



THIRD QUARTERLY CONFERENCE BINDER

BOARD OF GOVERNORS' MEETING

February 21-23, 2025

HOSTED BY:

**Legal Professionals Incorporated
&
Santa Clara County LPA**



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AGENDA

**Third Quarterly Conference Board of Governors Meeting
February 21-23, 2025
Hilton Santa Cruz/Scotts Valley – Santa Cruz, CA**

**Co-hosted by: Legal Professionals, Incorporated and Santa Clara County
Legal Professionals Association**

SATURDAY, February 21, 2025

CALL TO ORDER (First Session)..... 9:00 a.m.
Donna Day
LPI President
Alameda County LSA

Pledge of Allegiance George Siambis
President
San Mateo County LPA

Code of Ethics* Tanya Tate
Governor
San Mateo County LPA

* Dedicated to the Memory of Joan M. Moore, PLS, CCLS, LSI President 1980-1982

INTRODUCTIONS

ROLL CALL Erika Garduño
LPI Executive Secretary
Riverside LPA

_____ of _____ LSA/LPA
_____ of _____ LSA/LPA

Number Present: _____ Quorum: Yes No

CORRESPONDENCE Erika Garduño
LPI Executive Secretary
Riverside LPA

INTRODUCTION OF TIMEKEEPER Elise Dresser, CCLS
LPI Parliamentarian
Santa Clara County LPA

INTRODUCTION OF PAGE Elise Dresser, CCLS
LPI Parliamentarian
Santa Clara County LPA

APPROVAL OF MINUTES

The Minutes of the August 2024 Board of Governors Conference Meeting have been distributed.

Are there any corrections? Yes No

[] Approved as distributed.
[] Approved as corrected.

The Minutes of the November 2024 Board of Governors Conference Meeting have been distributed.

Are there any corrections? Yes No

[] Approved as distributed.
[] Approved as corrected.

REPORTS OF ELECTED OFFICERS

President Donna Day
Alameda County LSA

Vice President
Membership & Marketing Committee Coordinator Bettina Jacobson
Placer County LPA

Executive Secretary/Programs Erika Garduño
Riverside LPA

Treasurer Larry McGrew
San Francisco LPA

MOTION: The actions of the Treasurer in paying the routine bills of LPI during the third quarter of fiscal year 2024-2025 be ratified.

- Motion carried.
- Motion defeated.

REPORTS OF APPOINTED OFFICERS AND CHAIRS

(The appointed officers and committee chairs listed below will be delivering oral reports. Written reports of all elected officers, appointed officers, and committee chairs are included in the conference agenda binder.)

Executive Advisor/Nominations and Elections Chair Rod Cardinale, Jr.
Santa Clara County LPA

Editor-in-Chief Linda Lane, CCLS
Los Angeles LSA

Education Council Director Renee Evans, CCLS
San Diego LSA

LPI Legal Procedure Chair, LPI Blog EditorChristine Flores, CBA
San Francisco LPA

2025 Annual Conference ChairElizabeth Adame, CCLS
San Diego LSA

UNFINISHED BUSINESS

NEW BUSINESS

ANNOUNCEMENTS

RECESS UNTIL SECOND SESSION, SUNDAY, February 23, 2025 9:00 a.m.

ADJOURNMENT Time: _____ a.m.

ROUNDTABLE LUNCH..... 12:15 p.m. (doors open at 12:00 p.m.)

EXECUTIVE COMMITTEE RESUME DISCUSSION (time approximate) 12:15 p.m.

Executive Secretary Erika Garduño
LPI Executive Secretary
Riverside LPA

SUNDAY, February 23, 2025

INTRODUCTION OF INSPIRATIONAL SPEAKERDonna Day
LPI President
Alameda County LSA

INSPIRATIONAL SPEAKERLynne Prescott, CCLS
Sacramento LPA

CALL TO ORDER (Second Session) (time approximate)9:00 a.m.
Donna Day
LPI President
Alameda County LSA

ROLL CALL Erika Garduño
LPI Executive Secretary
Riverside LPA

_____ of _____ LSA/LPA

_____ of _____ LSA/LPA

_____ of _____ LSA/LPA

Number Present: _____

Quorum: Yes No

INTRODUCTION OF TIMEKEEPER Elise Dresser, CCLS
LPI Parliamentarian
Santa Clara County LPA

INTRODUCTION OF PAGE Elise Dresser, CCLS
LPI Parliamentarian
Santa Clara County LPA

NOTICED MOTIONS/RECOMMENDATIONS Erika Garduño
LPI Executive Secretary
Riverside LPA

UNFINISHED BUSINESS

NEW BUSINESS

ANNOUNCEMENTS

[Please line up at the floor microphone; introduce yourself and what association you belong to.]

President Announcement – The winners of the four (4) scrip tickets to the 91st Annual Conference, May 15-18, 2025 hosted by San Diego LSA to be held in El Cajon, CA at the Sycuan Casino Resort in El Cajon, California, are: ***(please note we removed the 4 previous winners from this drawing)***

- 1. _____ LSA/LPA
- 2. _____ LSA/LPA
- 3. _____ LSA/LPA
- 4. _____ LSA/LPA

ADJOURNMENT

Time: _____ a.m.

**LPI’s 91st Annual Conference May 15-18, 2025
Sycuan Casino Resort, El Cajon, CA
Hosted by: San Diego Legal Secretaries Association**



OFFICE OF: PRESIDENT
DONNA L. DAY
E: PRESIDENT@LEGALPROFESSIONALSINC.ORG

January 27, 2025

PRESIDENT'S THIRD QUARTER REPORT

Happy New Year everyone! As we dive into 2025 and look to the future with goals, planning and setting up our expectations, I want to reflect on where we have been so we can plan our next adventure – with LPI! I am so proud of all of the LPI members – and all of you who continue to promote our educational classes and support the membership benefits. That is how we continue to grow and your leadership team is always proving they are looking to our future and continuously working on this organization's strategic priorities.

As I write this report, I have to take a moment to send my thoughts and prayers to all of our Southern California folks who have been affected by the many devastating fires. It reminds me to be thankful and humble and to BE KIND to everyone – you never know what a simple gesture, or donation, or even a helping hand might be to someone. I think to when I am in church and we turn to our neighbor or person behind us and shake hands saying “Peace be with you” – I am extending my hand with love to all of you, your families, co-workers, and friends.

You will hear from our Vice President about our new Sponsorship Program we are putting together to enhance our partnerships and relationships with our vendors and sponsors. This is very important to each one of us as we rely heavily on the expertise and support from these vendors. I couldn't do my job effectively without them – when I need my documents e-filed and delivered to the courts, or I need a subpoena and documents produced. I even provided a co-worker with a recommendation for a translator simply because I had a coffee mug from one of our LPI vendors (TransPerfect) and they have become a reliable source for translations. And what about court reporters – how many of us have been asked to get a court reporter with less than 24 hours notice? I can tell you from experience that knowing that I have many options to choose from, I have been able to go to LPI vendors for support and they have ALWAYS pulled through for me. So I encourage you all to stop by and have conversations with our vendors, take home some of the cool swag and have it ready for the next time your attorneys come to you in a panic and you can say – “I got you covered”! We need this support every day in our offices – so take the time to say thank you and remember to utilize their services.

We are continuing to look to you the members and collecting information and data to determine if continuing to have four (4) conferences per year is viable. Many of you have been contacted by our Ad Hoc Committee to join in this conversation and you have responded to our surveys on this topic. There will be zoom meetings set up to attend and I encourage you all to let us know your opinion. I am so thrilled that some of our Local Associations are thriving and continue to see growth in the membership and having successful events and programs. We will continue to support and promote this while

realizing there are some associations not having meetings or able to sustain events. I encourage the struggling associations to partner up with others and combine efforts as you are not alone and we all share the same goals – furthering our education – continuing to network – and sustaining our growth both professionally and personally. I continue to meet with the Presidents of the Local Associations to brainstorm and share ideas on how we can further support each other and provide our members with what they are looking for. We are all in this together – we are all on our journeys! So, while we continue on this journey and provide respect and honor the past, we must look to the future and what that will look like for LPI.

Sincerely,



Donna L. Day
LPI President



OFFICE OF: VICE-PRESIDENT
BETTINA JACOBSON
E: vicepresident@legalprofessionalsinc.org

Membership and Marketing – Third Quarterly Report – February 2025

Welcome back to Scotts Valley and LPI's Third Quarterly Conference!

First, let's talk about Membership! Our current Membership is 1049, which includes 947 local association members, and 102 MALs. This time last year, our numbers were slightly higher at 1080. The current MAL's roster is attached to my report.

The Education Team is updating the Legal Professionals Handbook, which you can purchase from Amazon. Once that publication is updated, I will be updating the Member Packet. Did you notice that I called it the Member Packet, not the New Member Packet? I would encourage each association to send the Member Packet out at the beginning of each fiscal year and then once more later in the year. The Education Team will update the Legal Professional Handbook twice a year, which means the Member Packet will also be updated. Plus, sending it out reminds the members of everything that comes with their LPI membership.

Ok, now on Marketing! President Donna and Executive Advisor Rod attended Santa Maria LPA's Annual Christmas Luncheon in December. I was sorry to miss it, but I understand they had many visitors at their booth. President Donna and I attended Sacramento's LPA's Annual Court update in January. Over 150 local legal professional attended their event. Donna and I enjoyed chatting with the attendees and handing out LPU flyers. Renee and others have continued their efforts to engage with various ALA (Association of Legal Administrators). We are still building the list of the top 100 law firms and hope to get the marketing campaign out soon. All of these marketing events and efforts are showing positive results in the number of attendees at our educational programs.

The big project the Marketing team has been working on is our new Sponsorship program. Think of our advertising program but bigger and better. The marketing team needs your help; if you have advertisers within your local area who might want to advertise or be sponsors, please forward their contact information to Heather Czuleger-Nowak. We plan to roll out our new LPI Sponsorship program at the May Pre-Board of Governors meeting.

Please let me know if you have any suggestions or comments on how we can share LPI with others.

I look forward to seeing you all at conference in a few weeks.

Sincerely,

Bettina Jacobson

Bettina Jacobson
LPI Vict President

Cc: Donna Day, LPI President



OFFICE OF: EXECUTIVE SECRETARY
ERIKA GARDUÑO
E: EXECUTIVESECRETARY@LEGALPROFESSIONALSINC.ORG

February 6, 2025

THIRD QUARTER - PROGRAMS REPORT

Welcome to the enchanting world of LEGAL PROFESSIONALS INCORPORATED, a universe brimming with education, networking, commodity, and professional growth! At this conference, the theme is Harry Potter and if you are planning to attend do know that we could have some drizzling of mystery and fun. Looking forward to this conference in Santa Cruz, California.

In the event that you have not had the chance to navigate our website, please note that many of our local associations are still hosting educational and networking events. Here is the link [Local Association Events - Legal Professionals, Inc. - LPI : Legal Professionals, Inc. – LPI.](#)

At-A-Glance of upcoming events

- 2/24 [San Diego LSA](#): Federal Court's Annual Update
- 2/25 [San Francisco LPA](#): Trump 2.0 Immigration Updates
- 2/28 [San Diego LSA](#): Lunch & Learn - Federal Court Trials: What To Do Before Trial
- 3/5 [Contra Costa County LPA](#): Recent Updates in Probate/Estate Planning for the Legal Professional
- 3/28 [San Diego LSA](#): Lunch & Learn - Civil Subpoenas For California State Courts and U.S. District Courts

If your association is not holding any meetings, please consider attending events hosted by other associations. Our web page is constantly modified, and I strongly suggest visiting the link at least once a week.

I look forward to seeing many of you in a few weeks.

Erika Garduño
LPI Executive Secretary

cc: Donna Day, LPI President

February 7, 2025

Third Quarter Treasurer's Report

Dear Members of Legal Professionals Incorporated (LPI),

As we close the chapter on 2024 and the third quarter, we acknowledge that the holiday months presented some challenges, with revenue coming in slower than anticipated. However, we ended the quarter on a strong note, with January's revenues showing significant improvement.

On a more somber note, I would like to extend my thoughts and prayers to those affected by the recent wildfires in Southern California, particularly in the Los Angeles area. Please know that we are here to support you during this most difficult of times. Our recent theme of years passed holds true, we are **Stronger Together**.

Here are some highlights of the actions of the Treasurer this past quarter:

1. **Audit** – The books for 2022-2023 have been completed. Our books for 2023-2024 are under review currently. The process should be completed by the end of our fiscal year.
2. **CD1 High Yield Account** – Our CD2 account with LiveOak matured on February 6, 2025. We chose to let it continue with LiveOak Bank at 4.30% for another 12 months.
3. **Moving our Checking Account** – We are in the process of moving our Business Checking as well as establishing a Business Savings with 3.7% interest with LiveOak Bank.

