alameda County LSA and LPI. The stage is set for an unforgettable gathering where guests will indulge in the essence of Hawaiian bliss.

The weekend will start off with Officer/Chair "Speed Mentoring" workshops on Friday morning, which takes place right before the all-inclusive Roundtable Luncheon. Following the luncheon are two great educational workshops on Friday afternoon so make sure to sign up for them.

Our Friday evening Social Event offers a unique opportunity for attendees to immerse themselves in the art of lei-making. Presented by Esquire Solutions and expertly guided by Leanne Morton, Fresno County LPA, participants will weave together their own personalized leis, each strand a reflection of creativity and camaraderie. As the evening unfolds, guests will be treated to a feast for the senses, with an array of delectable street tacos.

The Pre-Board of Governors meeting will kick things off on Saturday morning, followed by the opening ceremonies of the Annual Conference General Session. The business of the corporation will be discussed and awards will be given, along with the election of officers for the 2024-2025 term. After the first session is recessed, the new CCLSs will be celebrated at the Kalman S. Zemplyny II Luncheon.



You will have the opportunity to attend more educational classes on Saturday afternoon, so be sure you sign up ahead of time to secure your spot. The classes will also be offered via Zoom.

Saturday’s luau themed Banquet promises to be a culinary journey, showcasing the diverse flavors and vibrant colors of island cuisine. Attendees are encouraged to embrace the laid-back charm of the islands by donning their finest Hawaiian-themed attire. From vibrant aloha shirts to flowing dresses adorned with floral patterns, every outfit becomes a celebration of island style and tropical flair. Adding to the allure of the evening, the air will be alive with the captivating rhythms of Hawaiian melodies, providing the perfect backdrop for the graceful movements of Tahitian Dancers. Their mesmerizing performances will transport guests to the shores of Polynesia, where the spirit of aloha flows freely and the joy of dance knows no bounds.

The annual awards ceremonies will also take place at the Banquet, with the Chapter Achievement Awards, President’s Award, Rising Star Award, and Legacy Award to be presented. The new CCLSs will also be formally presented and congratulated on their outstanding achievements.

As the event draws to a close, Sunday's brunch offers a moment of reflection and renewal, as newly elected Officers and Chairs for the upcoming fiscal year are installed. An American plated breakfast will greet attendees as they come together to celebrate leadership and embrace the opportunities that lie ahead as we install our newly elected Officers and Chairs for 2024-2025.

In the glow of the Hawaiian moon, amidst laughter, friendship, and the spirit of aloha, this future event promises to be a celebration of island serenity and the magic of shared experiences. We look forward to seeing you there!



"SPEED MENTORING" LPI'S OFFICER-CHAIR WORKSHOPS

**FRIDAY, MAY 17, 2024
8:30 AM - 11:45 AM
FREE TO ALL LEGAL PROFESSIONALS**

**THE FOLLOWING TOPICS WILL BE
DISCUSSED DURING THIS YEAR'S
OFFICER-CHAIR WORKSHOPS:**

**PARLIAMENTARIAN
MEMBERSHIP
GOVERNOR
TREASURER**

**MARKETING
SOCIAL MEDIA
PROGRAMS
LEGAL PROFESSIONAL TRAINING**

**SPEED MENTORING CONDENSES
LEARNING AND NETWORKING INTO
SHORT, FOCUSED SESSIONS, MAXIMIZING
THE EFFICIENT USE OF TIME FOR BOTH
MENTORS AND MENTEES.**

**Please sign up no later than Monday, May 13th at
LegalProfessionalsInc.org/events/
or click on the QR Code.**



GOVERNOR NEWSOM MANDATES ADDITIONAL PAID SICK LEAVE FOR EMPLOYEES. DOES YOUR POLICY COMPLY?

BY SUSAN E. BISHOP – SUBMITTED BY STANISLAUS COUNTY LPA

On October 4, 2023, Governor Newsom signed Senate Bill 616, amending the Healthy Workplaces, Healthy Families Act of 2014 (the Act). In the simplest terms, beginning in 2024, employers covered by the Act will be required to provide a minimum of five days of paid sick leave (or 40 hours) instead of the currently mandated three days (or 24 hours).

This amendment did not change the standard accrual method for sick leave; employers may still require employees to accrue sick leave at a rate of one hour for every 30 hours worked.

Employers should be aware of the following changes to existing law which go into effect on January 1, 2024:

- Currently, paid sick leave accrual methods must result in 24 hours of accrued paid sick leave by the 120th calendar day of employment, each calendar year, or each twelve-month period.
The Act now requires that an employee accrue at least 40 hours of paid sick leave by the 200th calendar day of employment.
- Currently, employers may limit an employee's use of accrued paid sick leave to a minimum of 24 hours or three days in each year of employment, calendar year, or twelve-month period.
The Act increases the minimum useable paid sick leave to 40 or five days in each year of employment, calendar year, or twelve-month period.

- Currently, the term "full amount of leave" is defined as three days or 24 hours.

The Act now defines "full amount of leave" as five days or 40 hours.

- Currently, employers are not required to provide additional paid sick leave if the employer has a paid time off policy that may be used for sick leave and provides at least three days or 24 hours of leave within six months of employment.

The Act now requires that an employee must be eligible to earn at least five days or 40 hours of paid time off within six months of employment under these alternative plans.

- Currently, under an accrual method, employers must allow paid sick leave to roll over to the following calendar year, but an employer may cap the total accrual at 48 hours or six days.

The Act now increases the minimum accrual to 80 hours or ten days.