Lastly, attached please find the following LPI Financial Reports for the 2nd Quarter of FY 2024-2025:

- Summary of Revenue and Expenses
- Chart of Assets
- Education Council Snapshot
- CCLS Certifying Board Income/Expenses
- EC Officer Visitation Expenses
- Corporate Office Expenses

- Summary of Cash Balances
- LPI Members (as of January 31, 2025)
- Adopted Budget 2024-2025

If anyone has any questions or need assistance, please don't hesitate to reach out to me directly.

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "Larry McGrew", with a long, sweeping flourish extending to the right.

Larry McGrew
Treasurer 2024-2026
Legal Professionals Incorporated (LPI)

cc: LPI President, Donna Day

Encl.: noted

LEGAL PROFESSIONALS INCORPORATED
SUMMARY OF REVENUE AND EXPENSES - AS OF JANUARY 31, 2025

INCOME	THIRD PERIOD 11.01.24 - 1.31.25	SECOND PERIOD 08.01.24 - 10.31.24	FIRST PERIOD 05.01.24- 7.31.24	YTD 1.31.2025	BUDGET 2024-2025
400 - NSF Charge Income	0	0	0	0	50
402 - Per Capita	5,554	11,641	27,531	44,726	64,250
402.01 - Per Capita	3,302	9,080	22,770	35,152	50,000
402.02 - MAL	1,355	1,425	3,463	6,243	11,250
402.03 - LPI Local Association Membership	896	1,136	1,298	3,330	3,000
404 - CCLS Income	1,060	1,015	630	2,705	3,500
404.04 - CCLS Exam Fees	845	540	580	1,965	2,500
404.05 - CCLS Recertification Fees	215	475	50	740	1,000
406 - CEC Income	32,607	20,926	34,102	87,635	147,110
406.01 - On-Line BLS Training Course	7,206	7,806	9,870	24,882	30,000
406.03 - On-Line State Discovery Course	750	150	1,550	2,450	1,200
406.05 - CCLS On-Line Study Group	1,260	0	1,157	2,417	3,000
406.06 - On-Line Advanced Discovery Course	2,700	900	1,625	5,225	7,500
406.07 - NextGen Webinars	1,340	1,860	2,135	5,335	6,000
406.08 - CCLS Study Kit	100	0	200	300	1,200
406.09 - CCLS Study Guide	75	25	75	175	100
406.10 - LSRG	843	290	120	1,253	600
406.12 - Online Trial Preparation Course	3,100	375	3,900	7,375	19,000
406.13 - CCLS Legal Terminology (LT)	0	0	0	0	15
406.14 - CCLS Skills (SK)	0	15	0	15	0
406.15 - Ability to Communicate Effectively (ACE)	0	0	0	0	15
406.16 - Law Office Administratiobn (LOA)	0	0	0	0	15
406.17 - Legal Coputations (LC)	0	15	0	15	15
406.18 - June Hunter	2,700	1,970	2,592	7,262	8,000
406.19 - Online Advanced Legal Professional Train	550	0	0	550	22,400
406.20 - Online Intermediate LPT Course	475	1,588	6,475	8,538	24,250
406.21 - Webinars on Demand	2,335	804	425	3,564	2,600
406.22 - Ed. Council Webinars - Non-Members	1,412	1,738	773	3,923	2,900
406.23 - Ed. Council Webinars - Members	3,683	1,035	435	5,153	100
406.24 - Bethany Enszt	1,277	1,555	810	3,642	9,200
406.25 - Appellate/Federal Procedure Course	2,800	800	1,300	4,900	8,000
406.26 - Health Challenge	0	0	660	660	1,000
408 - Royalty Income	0	40,397	15,688	56,085	70,865
408.01 - LPH	0	19,549	0	19,549	35,200
408.02 - LOPM	0	9,992	119	10,111	15,665
408.03 - Other Royalty	0	0	0	0	0
408.04 - LPH Digital Royalties	0	10,856	15,569	26,424	20,000
409 - Advertising	0	0	750	750	7,500
409.01 - The Legal Professional	0	0	500	500	3,750
409.02 - Website	0	0	250	250	3,750
410 - Interest Income	833	909	898	2,640	3,500
411 - Miscellaneous Income	2,690	298	18,782	21,770	20,000
411.01 - Sales of Pub/Subs.	0	0	0	0	0
411.02 - Misc. Income - Other	0	30	0	30	0
411.03 - Misc. Income - Donation to LPI	0	0	18,537	18,537	14,000
411.04 - Misc. Income - Sponsorships	2,500	0	0	2,500	0
411.06 - Online Order Convenience Fee	190	268	245	703	1,000
411.07 - Joint Venture Income	0	0	0	0	5,000
416 - Scholarships	0	0	0	0	0
SUBTOTAL OF INCOME	42,744	75,186	98,381	216,311	316,775
INCOME	THIRD PERIOD 11.01.24 - 1.31.25	SECOND PERIOD 08.01.24 - 10.31.24	FIRST PERIOD 05.01.24- 7.31.24	YTD 7.31.2024	BUDGET 2024-2025
SUBTOTAL OF INCOME FORWARD	42,744	75,186	98,381	216,311	316,775
421 - Jewelry	0	0	60	60	800
421.01 - CCLS Jewelry	0	0	0	0	800
421.02 - Jewelry	0	0	60	60	0
425 - Marketing Items	237	276	1,208	1,721	2,600
425.03 - LPI Pens	0	10	28	38	50
425.09 - Printify Store	45	0	114	159	500
425.11 - Misc. Marketing Items	192	266	798	1,256	1,000
425.12 - LPI Polo Shirt	0	0	21	21	1,050
425.13 - LPI Totes	0	0	248	248	0
437 - Membership Promo/Contest	0	0	0	0	0
439 - Shipping & Handling	0	0	268	268	100
442 - Subsidy Reimbursement	0	0	0	0	1,000
453 - New Charter Association*	0	0	0	0	5
480 - LPI Conference Income	13,869	19,671	19,050	52,590	58,500
480.01 - Registration	8,244	10,459	9,800	28,503	35,000
480.02 - Meals	1,275	550	440	2,265	2,000
480.03 - Donations	800	0	3,075	3,875	6,000
480.04 - Sponsorship	0	900	0	900	0

SUMMARY OF REVENUE AND EXPENSES - 2024-2025

[RETURN TO TOC](#)

LPI 2025 Third Quarterly Conference
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LEGAL PROFESSIONALS INCORPORATED
SUMMARY OF REVENUE AND EXPENSES - AS OF JANUARY 31, 2025

480.05 - Vendor	1,950	3,600	3,300	8,850	10,000
480.06 - Non Legal Vendor	550	0	500	1,050	1,500
480.07 - Opportunity Drawing	1,050	4,162	1,935	7,147	4,000
TOTAL INCOME	56,850	95,132	118,968	270,950	379,780
EXPENSES	THIRD PERIOD 11.01.24 - 1.31.25	SECOND PERIOD 08.01.24 - 10.31.24	FIRST PERIOD 05.01.24- 7.31.24	YTD 7.31.2024	BUDGET 2024-2025
501.01 LPI Local Association Dues	1,340	1,255	1,540	4,135	3,000.00
502 - Publications Revision Committee	4,030	0	4,735	8,765	20,325
502.01 - Operating Expenses	1,659	0	59	1,718	2,750
502.02 - Annual Conference	0	0	4,459	4,459	6,000
502.03 - Quarterly Conference	2,371	0	217	2,588	9,075
502.04 - Training Retreat		0	0	0	2,500
503 - Annual Conference	0	0	1,936	1,936	2,120
503.01 - Bulletin Contest*	0	0	175	175	225
503.02 - History Book Contest*	0	0	0	0	150
503.03 - Membership Contest*	0	0	400	400	500
503.04 - Officer Installation*	0	0	106	106	160
503.05 - Scrapbook Contest*	0	0	35	35	35
503.06 - Certificate of Awards	0	0	1,020	1,020	650
503.07 - AV Equipment	0	0	0	0	0
503.08 - Chapter Achievement Contest	0	0	200	200	400
505 - <i>The Legal Secretary</i>	2,193	29	1,628	3,850	5,960
505.02 - TLS Postage	101	0	180	280	275
505.03 - TLS Production	2,092	29	1,449	3,569	5,685
507 - CCLS Expense	0	0	106	106	0
507.07 - CCLS Expenses			106	106	0
508 - CCLS Certifying Board	0	0	272	272	3,900
508.01 - Attend Meetings	0	0	0	0	3,000
508.02 - Postage/UPS	0	0	58	58	0
508.04 - Printing/Duplicating	0	0	0	0	0
508.06 - Supplies	0	0	215	215	500
508.10 - Other Cost	0	0	0	0	400
509 - History Book*	0	0	0	0	600
511 - Officer Expenses (Elected & Appointed)	10,261	12,572	9,775	32,607	37,750
511.01 - President's Expense	876	2,142	1,392	4,411	3,450
511.02 - Vice President Expense	997	847	1,493	3,337	4,450
511.04 - Executive Secretary Expense	1,122	1,218	1,434	3,774	3,750
511.05 - Treasurer Expense	1,236	914	1,543	3,692	4,200
511.06 - Parliamentarian Expense	762	1,073	690	2,524	3,450
511.07 - Executive Advisor Expense	892	1,188	1,843	3,923	3,450
511.08 - Appointed Officers Expense	4,375	5,191	1,380	10,946	15,000
512 - President's Expense*	0	0	0	0	2,000
513 - Legal Fees and Costs	149	288	529	966	1,050
513.01 - Legal Fees	144	288	504	936	1,000
513.02 - Statement of Information Fee	5	0	25	30	50
514 - Chairmen Expense	3,494	8,774	16,918	29,186	20,000
514.01 - Quarterly Conference	3,494	8,774	847	13,116	14,000
514.02 - Annual Conference	0	0	15,660	15,660	6,000
514.03 - Chairman Expense - other	0	0	410	410	0
517 - Officer/Chairmen Operating Expense	300	292	1,113	1,704	1,800
517.01 - President's Op Expense	0	135	119	254	150
517.02 - Vice President Op Expense	0	156	299	456	150
517.04 - Exec. Secretary Op Expense	0	0	0	0	500
517.05 - Treasurer Op Expense	300	0	694	994	1,000
517.06 - Parliamentarian Op Expense	0	0	0	0	0
517.07 - Exec. Advisor Op Expense	0	0	0	0	0
517.08 - Chairmen Op Expense	0	0	0	0	0
517.09 - Apptd Ofc's Op Expense	0	0	0	0	0
SUBTOTAL OF EXPENSES	21,766	23,210	38,551	83,527	98,505