Additionally, this amendment expands procedural protections on the use of paid sick days to employees covered by valid collective bargaining agreements and amends the schedule for in-home supportive service providers (IHSS) to increase their paid sick leave accrual to five days/40 hours in each year of employment.

For more information on Senate Bill 616, [the text of SB 616 can be found here.](#)



This article is not intended to and does not constitute legal advice or a solicitation for the formation of an attorney-client relationship. For questions about paid sick leave or other employment law matters, please contact our Labor & Employment group at 408.286.5800 or susan.bishop@berliner.com.










SUSAN BISHOP is a partner in the Labor & Employment group at Berliner Cohen, LLP. Questions? Please contact Susan by phone at 408.286.5800 and via email at susan.bishop@berliner.com.

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LEVERAGING AUTOMATION AND AI IN THE LEGAL PROFESSION: ENHANCING EFFICIENCY WHILE ENSURING COMPLIANCE

BY VINCE CORRALEJO – SUBMITTED BY SACRAMENTO LPA

Staying ahead in today's rapidly evolving legal landscape means embracing technology advancements that streamline operations and enhance productivity. Automation and Artificial Intelligence (AI) are two innovations reshaping how legal professionals work, offering benefits from improved efficiency to enhanced client experiences and more. Here, we explore the tangible benefits of integrating automation and AI into the legal sphere, focusing on the pivotal role of data governance and compliance in adopting these groundbreaking tools.

Automation: Streamlining Day-to-Day Operations

Automation has emerged as a game-changer for law firms, offering solutions to tedious and time-consuming tasks that once bogged down productivity. From automated billing and timekeeping to generating retainer agreements, the benefits are manifold:

Enhanced Efficiency: By automating repetitive tasks, legal professionals can focus their energy on higher-value activities, leading to increased productivity and better client service.

Reduced Errors: Automation minimizes the risk of human error inherent in manual processes, ensuring accuracy and reliability in crucial tasks such as billing and documentation.

Improved Compliance: Compliance is a cornerstone of the legal profession, and automation helps ensure adherence to regulatory standards by reducing the likelihood of oversights or inconsistencies.

AI: Shaping the Future of Legal Practice

AI technologies are revolutionizing the legal industry, offering predictive analytics, enhanced customer experiences, and unprecedented insights. Here's how AI is reshaping legal operations:

Optimized Decision-Making:

AI-powered predictive analytics provide legal professionals valuable insights into case outcomes, helping them make informed decisions and devise winning strategies.

Enhanced Customer Experience:

AI-driven chatbots and virtual assistants improve client interactions by providing instant responses to inquiries, scheduling appointments, and delivering personalized services.

Data-Driven Insights: AI algorithms analyze vast amounts of data to uncover patterns and trends, empowering legal teams to extract actionable insights and anticipate future developments.

Streamlined Processes: From automating claims processing to overhauling search engine marketing, AI streamlines processes across the legal spectrum, driving efficiency and cost savings.

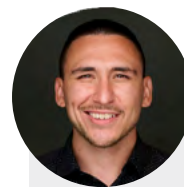
Data Governance: Ensuring Compliance and Security

While AI's potential benefits are vast, it's crucial for legal professionals to prioritize data governance and security. Before adopting AI tools, firms must establish robust systems to safeguard sensitive information and ensure compliance with regulatory requirements. Data governance encompasses policies, procedures,

and controls designed to protect data integrity and privacy, mitigating risks associated with AI implementation.

Automation and AI present unparalleled opportunities for legal professionals to enhance efficiency, improve client experiences, and drive innovation. However, success in adopting these technologies hinges on careful consideration of data governance principles and compliance requirements. By embracing automation and AI while prioritizing data integrity and security, law firms can confidently navigate the evolving landscape, positioning themselves for sustained success in the digital age.

As the legal profession continues to evolve, embracing automation and AI is no longer optional but imperative for staying competitive. By leveraging these technologies effectively while ensuring robust data governance practices, legal professionals can unlock new levels of efficiency, innovation, and client satisfaction. As we look to the future, the integration of automation and AI will undoubtedly redefine the practice of law, empowering professionals to deliver exceptional value in an increasingly digital world.



VINCE CORRALEJO is the Business Development

Manager at Rize Technologies. For the last two decades, Rize Technologies' team has been providing IT services specifically to law firms of all sizes. To reach Vince: Phone: (916) 536-6989; Email: vcorralejo@rizetechnologies.com.

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30 DAYS BEFORE TRIAL: IT'S ALL ABOUT TEAMWORK

BY ELISE DRESSER, CCLS & JESSICA TE – SUBMITTED BY SANTA CLARA COUNTY LPA

Trial is fast approaching. With 30 days left before the starting date, how will you accomplish all the tasks that remain? It's time to work together and utilize your support staff to get you successfully through the final push to trial.

30 days until trial

- Schedule regular meetings with your trial team. Your trial team will include all attorneys, paralegals, legal assistants, and records staff working on the case. Hammer out the details of everyone's involvement, determine who is responsible for each task, and agree on a game plan that provides the best support.
- Decide which documents to include in your trial binders. These may include notices to appear, subpoenas, witness charts, deposition summaries, witness examination outlines and exhibits, a trial brief, jury instructions, and other documents specific to your case.
- Monitor the court docket and check the website for court updates.
- Finalize your support staff, which will consist of legal assistants, paralegals, and records staff. Also, consider the vendors, witnesses, and jury consultants that you'll need for your case, if necessary. Provide plenty of advance notice about deadlines and trial dates.
- Decide who the main point of contact will be on your support staff. This person will receive instructions and tasks from the attorneys at the courthouse. They will need to coordinate and distribute those tasks to the rest of the support staff at the office.
- Courtroom configurations. Scout the courtroom layout, determine what equipment is available, and find out if the judge has any specific standing orders regarding trial procedures. Contact the courtroom clerk and schedule a day to visit the courtroom. Introduce yourself to the courtroom clerk, court reporter, and bailiff. These individuals are crucial to ensuring smooth operations in the courtroom. Exchange contact information, if possible.
- Ask questions about your specific court. There may be details you need to know about the courtroom that may not be in the local rules or in the judge's standing rules. Courtroom staff are a valuable source of information about judges and their specific preferences. Consider asking the following questions:
 - » What courtroom idiosyncrasies should you be aware of?
 - » What is the courtroom's daily trial schedule?
 - » What is the procedure for requesting a transcript of the day's proceedings?
 - » Can you deliver equipment or store items in the courtroom?
 - » Will someone in the courtroom help set up laptops and other devices?
 - » Confirm that the courtroom can interface with your devices.
- Exhibit and witness binders. Know how many copies the court will need and what method you'll use to label documents. Always make a master copy of trial and exhibit binders for support staff and keep extra copies at the office.

- Meet regularly with your IT team to discuss equipment needed for trial, which may include laptops, projectors, hot-spot devices, and more. If needed, assist with setting up the equipment on the day of trial.

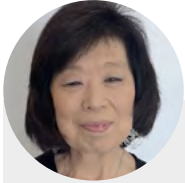
The legal assistants and paralegals on your team can assist with the following tasks:

- Have vendors on standby to copy trial binders, exhibits, display boards, and electronic demonstratives, and to deliver them to the courthouse, etc.
- Ensure that court reporters are ready and available for the duration of the trial. Be sure to confirm available dates and times, and payment preferences, with court reporters.
- Prepare standby or on-call letters to witnesses.
- Confirm transportation, hotel accommodations, and a remote office space for attorneys, support staff, clients, witnesses, experts, vendors, and/or jury consultants. Be aware of cancellation policies and be alert to any possible changes. Research hotels near the courthouse and make reservations several months in advance. If you have local co-counsel, work with them when finalizing logistics.

As time slips away, new sets of deadlines and to-do items will arise. Learn how you can prepare during the last two weeks days before trial in the final blog of this series, "14 Days Before Trial: The Home Stretch."

In case you missed it, check out our previous article about preparing sixty days before trial: "60 Days Before Trial: Ready, Set, Go!"

Continued on page 15 →



ELISE DRESSER, CCLS is a legal assistant for the McManis Faulkner civil litigation and employment law teams. With over 30 years of experience as a civil litigation assistant, Elise is proficient in civil procedure, calendaring and docketing, and is familiar with state, federal, and local rules. She is also a long-time active member of Santa Clara County Legal Professionals Association (SCCoLPA) and Legal Professionals Incorporated (LPI), Elise currently serves as LPI’s Parliamentarian and Vice President for SCCoLPA. In addition, she is a California Certified Legal Secretary (CCLS) and served as the past Chair of the CCLS Certifying Board and past assistant editor of the Publication Revisions Committee.



JESSICA TE is a member of McManis Faulkner’s marketing team and assists the firm in its outreach efforts as Marketing Coordinator. She is responsible for crafting, tracking, and implementing marketing strategies regarding client development, social media, and public relations. She also works in a supportive role, promoting the individual business development objectives of McManis Faulkner attorneys.

Dates to Remember | 2024

MAY 14, 2024

LPI University – Advanced Discovery Online Class
(Commences 5/14 – 6/25)
By NextGen Legal (Details on LPI’s website)

MAY 14, 2024

LPI University – Appellate Procedures in California and the Ninth Circuit Court of Appeals Online Course
(Commences 5/14 – 7/9)
By NextGen Legal (Details on LPI’s website)

MAY 14, 2024

LPI University – Trial Preparation Online Class
(Commences 5/14 – 7/9)
By NextGen Legal (Details on LPI’s website)

MAY 14, 2024 | 12:00 P.M. – 1:00 P.M.

Legal Technology Training – PowerPoint 101
By June Hunter (Details on LPI’s website)

MAY 16-19, 2024

 **LPI’s 90th Annual Conference of Delegates and Board of Governors Meeting – “ALOHA”**
DoubleTree by Hilton, Newark, CA
Co-hosted by LPI and Alameda County LPA

MAY 17, 2024 | 8:30AM-11:45AM

“Speed Mentoring” LPI’s Officer-Chair Workshops at Annual Conference
(In Person Only) (Details on LPI’s website)

MAY 17-18, 2024

Continuing Legal Education and Legal Technology Training Seminars at Annual Conference
(In Person or Via Zoom) (Details on LPI’s website)

MAY 21, 2024 | 12:00 P.M. – 1:00 P.M.

LPI University – Corporate Law (Part 1)
By Bethany Ensz, M.S. (Details on LPI’s website)

JUNE 4, 2024 | 12:00 P.M. – 1:00 P.M.

LPI University – Corporate Law (Part 2)
By Bethany Ensz, M.S. (Details on LPI’s website)



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LEGACIES

(Inspiration Message at LPI February Quarterly Conference)

BY MARY LOU FLOYD, CCLS - SUBMITTED BY MT. DIABLO LPA

I want to talk to you about something that transcends the boundaries of time, something that has the power to outlast us and touch the lives of generations yet to come – legacies.