LEGAL PROFESSIONALS INCORPORATED
SUMMARY OF REVENUE AND EXPENSES - AS OF JANUARY 31, 2025

EXPENSES	THIRD PERIOD 11.01.24 - 1.31.25	SECOND PERIOD 08.01.24 - 10.31.24	FIRST PERIOD 05.01.24- 7.31.24	YTD 7.31.2024	BUDGET 2024-2025
SUBTOTAL OF EXPENSES FORWARD	21,766	23,210	38,551	83,527	98,505
518 - General Printing	0	0	0	0	1,350
518.02 - LPI Roster	0	0	0	0	1,350
518.04 - New Member Welcome Pakcet	0	0	0	0	0
520 - Insurance and Bond	73	2,916	3,720	6,709	10,510
520.01 - Directors & Officers Liability	0	0	0	0	4,560
520.02 - Commercial Liability (Premises)	73	0	3,720	3,793	3,500
520.03 - Bond (Dishonesty)	0	447	0	447	550
520.05 - Media Liability Insurance	0	2,469	0	2,469	1,900
521 - Scholarship/Career Promotion	0	0	6,000	6,000	9,000
521.25 - 2024-2025 Scholarships	0	0	6,000	6,000	9,000
522 - Miscellaneous Expense	2,930	2,542	3,901	9,373	11,458
522.01 - President's Memento	0	0	320	320	0
522.02 - Expense Other	0	0	0	0	450
522.03 - Dues & Subscriptions	2,333	1,884	1,430	5,647	4,000
522.04 - Legacy Project	597	658	1,751	3,006	3,108
522.05 - First Legal Conference Table Expense	0	0	0	0	0
522.06 - Interim Training Meeting/EC Retreat	0	0	400	400	3,900
524 - Accounting	3,435	563	1,725	5,723	2,500
524.01 - Bookkeeper	225	563	75	863	900
524.02 - CPA	2,760	0	1,650	4,410	1,500
524.03 - Audit	450	0	0	450	100
525 - Corporate Office	6,010	5,768	1,152	12,931	26,500
525.02 - Attend Meetings	0	0	0	0	0
525.03 - Postage/UPS/Fed Ex	10	0	16	26	500
525.04 - Telephone	0	321	136	457	1,000
525.06 - Storage	0	447	0	447	0
525.09 - Supplies	0	0	0	0	0
525.12 - Photocopy	0	0	0	0	0
525.13 - Mileage	0	0	0	0	0
525.16 - LPI Administrator	6,000	5,000	1,000	12,000	25,000
526 - Continuing Education Council	10,812	12,060	12,988.37	35,861.02	88,020
526.02 - CEC Operating Expenses	0	0	0	0	300
526.03 - CEC Attend Conference	3,072	0	445	3,516	25,000
526.05 - Speakers' Gifts	0	335	0	335	250
526.06 - On-Line BLS Training Course	3,103	4,025	4,456	11,584	15,000
526.07 - On-Line State Discovery Course	291	291	662	1,244	600
526.09 - CCLS On-Line Study Group	373	0	484	857	1,200
526.10 - Officer/Chairman Workshop	0	0	0	0	0
526.11 - NextGen Webinar Class Fee	974	776	2,060	3,810	3,600
526.12 - CCLS Study Kit	0	0	0	0	0
526.13 - CCLS Study Guide	0	0	0	0	0
526.14 - LSRG	0	0	0	0	0
526.17 - Online Trial Preparation	655	655	1,834	3,144	11,400
526.18 - Online Advanced Discovery	393	582	756	1,731	4,500
526.19 - June Hunter	744	1,008	997	2,749	4,000
526.20 - Online Advanced LPT	0	0	0	0	6,400
526.21 - Online Intermediate LPT Course	-108	2,245	240	2,376	6,250
526.22 - Appellate/Federal Procedure Course	815	990	233	2,037	4,800
526.24 - Bethany Ensiz	501	491	822	1,814	4,600
526.25 - NextGen Postage	0	0	0	0	120
526.27 - Health Challenge Expense	0	663	0	663	0
SUBTOTAL OF EXPENSES	45,027	47,059	68,037	160,123	247,843
EXPENSES	THIRD PERIOD 11.01.24 - 1.31.25	SECOND PERIOD 08.01.24 - 10.31.24	FIRST PERIOD 05.01.24- 7.31.24	YTD 7.31.2024	BUDGET 2024-2025
SUBTOTAL OF EXPENSES FORWARD	45,027	47,059	68,037	160,123	247,843
527 - Officer Visitation	1,728	957	226	2,911	6,000
528 - Subsidy Payment	0	0	0	0	1,000
531 - New Association Development	0	0	0	0	200
531.01 -New Association Development	0	0	0	0	0
531.02 - New Association Charter*	0	0	0	0	200
531.03 - New Assoc Gov-Attend Qrtly Conf	0	0	0	0	0
535 - Membership Promo Contest	0	0	0	0	0
539 - Jewelry	0	0	0	0	0
539.01 - CCLS Jewelry	0	0	0	0	0
539.02 - LPI Jewelry	0	0	0	0	0
540 - Marketing	4,469	8,477	6,887	19,834	21,800
540.01 - Web Master	4,136	3,906	4,140	12,182	13,000
540.02 - Brochures	0	0	0	0	0
540.05 - Marketing Table	0	0	617	617	750
540.07 - Marketing Events	294	4,334	2,043	6,671	5,500
540.12 - Printify Store	39	237	88	364	1,000

SUMMARY OF REVENUE AND EXPENSES - 2024-2025

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LPI 2025 Third Quarterly Conference
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LEGAL PROFESSIONALS INCORPORATED
SUMMARY OF REVENUE AND EXPENSES - AS OF JANUARY 31, 2025

540.13 - LPI Pens	0	0	0	0	0
540.15 - LPI Polo Shirt	0	0	0	0	1,050
540.16 - Social Media	0	0	0	0	500
553 - Officer/Chairmen Workshop	0	0	0	0	0
555 - President's Roundtable	0	0	0	0	0
559 - Shipping and Handling	0	0	24	24	100
560 - Computer Equipment	0	0	0	0	1,000
567 - Bank Fees	1,726	1,670	2,491	5,888	7,250
567.01 - Stripe Fee - NextGen	286	131	284	701	900
567.02 - Stripe Fee - LPI	676	533	1,208	2,417	2,500
567.03 - Stripe Fee - NextGen/LPI	247	247	346	839	1,250
567.05 - Bank Charges	3	0	0	3	100
567.06 - Stripe Fees - Conference	389	631	528	1,548	1,500
567.07 - Stripe Fees - June Hunter	92	72	94	259	500
567.08 - Stripe Fees - Bethany Ensz	34	56	31	121	500
568 - Bad Debt Expense	0	0	0	0	0
570 - Sales Tax Expense	1	0	0	0	200
577 - Local Association Promotion Program	0	0	0	0	0
579 - LPI Conference Hosting Expense	16,452	22,876	20,547	59,875	70,500
579.01 - Hotel Meal Expense	15,397	22,833	20,047	58,277	67,000
579.02 - A/V	0	0	0	0	2,000
579.03 - General Hotel Expense	1,055	43	500	1,598	1,500
585 - Loss on Returned Checks	0	0	0	0	0
SUBTOTAL OF EXPENSES	69,403	81,039	98,213	248,654	355,893
TOTAL EXPENSES	69,403	81,039	98,212.94	248,654.32	355,893
TOTAL INCOME	56,850	95,132	118,968	270,950	379,780
INCOME <DEFICIENCY> OVER EXPENSES	-12,554	14,093	20,755	22,295	23,887

Legal Professionals Incorporated
Chart of Assets as of
01-31-2025

JP MORGAN CHASE* CHECKING ACCOUNT	LIVE OAK BANK** CERTIFICATE OF DEPOSIT	LIVE OAK BANK** CERTIFICATE OF DEPOSIT
LPI Acct. #101	LPI Acct. #145	LPI Acct. #146
Date Opened: 05/28/2024	Date Opened: 11/2/2021	Date Opened: 2/6/2024
Current Balance: \$109,496.49	Current Balance: \$ 33,405.34	Current Balance: \$ 37,779.67
Annual percentage Yield: no interest-bearing	Annual Percentage Yield: 4.30%	Annual Percentage Yield: 5.21%
Interest this Quarter \$.00	Interest this Quarter: \$ 119.24	Interest this Quarter: \$ 162.31
Interest paid in 2024: \$ 1.98	Interest YTD: \$ 119.24	Interest YTD: \$ 162.31
	CD Matures 11/2/2025	CD Matured 2/6/2025

* Interest accrues monthly and deposited into JP Morgan Chase (formerly known as FRB) Checking Account.

** Interest accrues monthly-deposited back into account.

Legal Professionals Incorporated

Education Council Snapshot

November 2024 - January 2025

	TOTAL	
	NOV 2024 - JAN 2025	MAY 2024 - JAN 2025 (YTD)
Income		
406 Education Council Income		
406.01 On-Line BLS Training Course	7,206.10	24,882.20
406.03 On-Line State Discovery Course	750.00	2,450.00
406.05 CCLS On-Line Study Group	1,260.20	2,417.20
406.06 On-Line Advanced Discovery Course	2,700.00	5,225.00
406.07 NextGen Webinars	1,340.00	5,335.00
406.08 CCLS Study Kit	100.00	300.00
406.09 CCLS Study Guide	75.00	175.00
406.10 LSRG	843.20	1,253.05
406.12 On-Line Trial Preparation	3,100.00	7,375.00
406.14 CCLS Skills (SK)		15.00
406.17 Legal Computations (LC)		15.00
406.18 June Hunter	2,700.00	7,262.08
406.19 Online Advanced LPT Course	550.00	550.00
406.20 Online Intermediate LPT Course	475.00	8,537.71
406.21 Webinars on Demand	2,334.96	3,563.93
406.22 Ed. Council Webinars - Non-Members	1,412.08	3,923.40
406.23 Ed. Council Webinars - Members	3,683.28	5,153.28
406.24 Bethany Ensz	1,277.08	3,642.08
406.25 Appellate/Federal Procedure Course	2,800.00	4,900.00
406.26 Health Challenge		660.00
Total 406 Education Council Income	32,606.90	87,634.93
Total Income	\$32,606.90	\$87,634.93
GROSS PROFIT	\$32,606.90	\$87,634.93
Expenses		
526 Education Council		
526.03 Ed. Council Attend Conference	3,071.66	7,386.87
526.05 Speaker Gifts		335.30
526.06 Online BLS Training Course	3,103.31	11,583.66
526.07 Online State Discovery Course	290.70	1,243.74
526.09 CCLS On-Line Study Group	373.34	856.97
526.11 NextGen Webinar Class Fees	974.04	3,810.14
526.17 On-Line Trial Preparation	654.88	3,143.66
526.18 On-Line Advanced Discovery	392.70	1,730.69
526.19 June Hunter	744.48	2,749.40
526.21 Online Intermediate LPT Course	-108.41	2,376.48
526.22 Appellate/Federal Procedure Course	814.92	2,037.48

Legal Professionals Incorporated

Education Council Snapshot

November 2024 - January 2025

	TOTAL	
	NOV 2024 - JAN 2025	MAY 2024 - JAN 2025 (YTD)
526.24 Bethany Ensz	500.61	1,814.15
Total 526 Education Council	10,812.23	39,068.54
Total Expenses	\$10,812.23	\$39,068.54
NET OPERATING INCOME	\$21,794.67	\$48,566.39
NET INCOME	\$21,794.67	\$48,566.39

Legal Professionals Incorporated

CCLS Certifying Board Income/Expenses

November 2024 - January 2025

	TOTAL	
	NOV 2024 - JAN 2025	MAY 2024 - JAN 2025 (YTD)
Income		
404 CCLS C.B. INCOME		
404.04 CCLS Exam fees	845.00	1,965.00
404.05 CCLS Recertification fees	215.00	740.00
Total 404 CCLS C.B. INCOME	1,060.00	2,705.00
Total Income	\$1,060.00	\$2,705.00
GROSS PROFIT	\$1,060.00	\$2,705.00
Expenses		
508 CCLS Cert Board Expenses		
508.02 Postage/UPS/Fed Ex		57.52
508.06 Supplies		214.64
Total 508 CCLS Cert Board Expenses		272.16
Total Expenses	\$0.00	\$272.16
NET OPERATING INCOME	\$1,060.00	\$2,432.84
NET INCOME	\$1,060.00	\$2,432.84

LEGAL PROFESSIONALS INCORPORATED
Executive Committee Officer Visitation Expenses
by Quarter

OFFICER VISITATION	DESCRIPTION	3rd QUARTER: 11/1/2024 - 1/31/2025	2nd QUARTER: 8/1/2024 - 10/31/2024	1ST QUARTER 5/2024-7/2024	YEAR TO DATE as of 7/31/2024	ADOPTED BUDGET 2024-2025
Total OV PROPOSED BUDGET 2024-2025						6,000.00
527.01 - PRESIDENT		718.06	0.00	0.00	718.06	
Donna Day, CCLS	Santa Maria (Dec. 2024)	0.00	0.00	0.00		
		0.00	0.00	0.00		
		0.00	0.00	0.00		
527.02 - VICE PRESIDENT		0.00	306.39	226.39	532.78	
Bettina Jacobson		0.00	306.39	226.39		
		0.00		0.00		
				0.00		
527.03 - EXECUTIVE SECTY		580.85	0.00	0.00	580.85	
Erika Garduño	Alameda, Los Angeles, & San Mateo (Sept. 2024)	0.00	0.00	0.00		
		0.00	0.00	0.00		
				0.00		
527.04 - TREASURER		0.00	348.57	0.00	348.57	
Larry McGrew		0.00	348.57	0.00		
		0.00	0.00	0.00		
		0.00	0.00	0.00		
527.05 - PARLIAMENTARIAN		0.00	0.00	0.00	0.00	
Elise Dresser, CCLS		0.00		0.00		
				0.00		
527.06 - EXECUTIVE ADVISOR		429.22	301.54	0.00	730.76	
Rod Cardinale, Jr.	Santa Maria (Dec. 2024)	0.00	301.54	0.00		
		0.00	0.00	0.00		
		0.00	0.00	0.00		
TOTAL OV EXPENSES		1,728.13	956.50	226.39	2,911.02	6,000.00
Income Over Expenses (Deficiency):						3,088.98

Legal Professionals Incorporated

Corporate Office Expenses

November 2024 - January 2025

	TOTAL	
	NOV 2024 - JAN 2025	MAY 2024 - JAN 2025 (YTD)
Income		
Total Income		
GROSS PROFIT	\$0.00	\$0.00
Expenses		
525 Corporate Office		
525.03 Postage/UPS/Fed Ex	10.45	26.43
525.04 Telephone		457.08
525.06 Storage		447.00
525.16 LPI Administrator	6,000.00	12,000.00
Total 525 Corporate Office	6,010.45	12,930.51
Total Expenses	\$6,010.45	\$12,930.51
NET OPERATING INCOME	\$ -6,010.45	\$ -12,930.51
NET INCOME	\$ -6,010.45	\$ -12,930.51

LEGAL PROFESSIONALS INCORPORATED

SUMMARY OF CASH BALANCES

AS OF 01-31-2025

CHECKING ACCOUNT:

#101	JP MORGAN CHASE	\$109,496.49
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SAVINGS ACCOUNTS AND SHORT-TERM CERTIFICATES OF DEPOSIT ACCOUNTS:

#145	Live Oak Bank CD 1 (12 mos)	\$33,405.34
#146	LiveOak Bank CD 2 (12 mos)	\$37,779.67

TOTAL CASH:		\$180,681.50
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Summary of Cash Balances
3rd Quarter

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LPI Members as of 01/31/2025

Total Members as of 4/30/2024	Association	Renew	New	Stud.	Assoc.'s	Reverse PC	LPI Life Members	TOTAL
26	Alameda County LSA	19	2			8	1	30
29	Beverly Hills Century City LSA	5	3				2	10
13	Conejo Valley LPA	11	2			1		14
35	Contra Costa County LPA	24				2		26
34	Desert Palm LPA	17	4			1		22
76	Fresno County LPA	48	15	2	1	2		68
17	Long Beach LPA	6	3			1	1	11
78	Los Angeles LSA	42	10			18	1	71
13	Marin County LPA	13	1			3		17
24	Merced County LPA							0
27	Mt. Diablo LPA	21	7		2	1	1	32
34	Orange County LPA	24	4			11		39
12	Placer County LPA	5	1					6
20	Riverside LPA	14	4					18
127	Sacramento LSA	57	28			20	1	106
129	San Diego LSA	83	53		4	13	2	155
24	San Fernando Valley LSA							0
97	San Francisco LPA	63	7	2		13	4	89
7	San Gabriel Valley LSA	6						6
27	San Mateo County LPA	37	3	3		0		43
108	Santa Clara County LPA	74	10	4		7	3	98
8	Santa Cruz LPA	4				2	1	7
34	Santa Maria LPA	23	19			2		44
22	Stanislaus County LPA	19				5		24
17	Stockton-San Joaquin County LPA	15	2	0	0	0	0	17
1051	TOTALS	630	178	11	7	110	17	953
133	Members at Large							102
1184	GRAND TOTAL							1055

LEGAL PROFESSIONALS INCORPORATED
ADOPTED BUDGET 2024-2025

INCOME	2024-2025 ADOPTED BUDGET	YTD 04.30.2024	2023-2024 ADOPTED BUDGET
400 - NSF Charge Income	50	0	50
402 - Per Capita	64,250	48,662	46,500
402.01 - Per Capita	50,000	40,301	40,000
402.02 - MAL	11,250	4,775	3,000
402.03 - LPI Local Association Membership	3,000	3,586	3,500
404 - CCLS Certifying Board	3,500	3,360	3,500
404.04 - CCLS Exam Fees	2,500	2,585	2,500
404.05 - CCLS Recertification Fees	1,000	775	1,000
406 - Education Council Income	147,110	113,000	98,025
406.01 - Online BLS Training Course	30,000	30,660	30,000
406.03 - Online State Discovery Course	1,200	1,250	3,000
406.05 - CCLS Online Study Group	3,000	2,792	3,000
406.06 - Online Advanced Discovery Course	7,500	8,700	6,000
406.07 - NexGen Webinars	6,000	3,350	250
406.08 - CCLS Study Kit	1,200	1,350	750
406.09 - CCLS Study Guide	100	115	200
406.10 - TLS Reference Guide	600	330	250
406.12 - Online Trial Preparation Course	19,000	17,030	10,000
406.13 - CCLS - Legal Terminology (TL)	15	30	15
406.14 - CCLS Skills (SK)	0	15	15
406.15 - Ability to Communicate Effectively (ACE)	15	15	15
406.16 - Law Office Administration (LOA)	15	30	15
406.17 - Legal Computations (LC)	15	30	15
406.18 - June Hunter	8,000	9,880	8,000
406.19 - Advanced Legal Professional Training	22,400	8,944	15,000
406.20 - Online Intermediate LPT Course	24,250	8,275	10,000
406.21 - Webinars on Demand	2,600	3,040	4,000
406.22 - Ed. Council Webinars - Non-Members	2,900	2,940	1,500
406.23 - Ed. Council Webinars - Members	100	310	0
406.24 - Bethany Ensz	9,200	5,845	0
406.25 - Appellate/Federal Procedure Course	8,000	6,900	6,000
406.26 - Health Challenge	1,000	1,170	0
408 - Royalty Income	70,865	64,017	82,000
408.01 - LPH	35,200	29,555	35,000
408.02 - LOPM	15,665	12,471	22,000
408.03 - Other Royalty	0	0	0
408.04 - LPH Digital Royalty	20,000	21,991	25,000
409 - Advertising	7,500	4,225	8,250
409.01 - The Legal Professional	3,750	2,650	4,125
409.02 - Website	3,750	1,575	4,125
410 - Interest Income	3,500	6,305	600
411 - Miscellaneous Income	20,000	11,573	5,300
411.01 - Sales of Pub/Subs.	0	0	0
411.02 - Misc. Income - Other	0	200	0
411.03 - Misc. Income-Donation to LPI	14,000	0	0
411.04 - Misc. Income-Sponsorships	0	0	0
411.06 - Online Order Convenience Fee	1,000	1,373	300
411.07 - Joint Venture Income	5,000	10,000	5,000
416 - Scholarships	0	5,417	0
421 - Jewelry	800	145	550
421.01 - CCLS Jewelry	800	145	300
421.02 - Jewelry	0	0	250
SUBTOTAL OF INCOME FORWARD	317,575	256,704	244,775

*Set amount pursuant to Bylaw and Standing Rules

LEGAL PROFESSIONALS INCORPORATED
ADOPTED BUDGET 2024-2025

INCOME	2024-2025 ADOPTED BUDGET	YTD 04.30.2024	2023-2024 ADOPTED BUDGET
SUBTOTAL OF INCOME FORWARD	317,575	256,704	244,775
425 - Marketing Items	2,600	2,679	3,200
425.03 - LPI Pens	50	55	50
425.09 - Printify Store	500	329	600
425.11 - Marketing Table Items	1,000	1,257	1,500
425.12 - LPI Polo Shirts	1,050	864	1,050
437 - Membership Promo/Contest	0	0	0
439 - Shipping & Handling	100	188	100
442 - Subsidy Reimbursement*	1,000	0	1,000
453 - New Charter Association*	5	0	5
480 - LPI Conference Income	58,500	81,989	121,400
480.01 - Registration	35,000	54,144	80,000
480.02 - Meals	2,000	2,004	4,000
480.03 - Donations	6,000	6,557	6,000
480.04 - Sponsorship	0	0	0
480.05 - Vendor	10,000	13,600	22,000
480.06 - Non Legal Vendor	1,500	1,450	5,400
480.07 - Opportunity Drawing	4,000	4,234	4,000
TOTAL INCOME	379,780	341,561	370,480

*Set amount pursuant to Bylaw and Standing Rules

LEGAL PROFESSIONALS INCORPORATED
ADOPTED BUDGET 2024-2025

EXPENSES	2024-2025 ADOPTED BUDGET	YTD 04.30.2024	2023-2024 ADOPTED BUDGET
501.01 - LPI Local Association Dues	3,000	4,590	700
502 - Publications Revision Committee	20,325	20,380	22,300
502.01 - Operating Expenses	2,750	5,021	3,200
502.02 - Annual Conference	6,000	7,757	7,500
502.03 - Quarterly Conference	9,075	7,602	11,600
502.04 - Training Retreat	2,500	0	
503 - Annual Conference	2,120	1,735	2,120
503.01 - Bulletin Contest*	225	225	225
503.02 - History Book Contest*	150	0	150
503.03 - Membership Contest*	500	125	500
503.04 - Officer Installation*	160	0	160
503.05 - Scrapbook Contest*	35	35	35
503.06 - Certificate of Awards	650	858	650
503.07 - AV Equipment	0	0	0
503.08 - Chapter Achievement Contest	400	492	400
505 - <i>The Legal Professional</i>	5,960	6,004	5,935
505.02 - TLP Postage	275	266	250
505.03 - TLP Production	5,685	5,738	5,685
507 - CCLS Expenses	0	243	0
507.07 - CCLS Expenses	0	243	0
508 - CCLS Certifying Board	3,900	3,451	4,500
508.01 - Attend Meetings	3,000	2,982	3,350
508.02 - Postage/UPS	0	0	350
508.04 - Printing/Duplicating	0	0	0
508.06 - Supplies	500	78	600
508.10 - Other Costs	400	391	200
509 - History Book*	600	0	600
511 - Officer Expenses (Elected & Appointed)	37,750	42,404	40,500
511.01 - President Expense	3,450	5,477	3,700
511.02 - Vice President Expense	4,450	4,364	4,100
511.04 - Exec. Secretary Expense	3,750	5,188	4,100
511.05 - Treasurer Expense	4,200	4,573	4,100
511.06 - Parliamentarian Expense	3,450	3,887	4,100
511.07 - Exec. Advisor Expense	3,450	5,803	4,400
511.08 - Appointed Officers Expense	15,000	13,111	16,000
512 - President's Expense*	2,000	1,500	2,000
513 - Legal Fees and Costs	1,050	1,979	500
513.01 - Legal Fees	1,000	1,979	500
513.02 - Statement of Information Fee	50	0	0
514 - Chairmen Expense	20,000	19,077	26,500
514.01 - Quarterly Conference	14,000	11,792	19,000
514.02 - Annual Conference	6,000	7,285	7,500
514.03 - Chairman Expense - other	0	0	0
517 - Officer/Chairmen Op Expense	1,800	2,779	1,300
517.01 - President Op. Expense	150	0	150
517.02 - Vice President Op. Expense	150	125	150
517.04 - Exec. Secretary Op. Expense	500	1,317	100
517.05 - Treasurer Op. Expense	1,000	1,156	500
517.06 - Parliamentarian Op. Expense	0	0	100
517.07 - Exec. Advisor Op Expense	0	0	100
517.08 - Chairman Op Expense	0	0	100
517.09 - App'ted Officers Op Expense	0	181	100
SUBTOTAL OF EXPENSES	98,505	104,141	106,955

*Set amount pursuant to Bylaw and Standing Rules

LEGAL PROFESSIONALS INCORPORATED
ADOPTED BUDGET 2024-2025

EXPENSES	2024-2025 ADOPTED BUDGET	YTD 04.30.2024	2023-2024 ADOPTED BUDGET
SUBTOTAL OF EXPENSES FORWARD	98,505	104,141	106,955
518 - General Printing	1,350	1,579	1,350
518.02 - LPI Roster	1,350	1,219	1,350
518.04 - New member Welcome Packets	0	359	0
520 - Insurance and Bond	10,510	8,466	9,797
520.01 - Directors/Officers Liability	4,560	0	3,800
520.02 - Commercial Liability	3,500	5,740	3,000
520.03 - Bond (Dishonesty)	550	447	447
520.05 - Media Liability Insurance	1,900	2,279	2,550
521 - Scholarship/Career Promotion	9,000	8,000	9,000
521.25 - 2024-2025 Scholarships	9,000	0	0
522 - Miscellaneous Expense	11,458	7,114	7,850
522.01 - President's Memento	0	0	1,000
522.02 - Expense Other	450	818	850
522.03 - Dues & Subscriptions	4,000	4,811	4,000
522.04 - Legacy Project/LPI Storage	3,108	1,485	2,000
522.05 - First legal Conference Table Expense	0	0	0
522.06 - Interim Training Meeting/EC Retreat	3,900	0	0
524 - Accounting	2,500	5,735	4,600
524.01 - Bookkeeper	900	750	900
524.02 - CPA	1,500	4,985	3,700
524.03 - Audit	100	0	0
525 - Corporate Office	26,500	39,767	41,130
525.02 - Attend Meetings	0	2,160	2,300
525.03 - Postage/UPS/FedEx	500	535	500
525.04 - Telephone	1,000	1,111	1,000
525.06 - Storage	0	694	400
525.09 - Supplies	0	1,571	30
525.12 - Photocopy	0	10	150
525.13 - Mileage	0	0	0
525.16 - LPI Administrator	25,000	33,688	36,750
526 - Continuing Education Council	88,020	83,664	59,950
526.02 - Ed. Council Operating Expenses	300	161	300
526.03 - Ed. Council Attend Conference	25,000	31,685	22,700
526.05 - Speakers' Gifts	250	0	250
526.06 - Online BLS Training Course	15,000	14,850	15,000
526.07 - Online State Discovery Course	600	628	1,500
526.09 - CCLS Online Study Group	1,200	993	1,200
526.10 - Officer/Chairmen Workshop	0	0	0
526.11 - NextGen Webinar Class Fees	3,600	905	0
526.12 - CCLS Study Kit	0	0	0
526.13 - CCLS Study Guide	0	0	0
526.14 - LSRG	0	0	0
526.17 - Online Trial Preparation	11,400	10,211	6,000
526.18 - Online Advanced Discovery	4,500	5,560	3,600
526.19 - June Hunter	4,000	5,382	4,000
526.20 - Advance Online LPT Course	6,400	1,873	1,200
526.21 - Online Intermediate LPT Course	6,250	4,259	1,200
526.22 - Appellate/Federal Procedure Course	4,800	3,711	3,000
526.24 - Bethany Ensz	4,600	2,319	0
526.25 - Next Gen Postage	120	29	0
526.27 - Health Challenge Expense	0	1,097	0
527 - Officer Visitation	6,000	8,866	5,000
528 - Subsidy Payment*	1,000	0	1,000
SUBTOTAL OF EXPENSES	254,843	267,332	246,632