Leaving a legacy refers to the act of creating a lasting impact or imprint that extends beyond one's current existence. It involves contributing something meaningful and enduring to the world, whether in personal or professional realms. Legacies can take various forms and may include:

- Positively influencing the lives of others
- Sharing wisdom, knowledge, and expertise that benefits future generations
- Passing down values and traditions
- Making contributions to the community or society at large
- Volunteering time and resources
- Teaching others
- Advancing knowledge through educational activities
- Serving as an inspiration for others to follow

Leaving a legacy is often a deliberate and conscious choice. It involves aligning one's actions, values, and contributions with a vision of how one wishes to be remembered. It is a way of ensuring that one's influence persists, making a positive and meaningful difference in the lives of others long after one is gone.

Each one of us is writing a story, a narrative of our existence that goes beyond our individual lifetimes. It's a story that we are creating not just for ourselves, but for the world that will remember us. What kind of story do you want to leave behind? What legacy are you weaving into the fabric of life?

Legacies aren't reserved for the famous or the wealthy; they are for anyone who chooses to live a life of purpose and impact. It's about the mark you leave on the hearts and minds of those around you, the ripple effect of your actions extending far beyond your immediate sphere.

In our LPI family, in 2023, we have lost several people who have left a legacy.

Diane Mecca, Norma Marquez, Shaylene Cortez, Loretta Reib, Jennifer Page, and many others in our families.

Consider the legacies of these women. Their impact wasn't measured merely by their possessions or accolades; it was the imprint they left on LPI, on our educational programs, on the PRC, and on our Executive Board. They not only left a legacy, they made a difference in the lives of others.

Now, let me ask you: What are you building? What are you contributing to the grand tapestry of life? The choices you make, the values you uphold, and the kindness you extend—they all become threads in the legacy you're crafting.

Are you making a lasting and meaningful impact? Are you influencing others to follow their dreams, to fulfill their passions, to create influence that will endure over time?

Remember that a legacy isn't only about what you leave behind; it's also about



what you do in the present. It's about the impact you have today, the positive change you can affect right now.

In a world that sometimes feels tumultuous, remember that you have the power to shape the narrative. You can be the author of a story that uplifts, inspires, and endures. Your legacy is not just about you; it's a gift to the future, a gift to your family, a gift to our thread of life. One person, one life, YOU - can make a profound difference.

So, as you go about your days, consider the legacy you're creating. Be intentional with your actions, embrace kindness, and pursue your passions. The legacy you leave will not only be a reflection of who you were but a guiding light for those who follow.

Reflect for a moment on the light that Diane, Shaylene, Norma, Loretta, Jennifer, and others in our families, have lit for us to follow.

Reflect for a moment on the light that you are shining for others to follow.

Your legacy is not just a gift to the future; it's a guide for those who come after, a source of inspiration to remind

Continued on page 19 →

← Continued from page 18

them that even one life can leave an indelible mark.

Remember, it's not the grandeur of our deeds that defines our legacy; it's the sincerity of our intentions and the impact of our smallest acts. Each smile, each helping hand, each word of encouragement contributes to the legacy we're creating.

In the words of Maya Angelou, "I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel." Let your legacy be a legacy of kindness, of inspiration, of making others feel seen and valued.

Embrace the potential within you to leave a legacy that reverberates through time. Be the author of a story that inspires courage, compassion, and connection. Your legacy lives on in the hearts and minds of those you touch.

Thank you, and may each of you go forth with hope, love, passion, kindness, and beacons of inspiration for generations yet to come.



MARY LOU FLOYD, CCLS has been a paralegal for over 30 years, has a BA in Criminal Justice, and an MS in Psychology. She is an independent contractor paralegal, with experience in family law, probate, estate planning, and civil litigation. She has been a member of Mt. Diablo Legal Professionals Association since 1988, is a past president, and is currently the Parliamentarian. She is also LPI's Continuing Education Coordinator.

Congratulations

TO LPI'S NEWEST CALIFORNIA CERTIFIED LEGAL SECRETARIES!

The CCLS Certifying Board, CCLS Chair and LPI Executive Committee are so proud of the following people who passed the March 16, 2024 California Certified Legal Secretaries exam:

Tammy Cortez - Los Angeles LSA
Melissa Gutierrez – Fresno County LPA
Julie Kennedy – Member-at-Large

Teresa Murphy - Orange County LPA
Marci Nakai - San Francisco LPA
Delia Pedrosa - San Francisco LPA

Lisa Preciado - San Diego LSA

Continued on page 16 →

FEBRUARY 16-18, 2024 | WALNUT CREEK, CALIFORNIA

LPI'S THIRD QUARTERLY BOARD OF GOVERNORS MEETING



At Legal Professional, Inc.'s (LPI's) Third Quarterly Conference on February 16-18, 2024 at Embassy Suites in Walnut Creek, California, the theme was "Hail to the Chiefs" to celebrate LSI/LPI Past Presidents co-hosted by LPI and Mt. Diablo Legal Professionals Association.

The conference started with the Friday night welcome reception which included a Jeopardy-style Presidential Trivia competition and yummy nacho bar. Lots of fun was had by all!

Saturday began with the Board of Governors meeting where all of the Executive Committee member's reports were given during the morning session. Afterwards, several Continuing Legal Education seminars were offered

before the Joint Roundtable Luncheon commenced where the Executive Committee Resume was discussed. After the Luncheon, several more Continuing Legal Education and Legal Technology Training seminars were offered.

At the Saturday evening banquet a presentation was given led by LPI Executive Advisor and former LPI President Lynne Prescott, CCLS to honor and pay tribute to all of our esteemed Past Presidents, with special recognition extended to those present at the event and those joining remotely via Zoom. The atmosphere turned poignant as we commemorated the memory of our late friend and former LSI President, Jennifer L. Page, CCLS.