*Set amount pursuant to Bylaw and Standing Rules

LEGAL PROFESSIONALS INCORPORATED
ADOPTED BUDGET 2024-2025

EXPENSES	2024-2025 ADOPTED BUDGET	YTD 04.30.2024	2023-2024 ADOPTED BUDGET
SUBTOTAL OF EXPENSES FORWARD	254,843	267,332	246,632
531 - New Association Development	200	0	200
531.01 - New Association Development	0	0	0
531.02 - New Association Charter*	200	0	200
531.03 - New Assoc Gov-Attend Qtrly Conf	0	0	0
535 - Membership Promo Contest	0	0	0
539 - Jewelry	0	1,686	0
539.01 - CCLS Jewelry	0	1,686	0
539.02 - Other Jewelry	0	0	0
540 - Marketing	21,800	24,694	17,948
540.01 - Web Master	13,000	15,613	10,000
540.02 - Brochures	0	500	0
540.05 - Marketing Table	750	752	1,000
540.07 - Marketing Events	5,500	6,030	5,500
540.12 - Printify Store	1,000	1,120	348
540.13 - LPI Pens	0	0	0
540.15 - LPI Polo Shirt	1,050	679	600
540.16 - Social Media	500	0	500
553 - Officer/Chairmen Workshop	0	0	0
555 - President's Roundtable	0	0	0
559 - Shipping and Handling	100	404	500
560 - Computer Equipment	1,000	0	2,000
567 - Bank Charges	7,250	7,466	4,360
567.01 - Stripe Fee - NextGen	900	1,108	450
567.02 - Stripe Fee - LPI	2,500	2,591	2,100
567.03 - Stripe Fee - NextGen/LPI	1,250	946	1,000
567.05 - Bank Charges	100	185	85
567.06 - Stripe Fees - Conference	1,500	2,041	450
567.07 - Stripe Fees - June Hunter	500	376	275
567.08 - Stripe Fees - Bethany Ensz	500	219	0
568 - Bad Debt Expense	0	0	0
570 - Sales Tax Expense	200	276	175
577 - Local Association Promotion Program	0	0	4,200
579 - LPI Conference Hosting Expense	70,500	100,721	86,500
579.01 - Hotel Meal Expense	67,000	92,591	75,000
579.02 - A/V	2,000	415	7,500
579.03 - General Hotel Expense	1,500	7,715	4,000
585 - Loss on Returned Checks	0	0	0
TOTAL EXPENSES	355,893	402,578	362,515
TOTAL INCOME	379,780	341,561	370,480
INCOME <DEFICIENCY> OVER EXPENSES	23,887	-61,017	7,965

*Set amount pursuant to Bylaw and Standing Rules



OFFICE OF: EXECUTIVE ADVISOR
 ROD CARDINALE, JR.
 E: EXECUTIVEADVISOR@LEGALPROFESSIONALSINC.ORG

**NOMINATIONS & ELECTIONS
 THIRD QUARTERLY CONFERENCE REPORT**

The President and Governor of each local association and the LPI elected officers were provided with an official call for nomination of officers for Legal Professionals, Incorporated, on January 23, 2025. To date, the following nominations have been received:

<u>OFFICE</u>	<u>NAME AND ASSOCIATION</u>
President	Donna Day Alameda County LSA
Vice President	Bettina Jacobson Placer County LPA
Executive Secretary	Erika Garduño Riverside LPA
Treasurer	Larry McGrew San Francisco LPA

Original Nomination of Candidates/Consent and Certification of Nominees for Office of Legal Professionals, Incorporated, for fiscal year 2025-2026, received by me no later than March 5, 2025, will be accepted and included on the official slate. Nominations may be made at LPI's Third Quarterly Conference in Santa Cruz, California, at the Hilton Santa Cruz/Scotts Valley, on Saturday, February 22, 2025; however, nominees must have proper credentials. Properly credentialed nominations may also be made at LPI's 91st Annual Conference at the Sycuan Casino Resort in El Cajon, California, on Saturday, May 17, 2025.

Prior to April 1, 2025, I will furnish each Governor with the slate of candidates, including a brief biographical sketch of each nominee, along with a statement that each nominee has been properly nominated, and the necessary documents are on file. Governors are responsible for ensuring that each Delegate attending the Annual Conference on behalf of their association has been provided with this information.

If I do not receive the necessary documents for each nominee by March 5, 2025, said nominee shall not be included on the official slate.

Thank you very much and I look forward to seeing you in Santa Cruz.

Sincerely,
Rod Cardinale, Jr.
 LPI Executive Advisor



OFFICE OF: PARLIAMENTARIAN
ELISE DRESSER, CCLS
E: PARLIAMENTARIAN@LEGALPROFESSIONALSINC.ORG

February 22, 2025

PARLIAMENTARIAN THIRD QUARTERLY REPORT

Greetings LPI Members:

Happy New Year! I hope 2025 is starting out well for all of you.

Thank you to the local associations who have been hard at work updating and revising their bylaws and standing rules. I am currently in the process of assisting a number of local associations with some very important issues, including amending outdated bylaws and standing rules, and providing advice to the local association officers. I am working my way through the various issues, and hope to be able to respond to everyone this year.

Pursuant to LPI's bylaws, *Robert's Rules of Order* is the parliamentary authority where applicable and there should be no conflict between these rules and the bylaws and articles of incorporation of LPI. The bylaws of each local association, in turn, shall also not conflict with LPI's bylaws. Questions often come up on various topics relating to parliamentary procedure, including how to amend bylaws and standing rules, the difference between motions and recommendations and how to present them to the membership, voting by email, quorums for membership meetings, and more. If you have any suggestions or topics you would like covered, please feel free to reach out to me.

I look forward to assisting you throughout the year and stand ready to help you with any questions you may have regarding proper parliamentary procedure in connection with the business of your local association. Thank you for your encouragement and patience as I work with the various local associations, and please feel free to reach out to me with your parliamentary questions.

Best regards,

Elise Dresser, CCLS

Elise Dresser, CCLS
LPI Parliamentarian

cc: Donna Day, LPI President

[RETURN TO TOC](#)



OFFICE OF: EDITOR-IN-CHIEF
 LINDA LANE, CCLS
 EMAIL: EDITORINCHIEF@LEGALPROFESSIONALSINC.ORG

February 1, 2025

Office of: Publications Revision Committee
 Editor-in-Chief, Linda Lane, CCLS (Los Angeles LSA)
 Lisa De La O (Los Angeles LSA)
 Editor, *Legal Professional's Handbook*
 Elizabeth Adame, CCLS (San Diego LSA)
 Editor, *Law Office Procedures Manual*

THIRD QUARTERLY CONFERENCE REPORT TO EC

As the Publications Revision Committee (PRC) enjoyed their down, we will start 2025 with our Annual Interim Meeting scheduled for Saturday, February 8, 2025. So, we will be busy throughout the year, as we plan to add a new chapter to the Legal Professional's Handbook. We will begin editing and updating the (first revision) of the Law Office Procedures Manual (LOPM).

Royalties received for this quarter (October 2024 through December 2024) totaled \$14,631.42, and is broken down as follows:

		Rutter (Net)	LPI (Net)	
LOPM – Man Full Set	62	\$6,594.97	\$2,198.10	
LOPM – Man Sub		<u>\$2,718.21</u>	<u>\$ 905.97</u>	
LOPM – Total		\$9,313.18	\$3,104.07	\$3,104.07
LPH – Subscriptions		\$ 9,932.29	\$2,483.06	
LPH – Full Set	2	\$ 1,725.64	\$ 431.41	
LPH – CH 1-15 CONT 2024	-13	\$ (2,519.37)	\$ (629.84)	
LPH – CH 16-23 CONT 2024	-13	<u>\$ (2,519.37)</u>	<u>\$ (629.84)</u>	
LPH – Total		\$ 6,619.19	\$1,654.79	\$1,654.79
LPH - Online		<u>\$ 8,792.63</u>	<u>\$ 9,872.56</u>	
LPH – Online Total		\$ 8,792.63	\$ 9,872.56	\$9,872.56
TOTAL ROYALTIES				\$14,631.42

THIRD QUARTERLY CONFERENCE REPORT TO EC

February 1, 2025

Page Two

I would like to remind you, if you or your law firm has a Westlaw account, search for the Legal Professional's Handbook online, which is the only publication that is currently on Westlaw. As you can see from our royalty breakdown, the more you click on the link to the Legal Professional's Handbook it has paid off. This quarter is the most amount of free money, LPI has received just for clicking on the link on Westlaw. Please keep clicking and remember my slogan! CLICK... CLICK... CLICK... CHING... CHING... CHING....

Please help market the Law Office Procedures Manual and Legal Professional's Handbook at your monthly meetings, your website, and social media (i.e., Facebook/ Instagram). We can all spread the word to our colleagues and coworkers, that LPI's publications are a "MUST HAVE."

Thank you to my TEAM for their continued hard work, time, and dedication they have contributed to the Publications Revision Committee (PRC).

Thank you, Donna Day, for the opportunity to serve LPI during your term as LPI President.

Linda Lane, CCLS

Linda Lane, CCLS Editor-in-Chief

LISA DE LA O

Editor, *Legal Professional's Handbook*

ELIZABETH ADAME, CCLS

Editor, *Law Office Procedures Manual*

PRC Committee:

Linda Lane, CCLS, Editor-in-Chief

Lisa De La O, Editor, LPH

Elizabeth Adame, CCLS, Editor, LOPM

Lidia Gandevia, Assistant Editor

Brenda Johnson, CCLS, Assistant Editor

Cheryl L. Kent, PLS, CCLS, Assistant Editor

Pennie MacPherson, Assistant Editor

Tanya Tate, Assistant Editor

Michelle Welch, CCLS, Assistant Editor



Office of: Renee M. Evans, CCLS
Education Director
educationdirector@legalprofessionalsinc.org

FEBRUARY 2025 - EDUCATION REPORT

Hello Members,

I hope you are all having a wonderful new year.

The Education Committee has been working hard to provide you with great webinars, seminars and classes and we have them booked through May 2025, including *Changes in the Law* on Saturday, February 8, 2025. Did you miss it? No problem. You can watch it on our Webinars on Demand page - <https://www.legalprofessionalsinc.org/recorded-webinars-for-sale/>.

Our members have requested specific topics, and we are listening. We will be offering a two-day workshop on Federal Court Practice on March 1 and 8. Additionally, on March 3, 10, and 17 at Noon, we are presenting *CEQA 1, 2, 3: Navigating Pre-Litigation, the Administrative Record, and Litigation* (a 3-part series). On March 15, there is a four-hour, hands-on research workshop titled *Case Briefing: From Fact-Finding to Memorandum Drafting using ChatGPT and Other Internet Resources*.

If there is a particular area of law you would like us to present, please email me or one of the other Education Committee members.

MANDATORY CONTINUING LEGAL EDUCATION (“MCLE”)

I would like to thank all the associations that have been promptly sending me their MCLE paperwork. If you have hosted an MCLE event, I would appreciate you checking with your program chair to confirm they have sent me the necessary paperwork.

For ease of reference, below is the list of things you need to send me every time you have an MCLE event. Please note that it is the responsibility of the local association President and Governor to ensure compliance.

A. Miscellaneous

1. You CANNOT let anyone use LPI’s number.
2. Flyers must be sent to flyers@legalprofessionalsinc.org.
3. Please add educationdirector@LegalProfessionalsInc.org and flyers@LegalProfessionalsInc.org to your database.

B. Flyers

1. Since LPI is the approved Multiple Activity Provider (MAP), and the State Bar does not allow co-sponsoring, the flyers for all webinars and seminars must state that the activity is being “Presented by Legal Professionals Incorporated.” The local association may include, “Speaker Provided By” on the flyer.

2. You must include the title of the activity on your flyer.

3. The time of the presentation needs to be exact on your flyer (i.e., if you are offering 1 hour of MCLE credit at Noon your flyer must say 12:00 p.m. to 1:00 p.m.). If you are offering one (1) hour the presentation needs to last one (1) hour. You cannot give credit for breaks, lunch/dinner, or nonlegal education functions such as networking.

4. **Remember** - You can always offer CCLS credit only!

5. Per Rule 3.601 of the Rules of the State Bar:

Promotional material (i.e., your flyers and online postings) must state that the MCLE activity is approved for MCLE credit or that a request for approval is pending; specify the amount of credit offered; and indicate whether any of the credit may be claimed for required MCLE in legal ethics, elimination of bias, or competence issues.

Here is sample MCLE language for your promotional materials:

This [webinar/seminar] is approved for California Minimum Continuing Legal Education (MCLE) credit in the amount of 1.0 credit hour. This webinar is also approved for 1.0 hour of CCLS credit.

Here is sample MCLE language for your promotional materials if your program included ethics credit, competence credit, etc:

This [webinar/seminar] is approved for California Minimum Continuing Legal Education (MCLE) credit in the amount of 1.0 credit hour, including 1.0 credit hour of [ethics] credit. This webinar is also approved for 1.0 hour of CCLS credit.

Here is sample language for seminars/webinars that only qualify for CCLS (No MCLE):

This webinar is approved for 1.0 hour of CCLS credit. MCLE credit is not available.

If I am not sure if your flyer qualifies for MCLE credit, I will send it to the State Bar. In addition, I may also ask for your handout. Please send me copies of your flyer well in advance of your event in case any changes need to be made.

C. Marketing

1. Since LPI is the MAP (Multiple Activity Provider), LPI must be the main marketer of your event; you can also market the event yourself.

2. Please send your flyers to flyers@legalprofessionalsinc.org. We will add your seminar/webinar to the LPI website and blast it to our membership (which is currently over 4,100 strong).

D. Presentation (Speaker, PowerPoint/Handout, etc.)

1. Your MCLE activity must relate to legal subjects directly relevant to licensees of the State Bar or have significant current professional and practical content (i.e., the topic should be presented as if it is being taught to an attorney, **not** legal secretaries, or paralegals).

2. The presenter of the MCLE activity must have significant professional or academic experience related to its content.

E. Record Of Attendance

If you do an electronic record of attendance on your website, you should include a check box and use this language:

I declare under penalty of perjury that by submitting this evaluation and electronically signing by checking the box below, I attended the entire presentation hosted by Legal Professionals Inc.*

Yes

F. Documents that MUST be sent to the Education Director

I must upload MCLE events to the State Bar website immediately after completion of the activity. Therefore, the following documents must be sent to me **no later than one (1) week** after your seminar/webinar.

1. **Any promotional materials (i.e., your flyer)**

Promotional material(s) must state that the activity is approved for MCLE credit; specify the credit hours offered; indicate whether any of the credit may be claimed for required MCLE in legal ethics, elimination of bias, implicit bias, competence issues, or legal specialization; and whether the activity is participatory or self-study.

2. **NEW - Speaker biographies**

Each speaker's biography must contain the speaker's professional credentials, including all relevant work experience and academic achievements. You can put this information on the flyer or send it to me separately. A resume may be submitted in lieu of a biography.

3. **Written materials**

Written materials are required for each MCLE activity of one (1) hour or more in length. The required materials must include all syllabi and/or handouts that were made available to all attendees before or during the activity and must discuss the content and/or legal authorities discussed during the MCLE activity. A PowerPoint presentation may be submitted as written materials.

4. **Records of Attendance (sample attached)**

For each of the activities, including the title of the MCLE activity; date; total hours awarded; any credits awarded for legal ethics, elimination of bias, implicit bias, prevention and detection competence, wellness competence, technology in the practice of law, civility in the legal profession; whether the activity is participatory or self-study; and the name and State Bar number of each California licensee. For activities or programs offered during half-day or multiday events, each session and the applicable credit hours must be identified so that the total number of hours of MCLE credit given can be verified.

5. **Evaluation forms (sample attached)**

I have attached the MCLE form, the CCLS form and Certificate of Attendance for your convenience. You can find these forms on LPI's website under the Members Only Content/LPI Forms.

G. New MCLE course requirements

Beginning with the compliance period ending January 31, 2025, licensees are required to also complete and report compliance on the following new subfields:

Competence credit (two hours required)

- At least one hour focused on prevention and detection education that addresses substance use or other mental or physical issues that impair a licensee's ability to perform legal services with competence (prevention and detection competence); and
- An optional hour focused on wellness education, including physical and mental wellness and wellbeing or stress management, in the context of the practice of law and the impact these issues can have on an attorney's ability to perform legal services with competence (wellness competence).

Technology in the Practice of Law credit (one hour required)

One hour addressing technology in the practice of law, including education on technology tools, programs, or applications to assist attorneys in their law practice.



Civility in the Legal Profession credit (one hour required)

One hour addressing civility in the legal profession, including education that discusses the link between civility and bias, incivility that is directed at opposing parties or counsel, and incivility aimed at the judiciary.

I am here to support your organization's success. If you have any questions about our educational platform, need assistance downloading Webinars on Demand for your association, or have inquiries about MCLE, please feel free to reach out to me.

Warm regards,

A handwritten signature in blue ink that reads 'Renee Evans'.

LPI Education Director

Email: educationdirector@legalprofessionalsinc.org

Website: www.legalprofessionalsinc.org



California MCLE Certificate of Attendance

Provider Name: _____ **Provider No.:** _____

Title of Activity: _____

Location of the Activity (*City, State/Country/Remote*): _____

Date & Time of the Activity: _____

Minimum Continuing Legal Education (MCLE) Credit Hours Awarded for the Above Activity:

Credit Type	Credit Hours
General MCLE	
Legal Ethics	
Recognition & Elimination of Bias	
Implicit Bias	
Prevention & Detection Competence	
Wellness Competence	
Technology in the Practice of Law	
Civility in the Legal Profession	
Total	

**Below section is to be completed by the Paralegal, California Licensee and/or the
Provider after participation in the activity**

Name of Paralegal or CA Licensee (*print name*)

CA Bar Number

Signature of Paralegal or CA Licensee

ACTIVITY EVALUATION FORM FOR CALIFORNIA MCLE & LSMCLE

Please complete and return to Provider *(please print)*

Provider Name: _____ Provider Number: _____

Title of Activity: _____

Type of Activity: MCLE LSMCLE, please specify specialty area: _____

Date of Activity: _____ Time of Activity: _____

Location of Activity (City, State/Country/Remote): _____

Please indicate your evaluation of this course by completing the table below

Question	Yes	No	Comments
Did this program meet your educational objectives?	<input type="checkbox"/>	<input type="checkbox"/>	
Were you provided with substantive written materials?	<input type="checkbox"/>	<input type="checkbox"/>	
Did the course update or keep you informed of your legal responsibilities?	<input type="checkbox"/>	<input type="checkbox"/>	
Did the activity contain significant professional content?	<input type="checkbox"/>	<input type="checkbox"/>	
Was the environment suitable for learning (e.g., temperature, noise, lighting, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	

Please rate the instructor(s) of the course below

Instructor's Name and Subject Taught	On a scale of 1 to 5, with 1 being Poor and 5 being Excellent, please rate the items below	Rate 1 – 5
	Overall Teaching Effectiveness	
	Knowledge of Subject Matter	

Instructor's Name and Subject Taught	On a scale of 1 to 5, with 1 being Poor and 5 being Excellent, please rate the items below	Rate 1 – 5
	Overall Teaching Effectiveness	
	Knowledge of Subject Matter	

Instructor's Name and Subject Taught	On a scale of 1 to 5, with 1 being Poor and 5 being Excellent, please rate the items below	Rate 1 – 5
	Overall Teaching Effectiveness	
	Knowledge of Subject Matter	



California Certified Legal Secretary
A Program of LPI®



CERTIFICATE OF ATTENDANCE FOR LIVE WEBINARS

Retain this form and submit a copy to the CCLS Certifying Board, together with an Application for Recertification, and the recertification fee no later than the date on which your current certification expires.

_____ has attended the following program approved by
the CCLS® Certifying Board for recertification hours:

Date of Program: _____

Title of Program: _____

Location: _____

Actual Length of Program (Excluding Meals): _____

This program has been approved for the following maximum hour(s): _____

Provider Name: _____

Date: _____

Provider Signature (above)

Name: _____

Title: _____

The bottom portion of this form is to be completed by the attendee after participation in the above-referenced activity.

By signing below, I certify that I participated in the activity described above and am therefore entitled to claim the above CCLS credit hour(s).

Print Your Name (clearly): _____

Signature: _____



LPI

*Educating California's
Legal Support Professionals*

LEGAL PROFESSIONALS, INCORPORATED

CERTIFICATE OF ATTENDANCE

has attended the following program:

Date of Program: _____

Title of Program: _____

Location of Program: _____

Actual Length of Program (excluding breaks): _____ hours

Date: _____

Provider Signature

Name: _____



OFFICE OF: CHRISTINE J. FLORES, CBA
LEGAL PROCEDURE CHAIR/BLOG EDITOR
E: LEGALPROCEDURE@LEGALPROFESSIONALSINC.ORG

Quarterly Legal Procedure Report January 2025

This is the time of year when Courts are implementing changes to the local rules, to filing fees, and to scheduled service hours. Please be sure to check court websites along with The Podium to stay in the know with what has changed.

We are looking for guest writers, and for interesting tidbits from our members. The content can be of general interest, or a trick of the trade that you would like to share. If you've never written for The Podium before, please consider doing so! We hope to keep the content fresh and relevant. Whether you write once a month, once a quarter, once a year, or once in your life, we value your contribution! Please also consider referring us to a colleague who may have something to share as a guest writer.

Please share The Podium with your colleagues and the attorneys you work with.

Respectfully

Christine J. Flores

Christine J. Flores, CBA
LPI Legal Procedure Chair/Blog Editor



OFFICE OF: 2025 ANNUAL CONFERENCE CHAIR
ELIZABETH ADAME, CCLS
2524 SINGING VISTA WAY
EL CAJON, CA 92019
E: LIZ.ADAME@ATT.NET

January 26, 2025

2025 Annual Conference Report

Are you prepared to dive into the life of Jay Gatsby? Do you feel like embarking on a nostalgic adventure through a legendary time filled with glamour, sophistication, and vintage allure? If the roaring 20s came to mind—with its Art Deco buildings, silent films, and bootlegging culture—you're definitely on the right path! Likewise, if you pictured moments from movies like "The Great Gatsby," "Dr. Jekyll and Mr. Hyde," or "The Kid," then you're also on the right track.

San Diego Legal Secretaries Association ("SDLSA") wants to welcome you to America's finest city and invites you to join us for an unforgettable celebration as we host LPI's 91st Annual Conference on May 15-18, 2025 at Sycuan Casino Resort, 5469 Caino Way, El Cajon, California. Get ready to indulge in a world of education, glitz, culinary delights, and sip on cocktails reminiscent of the spirit of the 20s. Don't miss out on this incredible experience!

SDLSA is excited to connect our attendees with their legal network by offering a chance for our members to engage with other Local Associations. We warmly invite all Local Associations to reserve a FREE table alongside our vendors. Please bring your flyers and any information about your association to share.

The scrip price is tentatively \$225 (\$235 for registrations received after April 14, 2025). Room rates are \$195 for Wednesday/Thursday and \$225 for Friday/Saturday. The resort fee has been waived and there is no cost for self-parking. Transportation from San Diego International Airport can be by Uber, Lyft or taxi. Currently, the Resort does not offer shuttle service, however, this is something we continue to discuss with the Resort in an attempt to have one of their shuttles used specifically to pick up/drop off at the airport.

Registration link will be available after February Conference. All registrations for this conference will be online at www.sdlsa.org and you will have the ability to pay by check or with credit card.

San Diego and its surrounding areas offer many exciting activities for the whole family to enjoy. You can spend a day at the beach, visit SeaWorld, Sea Port Village, the Midway, Legoland, the Wild Animal Park, or the Zoo. If you're looking for a romantic getaway, consider

traveling a little north to the beautiful Temecula wine country. So, why not plan a family event and create unforgettable memories with your loved ones?

We look forward to having you join us!



Cheerio.

Liz Adame, CCLS
2025 Annual Conference Chair



OFFICE OF: HEATHER CZULEGER-NOWAK
advertising@legalprofessionalsinc.org

Third Quarterly Report • Advertising • February 2025

Announcement: Legal Professionals Incorporated (LPI) is thrilled to be working on a new Sponsorship Program. This program is designed to provide enhanced opportunities for our current advertisers and attract new sponsors who align with LPI's brand values. We are currently in the beginning stages of creating the LPI Sponsorship Program. Our dedicated Marketing team has been working closely to finalize the material and ensure that the program meets the highest standards of excellence. LPI's objective will be to enhance visibility and engagement for our advertisers and sponsors, foster stronger relationships with current and potential partners and provide unique and valuable opportunities for sponsorship with LPI.