Sunday started off with Mary Lou Floyd, CCLS giving an inspirational message encouraging us all to consider the legacy we will leave behind. The Board of Governors meeting then reconvened where Governors adopted a motion to bestow LPI Honorary Membership to Lori McElroy from Redroman Creative, the designer of The Legal Professional magazine, who has been working with LSI/LPI for 10 years. A well-served honor! Once business was taken care of and acknowledgments were made, LPI's Third Quarterly Conference was adjourned. The weekend was filled with wonderful opportunities for educational seminars, networking and fun!



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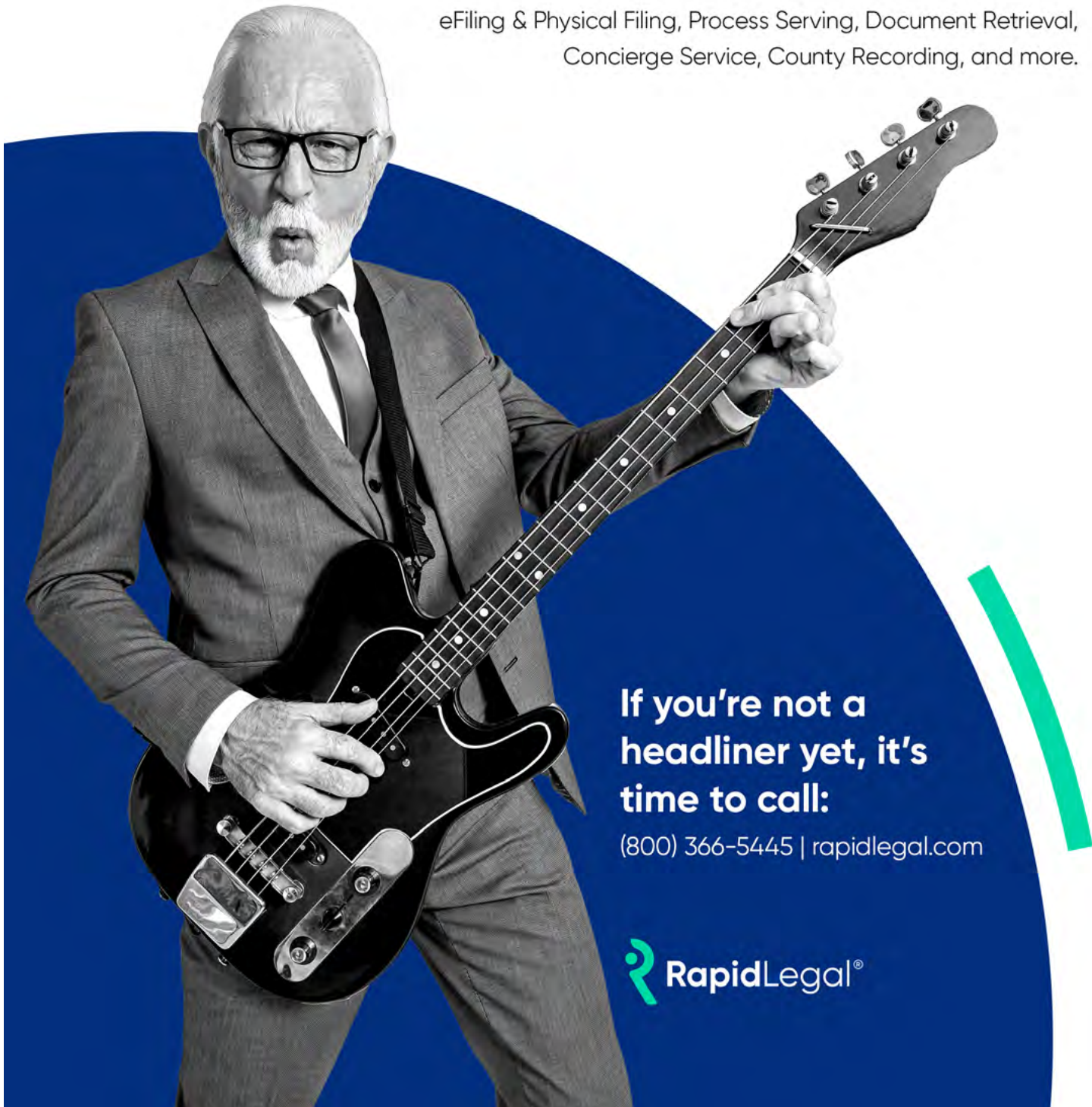
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Solano Superior Court (June 13)

California Court of Appeals - Third Appellate District (June 27)

USDC Southern District (July 25)

Alameda Superior Court (August 22)

Bankruptcy Court Updates (August 29)

AND MORE TO COME!



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STICKY SITUATIONS AND LEGAL SUPPORT STAFF

BY LYNN PRESCOTT, CCLS, LPI EXECUTIVE ADVISOR

Part 5 of LPI's "Back to Basics" series (Final Segment)

Those of us in legal support positions are often asked questions by clients or potential clients that can pose some potentially sticky situations if not handled correctly. Following are some common scenarios/questions and suggested responses should you be faced with one of these sticky situations.

Question: "Do you do such-and-such type of law?"

Why this is a sticky question - - Your may work for a firm that only specializes in a particular practice area; however, you are not in a position to, nor are you authorized to, make a determination as to what type of cases your lawyers may handle. You may work for a firm that handles many different types of law. The same principle still applies.

Suggested Response: "You know, that's a good question. I'm familiar with most of the types of cases we handle but let me do some checking and get back to you if you don't mind. Is there a number where I can call you back in a bit?"