Our Marketing team is conducting thorough research and analysis to craft a program that delivers maximum benefits. We aim to create a comprehensive sponsorship package that includes various levels of participation, tailored to meet the diverse needs of our advertisers and new sponsors.

Next step will be to finalize the sponsorship package and material. Once completed, we will set up a Zoom meeting to present the new program. This Sponsorship Program represents a significant step forward in our commitment to providing value to our advertisers and sponsors. We are excited about the opportunities this program will create and look forward to its successful implementation.

It is a privilege to serve as LPI's Advertising Chair. If you need assistance with your association advertising, have questions or new ideas, or simply want to talk, please contact me; I'd love to hear from you.

Best Regards,

Heather Nowak

LPI Advertising Chair



OFFICE OF: CAREER PROMOTION/PROFESSIONAL LIAISON
LEANNE RUESINK
E: CAREER_PROMOTIONPROFESSIONALLIAISON@LEGALPROFESSIONALSINC.ORG
lruesink@firstlegal.com

Third Quarter Report

January:

January 28: Zoom meeting with Michele Knox, litigation supervisor of **Keker Van Nest**. Donna and I gave a PowerPoint presentation to demonstrate the advantages of allowing LPI to partner with their team, providing on-going education and resources. Michele's key take away is in providing individualized educational tracks so that each member can tailor their personal growth goals. She is also very interested in scheduling firm-wide learning sessions in their office. Michele returns from vacation on 2/10 and will address the next steps with us. A reference was requested, and Diane Rames already made an introduction with Michele via email.

January 22: Visit with **Greenberg Traurig**, chatting with the staff who did not renew their membership. After visiting with Carleen and crew, they are going to renew once Dom gets back from vacation. We will schedule an in-house training session in February or March.

January 21: Javier Morelos of **Hersh Family Law** would like to schedule a meeting in February on a Tuesday or Thursday with his staff to reconnect with LPI and how to get the most of their membership. This is scheduled for February 11, 10:00 AM.

Job Postings:

Kolar & Associates – Southern CA

December:

Met with Dom Manuel, new director at **Greenberg Traurig**, San Francisco. He would like to schedule time with me and Carleen Fernandez to discuss how their team can better utilize their membership and take advantage of the LPI offerings. I will follow up with this appointment mid-January

Hersh Family Law – Javier Morelos would like to dive into how his team can take advantage of their memberships with LPI. I will reach out in January to schedule this discussion.

Job Postings:

Pathways Personnel
P/T secretary for a retired attorney
Murphy Pearson, SF

November:

Leanne took a break from LPI outreach due to personal commitments.



OFFICE OF: MARIA BISHOP, CCLS
 CHAIR, CCLS CERTIFYING BOARD
CCLS.CBCHAIR@LEGALPROFESSIONALSINC.ORG

THIRD QUARTERLY REPORT CCLS CERTIFYING BOARD

It has been a busy quarter for the CCLS Certifying Board. The board is constantly reviewing and trying to improve everything in connection with the CCLS program, which includes updating study materials, forms, procedures for recertification, and most of all putting out a first-rate CCLS Exam.

The 2025-2026 schedule for CCLS Exams will be:

- March 15, 2025. Deadline to apply: 1/14/25. Deadline with late fee: 2/12/25
- September 20, 2025 Deadline to apply: 7/22/25. Deadline with late fee: 8/21/25
- March 21, 2026 Deadline to apply: 1/19/26. Deadline with late fee: 2/19/26
- September 19, 2026 Deadline to apply: 7/21/26 Deadline with late fee: 8/20/26

The next recertification deadline is 3/31/25. If you are unsure if you need to recertify, please contact our Recertification Chair, Sally Butterworth, CCLS, at sallyb91901@gmail.com.

As reported last quarter, the CCLS Certifying Board’s new fee schedule is as follows:

CCLS CERTIFYING BOARD – FEE SCHEDULE		
	LPI Member	Non-Member
Registration	25	75
Exam Fee	125	125
TOTALS:	150	200
Partial Retake Fee*	70	80
Deferral Fee**	60	
Late Fee	45	
Recertification	40	
Request for Extension to Recertify	25	
New Certificate	30	
*Must have passed 4 sections, otherwise full Exam Fee is required.		
**If fee is not paid within 30 days before the next exam, all fees are forfeited.		

If you are considering applying for the exam, please review the CCLS Information Kit which can be found on the LPI website.

If you need to defer your next exam date (after applying to take the exam and paying the exam fee), you may submit the Application to Defer to the CCLS CB Chair. You may only defer once but if you have a hardship and need to defer a second time, the CCLS CB will review your application. Only for emergency purposes will you be allowed to defer a second time. The fee to defer is \$60.

If you need to re-take an exam, please note that you must pass at least 4 sections in order to pay the Partial Retake Fee. If you have not passed at least 4 sections, you must reapply to take the full exam and you must pay the full exam fee. (Refer to paragraph F. of the CCLS Information Kit.)

If you are recertifying, it is your responsibility to keep track of your recertification deadline. The fee to recertify has been increased to \$40. There is a fee to request an extension to recertify. (Refer to the Standards for Recertification which can be found on the LPI website.)

With LPI's Education Council providing more online educational opportunities, the Certifying Board has been busy evaluating the Standards for Recertification and making reasonable modifications so that CCLSs can earn continuing education credit when participating in the new programs offered by LPI.

We encourage local associations to promote the CCLS program. We challenge each and every one of you to make an effort to reach out and promote the CCLS program. Talk to your members and guests at your monthly membership meetings. Reach out and contact your local law firms, legal secretaries, and legal assistants who are unaware of LPI and/or the CCLS program and enlighten them.

Most importantly, I wish to thank the extremely hard-working and enthusiastic members of the CCLS Certifying Board: Sally Butterworth, CCLS, Amy Mann, CCLS, Launa Atkinson, CCLS, and Carolina Ramos, CCLS. It is my honor and pleasure to work with this dedicated group.

Respectfully submitted,
MARIA BISHOP, CCLS
Chair, CCLS Certifying Board



Office of: Vivian Shreve, CCLS
CCLS CHAIR
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Phone: (408) 813-8272
cclschair@legalprofessionalsinc.org

January 15, 2025

THIRD QUARTERLY REPORT

We currently have 8 people taking the CCLS Online Study Group – three are retaking it and five are new to the group.

I am currently reviewing and updating the homework and class information for the study group. I will likely update the study guides in the fall, after the mid-year updates are incorporated in the LOPM. Working with the PRC as they make their revisions should make this process much easier and more efficient.

I'll be presenting on Legal Computations at Conference in February in preparation for the March Exam and preparing a Skills presentation for the Annual Conference in May.

The next CCLS Exam will take place on Saturday, March 15. The deadline to sign up for the exam without a late fee has passed. However, you can still sign up until February 12, with a \$45 late fee.

The next Recertification deadline is March 31, 2025. So, if you need to recertify, or if you're not sure of your recertification date, please reach out to Sally Butterworth, CCLS (sallyb91901@gmail.com.) and she'll be able to help you.

As always, I am available any time by phone or email for people with questions or concerns about anything related to the CCLS Program.

Respectfully submitted,

VIVIAN L. SHREVE, CCLS
LPI CCLS Chair
cclschair@legalprofessionalsinc.org



OFFICE OF: RON ACKLAND, COMMUNICATIONS COMMITTEE CHAIR / EDITOR-IN-CHIEF, *THE LEGAL PROFESSIONAL*[®]
TLPEditor@LEGALPROFESSIONALSINC.ORG

Communications Committee • Third Quarterly Report • February 2025

Greetings, all! Welcome to LPI's Third Quarterly Educational Conference in Santa Cruz / Scotts Valley. As you participate in this weekend's conference, please send your photos and memories to TLPEditor@LegalProfessionalsInc.org to be included in the next issue of *The Legal Professional*[®].

We've had a few questions about content and photos "missing" in the magazine. This is due to the fact that we were behind in our publication schedule. Normally, content and photos from the past conference are included in the next issue published. To keep the continuity of what is in each issue, we staggered the content to correspond with what would normally be in each issue. It was a larger task than anticipated to revamp the magazine and retool the electronic and printed versions to the new format / design. A lot was learned during this process and I feel most of the major problems and challenges have been overcome.

The latest issue (Fall 2024) highlights events from the August 2024 conference because normally that issue will publish in mid-October; after the August conference and before the November conference.

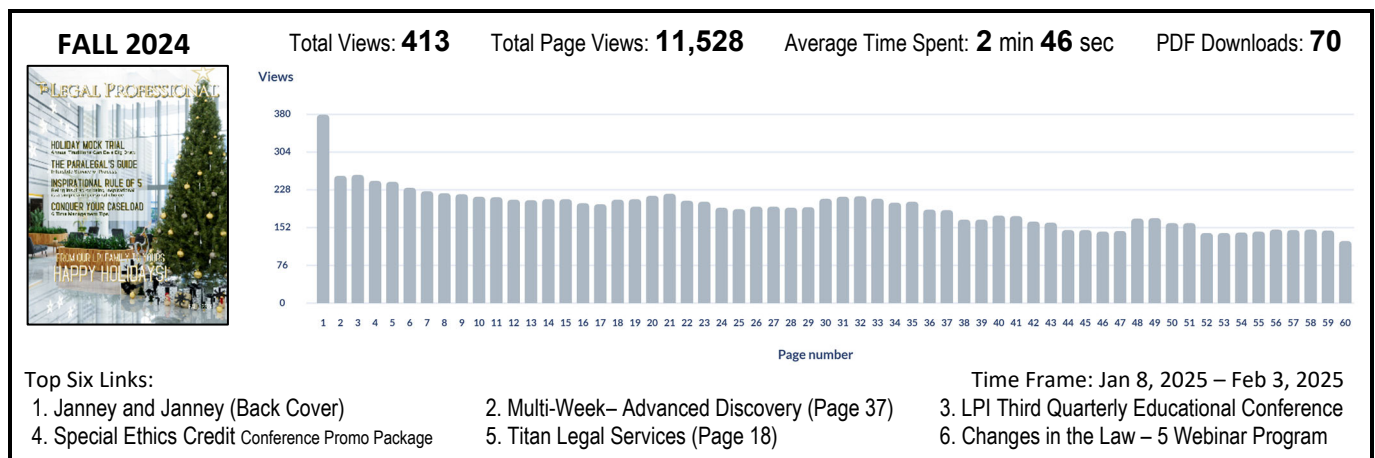
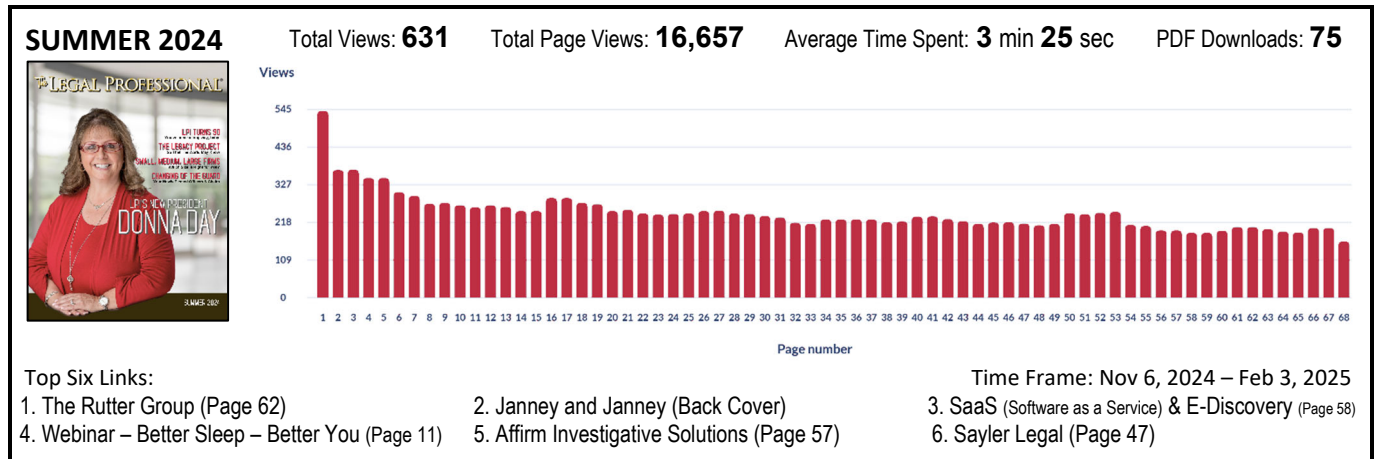
The next issue (Winter 2025) will be published the beginning of February 2025 and will contain events and photos from the November conference. In the regular schedule this issue will be published in mid-January. After the Winter 2025 issue we will be back on a regular schedule which will be:

<u>Issue Date</u>	<u>Published Approximately</u>	<u>Submission Deadline</u>	<u>Corresponding Conference</u>
SPRING	Mid-April	April 1	May
SUMMER	Mid-July	July 1	August
FALL	Mid-October	October 1	November
WINTER	Mid-January	January 1	February

You'll notice that we no longer publish article submission lists for the local associations. I wanted to create more of a collaborative relationship with the local associations instead of a "your turn" approach. We accept articles from all associations AND INDIVIDUALS at **any time**. If you see an article somewhere else that you think would be of interest to our membership, let us know and we'll try to acquire and publish it. Please keep us informed of your local association activities and be sure to send us information about what your local association is doing. We'd like to highlight and share the meetings, activities, and fun that you have planned. Add us to your mailing list for general announcements and copies of your bulletin. You will notice that we list all of them in the Calendar of Events pages. Going forward we have even more ideas to highlight the local associations as well as LPI, but truly, we need your help to do that. Submissions may be sent to TLPEditor@LegalProfessionalsInc.org or ronaldackland@gmail.com

And, we need your feedback. It's great to hear that you love something, great job, etc. – but if you think we're missing the mark on something or you have an idea to do it better, or we've left something out, we'd love to hear it. The magazine is foremost for the membership and we want to make sure that it works for the membership.

One of the big changes with the electronic version of the magazine is that we are now able to provide you and our vendors with statistical information about who is viewing the magazine. In the charts below you will find information about our first two issues, SUMMER 2024 and FALL 2024.



And please remember our advertisers and sponsors and contact them first when you need their various services! Thank them for supporting LPI and let them know you are an LPI member.

Are you interested in receiving a printed copy of the magazine? We have subscriptions available to members for the reduced price of \$50 annually (\$12.50 per issue). Complete details are available at the marketing table. (If you submit an article that is published, you receive a complimentary copy of that issue!)

If there is anything I can do to help with your communication needs in your local association, please reach out to me and let's discuss it. Lastly, don't forget to communicate with those in your firm and your circle of friends and colleagues about LPI's many educational programs and activities. We're learning, having fun, and **YOU** are part of that!

Have a great conference weekend!
Ron



RON ACKLAND
Communications Committee Chair 2024-2026
Editor-in-Chief, *The Legal Professional*[®]
TLPEditor@LegalProfessionalsInc.org





OFFICE OF: CONTINUING EDUCATION COORDINATOR
JANICE WILLIAMS, CCLS
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FEBRUARY 2025 - Report of the Continuing Education Coordinator

LPI Colleagues:

Not only does the Continuing Educational Committee (CEC) provide four (4) FREE seminars at each conference, the Professional Development Coordinator has been providing a special ethics credit conference promo package. This special promo package allows you to attend the Legal Technology training and and still watch the recordings of the other four (4) webinars.

As a member of LPI, if you attend conference in-person the CEC seminars are **FREE!** Those attending via Zoom pay a small one-time registration fee.

FEBRUARY 21-23, 2025, QUARTERLY CONFERENCE – SANTA CRUZ, CA:

The CEC Team has put together a great group of speakers and topics for the February Conference:

- Legal Computations (CCLS Credit Only)
- Diversity, Equity, and Inclusion (DEI): Strategies for Fostering a Diverse Legal Workforce and Addressing Bias in the Legal System (Elimination & Bias Credit)
- To Rat or Not to Rat? A Deep Dive into Rule 3.8 of the Rules of Professional Conduct (Ethics Credit)
- Navigating the Future – ChatGPT and AI in Legal Practice

No handouts will be provided at the seminars and will be emailed the day before conference, so please be sure to register early. Three of the Continuing Legal Education seminars qualify for CCLS and MCLE, with one CLE class offering MCLE in Elimination & Bias and another offering Ethics Credit. Legal Computations only offers CCLS credit.

During the November Conference, there were 100 attendees registered for the various CLE courses. Due to the holidays, the Continuing Education team will have put on six webinars at the time of the February conference. This report is due before the webinars so the number of registered attendees will be reported at the next conference. The CEC has the following webinars scheduled for the remaining of the year.

Maybe at the times here.

February 8, 2025 at 9:00 am – Changes in the Law: Civil

February 8, 2025 at 10:00 am – Changes in the Law: Federal

February 8, 2025 at 11:00 am – Changes in the Law: Probate

February 8, 2025 at 12: 30 pm – Changes in the Law: Family Law

February 8, 2025 at 1:30 pm – Changes in the Law: Criminal

March 6, 2025 at noon - Embracing Your Value as a Legal Professional: Why it Matters

March 13, 2025 at noon – Foreign Subpoenas

March 20, 2025 at noon – Civil Procedures for Discovery & The Subpoena Process

April 6, 2025 – Request for Admissions – *Coming Soon*
April 17, 2025 – Trust Administration and Funding – *Coming Soon*

In addition to the above webinars, we are hard at work scheduling the speakers for our upcoming Summer Court Series.

A few reminders. . .

When attending a Thursday webinar, you will receive an email directly from Zoom by 10am the morning of the webinar. Handouts will be uploaded to chat during the presentation and will be emailed after the presentation with the evaluation link. Due to time restraints, we are not able to send the handout prior to the webinars.

Thank you and hope to see you in Santa Cruz.

Respectfully submitted,

Janice Williams

Janice Williams, CCLS
Continuing Education Coordinator 2024-2025



OFFICE OF: HISTORIAN 2024-2025
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Third Quarterly Report

Do you know what the LPI Historian does throughout the year? The Historian captures photos and memorabilia from Conference's and meetings throughout the year. As of this year, we will no longer have a History and Scrapbook Contest. I will be working with the Executive Committee to offer my proposed changes to LPI's guidelines for the Historian position. What does this mean? As we move away from the History and Scrapbook Contests, we need everyone's help. Please continue to send me photos of your local events as well as our conferences so that I can add them to LPI's Dropbox. As Historian, I rely on all members to capture photos since I cannot be everywhere all the time. If you would like any of the photos, please email me at shannonmquigley2020@gmail.com and I would be happy to share them.

What's coming next? Well, last month I met with Heather Edwards, CCLS, our Legacy Project Chair/Curator, along with Lynne Prescott, CCLS to see how I can work with the Legacy Room to help preserve memories. Don't worry, the LPI Historian will continue to prepare Scrapbooks for all LPI Presidents but how do we preserve memories for the Legacy Room? An idea we are entertaining is to create an online Yearbook potentially in Canva. You remember those Yearbooks we all had in High School, right? I always loved them and even loved the layouts that were used. Moving forward in my last year at LPI Historian, I plan to also work with the next incoming Historian...“So That the World May Know”!

If anyone has any questions or suggestions on how to preserve LPI's memories, we are open to suggestions.

Respectfully submitted,

Shannon Quigley

Shannon Quigley
LPI Historian





OFFICE OF: CYNDEE SAUCEDA, CCLS
PROFESSIONAL DEVELOPMENT COORDINATOR
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PROFESSIONAL DEVELOPMENT COORDINATOR **FEBRUARY 2025 THIRD QUARTERLY REPORT**

We continue to stay busy and I am excited to tell you about all that is coming up.

We are now offering up to SEVEN and sometimes EIGHT webinars a month, as well as seven (7) multi-week university courses every other month. We have been offering one class per month free to all legal professionals.

Bethany Ensz's classes have been focused on Legal Research, Citations and Legal Writing. I hope you get a chance to take one of these courses soon. Bethany will be at February Conference and is teaching two seminars on Ethics. She will be teaching a 4-hour brief writing course in March that I hope you can take, as it will be a fantastic class.

June Hunter has been offering intermediate and advanced Microsoft Suite webinars and styles classes, all of which have been well attended. You always learn something new when taking one of June's classes!

We have had two Probate classes and hope to have these continue in the future twice a year.

Vanessa Buffington with NextGen has been teaching several webinars in addition to her multi-week courses. Please look for her future classes on Motions To Compel Discovery, Filing Under Seal, Expert Discovery and more coming to a Zoom near you.

Lynne Prescott, CCLS has a two-day Federal Court Practice Course coming up in March. Please don't forget to check the website regularly for all of her upcoming classes.

At Conference, check out Bethany's class at 1:45 p.m. or June's class at 3:15 p.m. (see below).

1:45 p.m. - To Rat or Not to Rat? A Deep Dive into Rule 3.8 of the Rules of Professional Conduct

3:15 p.m. - Ethics and ChatGPT: Navigating the Responsibilities of AI in Legal and Professional Practice

We are growing and have so many new offerings in the planning stages for LPI University and our Legal Technology Training! Please check out the updates on our events page on the website and make sure you are subscribed to receive our emails.



**LEGAL TECHNOLOGY
TRAINING**
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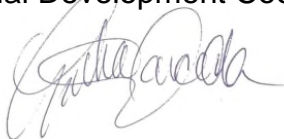


**LPI
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LPI 2025 Third Quarterly Conference
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Keep sharing and talking about our classes. We are going strong and set to reach approximately \$75,000 in revenue with a few months to go! Let us know what you would like to see in future classes.

PLEASE SHARE our Facebook and Linked In posts, print the flyers and leave them conspicuously around your office for your co-workers and last but not least, invite people to attend. Because if you tell two friends and they tell two friends and so on and so on

Professional Development Coordinator



**LEGAL TECHNOLOGY
TRAINING**

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**LPI
UNIVERSITY**



OFFICE OF: 2025 ANNUAL CONFERENCE CHAIR
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February 1, 2025

SCHOLARSHIP CHAIR CONFERENCE REPORT FEBRUARY 2025

Dear LPI Members,

I am pleased to provide an update on our Scholarship Program. We have received two entries:

Category A (High School Senior):

Taylor Luna from Mountain View High School, Mountain View, CA.

Category B (College Student):

Amy Nichole Cunningham from Wayland, KY, attending the University of the Cumberlands, majoring in Legal and Human Services.

I am excited to present these applications to our esteemed judges, who generously volunteer their time to LPI. Their dedication ensures a fair and thorough review process.

Thank you for your continued support of this important program.

Respectfully Yours,

Yolanda Gollaz

Yolanda Gollaz

LPI Scholarship Chair

Scholarship Chair 2024-2026

[RETURN TO TOC](#)



OFFICE OF: SOCIAL MEDIA CHAIR
 BETHANY ENSZ, M.S.
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Social Media • Third Quarterly Report • February 2025

Hi all! We are moving and shaking in the New Year! As a reminder, please share your selfies, photos of friends, events and presentations over the course of the weekend to your personal social media platforms. Be sure to include hashtags such as: **#LegalProfessionalsIncorporated #LegalEducation #LPIContinuingEducation #LPIUniversity #LPITechnologyTraining #MCLE #CCLS #LegalSecretary #LegalAssistant #Paralegal #Conference #MeetLPI #Legal** and/or add your own! Let's create FOMO! At the end of each conference, I would like to create a memory slide to share on social media. Please send me all the fun photos you took at the conference.

One of the newest developments in social media is the creation of the Legal Professional Incorporated LinkedIn business page. This will allow LPI to become more visible as a corporation. Currently, we have 1,031 connections on the individual page. Unfortunately, a copy and paste solution cannot be used, meaning the business page had to be created from scratch. Each connection will have to be individually asked to connect by the business page. There are a few solutions to this: 1) reach out to each person and ask them to connect, 2) make an announcement on our individual page asking our current followers to switch, and 3) everyone share we have a new page and ask our connections to follow us.

In order to continue to grow our social media numbers, I have begun creating events on Facebook. Using this tool we will create a way to see who wants to attend events or might attend events. Additionally, I would like LPI to start following more business or legal professionals on Instagram to help build our presence.

Are you following LPI on social media? Click on the logos below and **FOLLOW** for all the latest info on our upcoming classes and events. See a post that others might be interested in? Leave a **COMMENT, LIKE, and SHARE** the post to your personal or local association socials. It's a simple, informal way to invite colleagues and friends to ***embrace the journey*** with us.

FOLLOW, LIKE, COMMENT, SHARE & SUBSCRIBE!

(Click on each logo to view.) (Social Media totals current as of January 29, 2025)

	Created 2014
Followers: 789	
(+/-): +20	

	Created 2017
Connections: 1,031	
(+/-): -238	

	Created 2018
Followers: 423	
(+/-): +15	

Want to see these numbers increase? FOLLOW, LIKE, COMMENT, SHARE & SUBSCRIBE and watch the numbers grow!

If you have any ideas for social media, I am all ears. Let's have fun together.

Best,

Bethany Ensz
Social Media Chair
2025-Present