Question: "I don't want to hire a lawyer. I just need a quick answer to a question. Can you help me?"

Why this is a sticky question - - You are being asked to provide information that could be construed as legal advice or providing a legal opinion. You never want to put yourself in the position of someone being able to say, "Well, so-and-so at XYZ Firm told me I should do such-and-such."

Suggested Response: "I'm sorry, but I am not the right person to help you. I'm not an attorney, but I would be happy to set an appointment should you decide you do want to consult with an attorney."

[NOTE: If your firm offers free consultations for certain types of matters, you might mention that if they would like to provide you with a little more information, you can see if there are any complimentary consultation appointments available. If it turns out that your firm declines to offer the free consultation, this is a tactful way to let the caller know you don't have any appointments available.]

Question: "What do you mean, you have a conflict - - what type of conflict?"

Why this is a sticky question: The caller is asking you to disclose information that is confidential. If your office is unable to represent the caller because of a conflict, chances are it's because someone in your office either represented or had some sort of exposure to/interaction with one of the parties named in the conflict check, or perhaps even with the potential client or someone associated with them. Regardless of the reason, you must NEVER disclose the reason for the conflict.

Suggested Response: "The basis for the conflict was not shared with me, and even if it were, I would not be able to share it with you, as that information is considered confidential. However, our attorneys would like to refer you to a couple of other firms you might want to contact to see if they can help you."

Question: "I have been leaving messages, voicemails, and sending emails, but I still have not gotten a call back or response from so-and-so. What do I have to do to get someone to respond to me?"

Why this is a sticky situation:

Unhappy clients can be problematic if they don't feel they are being heard or getting what they pay for. An attorney's lack of response is usually not a deliberate avoidance of the client. Be careful that you do not take on the client's frustration and project that on the offending attorney, especially if you are the one who has been taking all those messages and forwarding all those calls to voicemail. You are likely not aware of the attorney's reasons for the delay in getting back to the client, nor are you expected to make excuses or offer reasons for the delayed response.

Suggested Response: "I do see that you have left several messages for so-and-so. Why don't I take a look at their calendar and see when they've got a free block of time for a telephone/ Zoom appointment? Would that work for you?"

[NOTE: There are certain instances and certain types of law where there can be a real sense of urgency (either real or perceived) and the client truly does need someone to respond as soon as possible. If their attorney is unavailable or unable to respond at the time, check with a managing/senior partner or another attorney who practices in the same area of law to see if they can

Continued on page 27 →

← Continued from page 26

assist or would have a recommendation for the client in the interim.]

Question: "How much do you charge for [fill in the blank]?"

Why this is a sticky situation: An attorney's quote for a consultation, a retainer for services, and the hourly rate they set for certain types of matters are all based on the amount of time and specific legal strategies the attorney feels will be required in order to effectively assist the client.

Therefore, just as each case is unique, so are the fees for each case. Since legal support staff are not qualified to make that determination, neither are they authorized to discuss fees for legal services with clients unless specifically directed to do so by the attorney.

Suggested Response: "That's up to the attorney. Each case is different, so that is something the attorney would discuss with you when you meet with them."



LYNNE PRESCOTT, CCLS, is LPI's

Executive Advisor, and a member of Sacramento Legal Secretaries Association. She first became a member of LPI in 1990 while working as a legal secretary in Fairfield, CA. She is currently employed by the law office of Messing Adam & Jasmine. Lynne is a two-time past president of both Solano County LSA and Sacramento LSA, and obtained her CCLS certification in 2013. She resides in Yuba City with her husband, Randy, and four fur-babies, and is a proud mother and grandmother.



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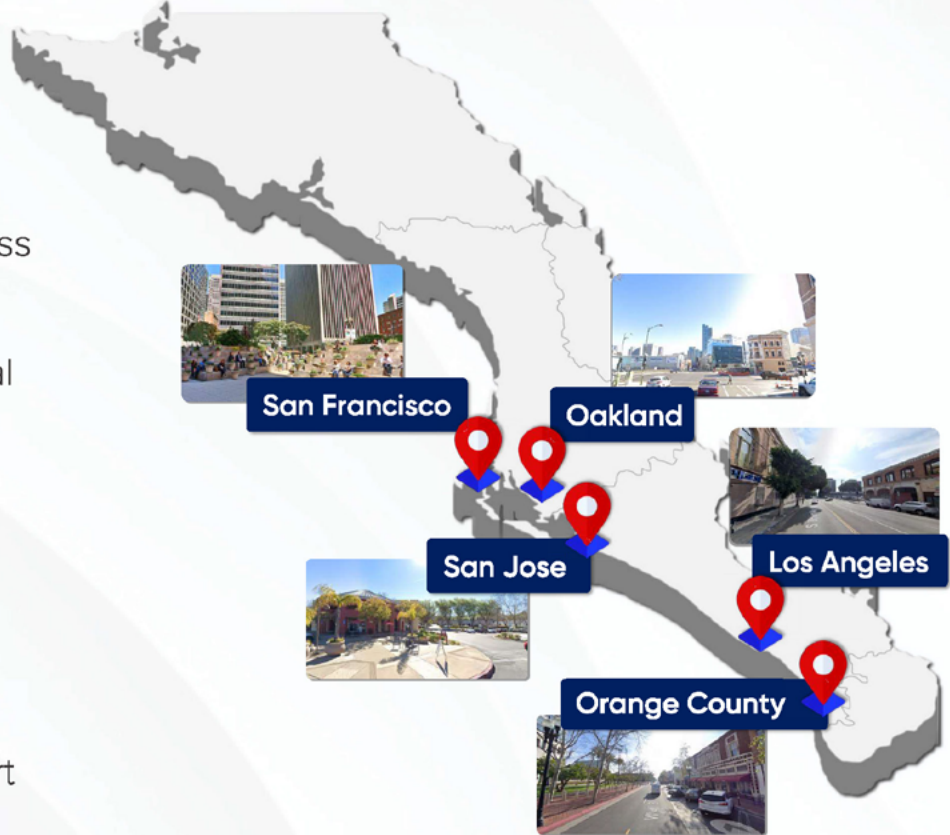
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CCLS QUIZ

Law Office Administration

ALL QUESTIONS ARE TAKEN FROM THE NEW CCLS RESOURCE:

COMPUTERS MADE EASY – FROM DUMMY TO GEEK

1. A firewall is a device to allow or deny certain types of traffic or services from getting into or out of your network.

- True
- False

2. Firewalls can hide your computer's IP address from outside networks or internet by using NAT (Network Address Translation).

- True
- False

3. Firewalls can be hardware or software based, with software being more expensive and more effective.

- True
- False

4. Before clicking on suspicious links in an email, be sure to hover over the link with your mouse to determine if it has been masked to look like something else.

- True
- False

5. Free spyware programs don't work as well as the ones you pay for.

- True
- False

6. Which keystroke combination will display the Start Menu (same as Windows key)?

- a) CTRL+ESC
- b) ALT+ESC
- c) SHIFT+ESC
- d) ALT+ENTER

7. What is the typical size limit of incoming and sometimes outgoing emails?

- a) 20-30 MB
- b) 10-20 MB
- c) 5-10 MB
- d) 40-50 MB

8. If you are shopping on Amazon.com and have things in your cart, then you leave the sight without buying them, go to another sight, then return to Amazon later to find the items still in your cart, this is called:

- a) autofill
- b) cookies
- c) cache
- d) memory

9. Which product is typically NOT included in the Microsoft Office Suite?

- a) Excel
- b) PowerPoint
- c) Word Perfect
- d) Skype

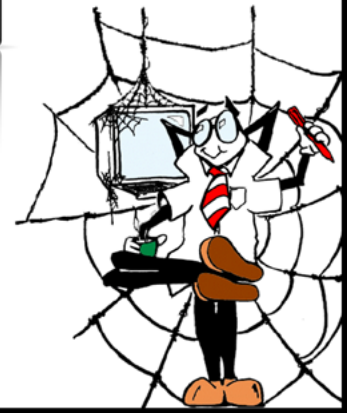
10. How often should the average home computer user back up their computer?

- a) Daily
- b) Weekly
- c) Monthly
- d) Annually



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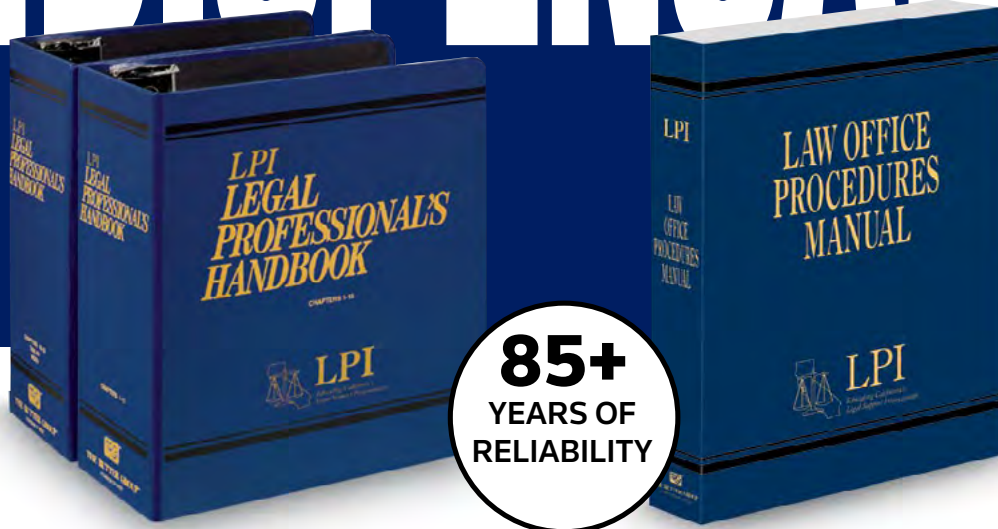
ANSWERS FROM QUIZ ON PAGE 31

**CCLS
QUIZ**

ANSWER KEY

- | | |
|---------------------------------------|--|
| 1. True | 8. B – cookies |
| 2. True | 9. C – Microsoft Suite comes with Word, not Word Perfect |
| 3. False – Hardware is more expensive | 10. B – weekly should be sufficient for the typical home computer user |
| 4. True | |
| 5. False | |
| 6. A – CTRL+ESC | |
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CONTENTS

- Welcome to LPI University 1
- Your Course Tuition Includes 1
- Our Promises To You 1
- Minimum Course Requirements 1
- Instructional Team 1
- Course/Class Schedules 1
- Course Descriptions 1
- Additional Education 1
- On-Demand Library 1
- Publications 1
- Membership at LPI 1

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Jennifer L. Smith, Esq. is a seasoned legal professional with over 15 years of experience in the legal field. She has worked for various law firms and is currently a partner at her own firm. She is passionate about educating and mentoring the next generation of legal professionals.

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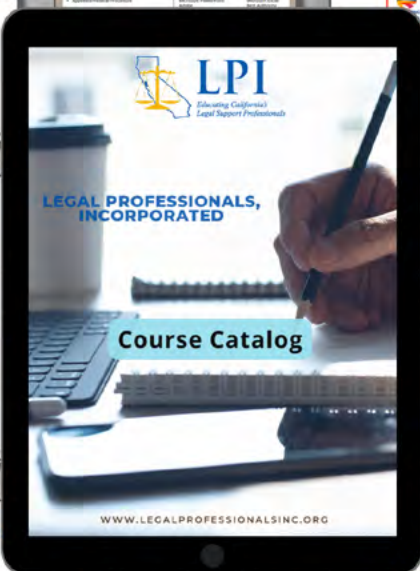
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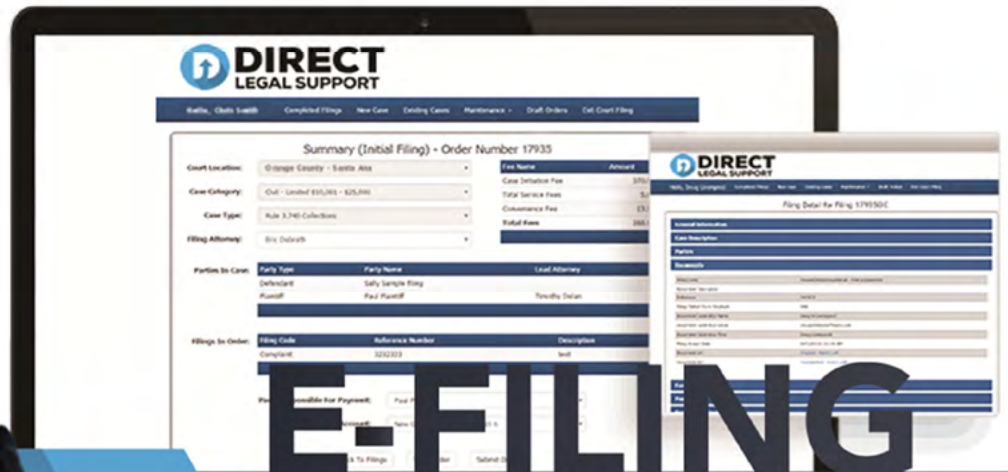
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E-mail: executivesecretary@legalprofessionalsinc.org

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ERIKA GARDUÑO

E-mail: treasurer@legalprofessionalsinc.org

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EXECUTIVE ADVISOR (Nominations and Elections Chair/Marketing)

LYNNE PRESCOTT, CCLS

E-mail: executiveadvisor@legalprofessionalsinc.org

PARLIAMENTARIAN

ELISE DRESSER, CCLS

E-mail: parliamentarian@legalprofessionalsinc.org

EDITOR-IN-CHIEF, PUBLICATIONS REVISION COMMITTEE

(PRC/Education Council)

LINDA LANE, CCLS

E-mail: editorinchief@legalprofessionalsinc.org

EDITOR, THE LEGAL PROFESSIONAL

BARBARA BARREGAR

E-mail: TLPEditor@legalprofessionalsinc.org

EDUCATION DIRECTOR (Education Council/ Marketing)

RENEE EVANS, CCLS

E-mail: educationdirector@legalprofessionalsinc.org

HISTORIAN

SHANNON QUIGLEY

E-mail: historian@legalprofessionalsinc.org

CONTINUING EDUCATION COORDINATOR (Education Council)

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E-mail: cec@legalprofessionalsinc.org

PROFESSIONAL DEVELOPMENT COORDINATOR (Education Council)

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E-mail: pdc@legalprofessionalsinc.org

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LEANNE RUESINK

E-mail: careerpromotions@legalprofessionalsinc.org

CALIFORNIA CERTIFIED LEGAL SECRETARY (Education Council/Marketing)

VIVIAN SHREVE, CCLS

E-mail: cclschair@legalprofessionalsinc.org

EDITOR, THE LEGAL PROFESSIONAL'S HANDBOOK (PRC)

LISA DE LA O

E-mail: lpbeditor@legalprofessionalsinc.org

EDITOR, LAW OFFICE PROCEDURES MANUAL (PRC)

ELIZABETH ADAME, CCLS

E-mail: lopmeditor@legalprofessionalsinc.org

LEGAL PROCEDURE/BLOG EDITOR (Education Council/Marketing)

LARRY MCGREW

E-mail: legalprocedure@legalprofessionalsinc.org

LIAISON TO THE LAW PRACTICE MANAGEMENT & TECHNOLOGY

SECTION OF THE CALIFORNIA LAWYERS ASSOCIATION (Marketing)

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E-mail: lpmtliaison@legalprofessionalsinc.org

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MARY ROCCA, CCLS

Email: legacycurator@legalprofessionalsinc.org

ASSISTANT LEGACY PROJECT CURATOR

HEATHER EDWARDS, CCLS

Email: co-legacycurator@legalprofessionalsinc.org

SCHOLARSHIP (Marketing)

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JANICE WILLIAMS, CCLS

E-mail: assistanttechblog@legalprofessionalsinc.org

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LISA DE LA O

E-mail: lpbeditor@legalprofessionalsinc.org

EDITOR, LAW OFFICE PROCEDURES MANUAL (PRC)

ELIZABETH ADAME, CCLS

E-mail: lopmeditor@legalprofessionalsinc.org

ASSISTANT EDITOR

LIDIA GANDEVIA

E-mail: prcassted7@legalprofessionalsinc.org

ASSISTANT EDITOR

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E-mail: prcassted4@legalprofessionalsinc.org

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