

DPLPA FULL DISCLOSURE NEWSLETTER

[ISSUE 1] [VOL. 23] [DATE: JUNE TO AUGUST 2023]



ADDRESSING THE NEEDS OF LEGAL PROFESSIONALS FOR A SECURE FUTURE

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Intro

Desert Palm Legal Professionals Association's primary purpose is continuing legal education. DPLPA and LPI provide members with many opportunities to increase knowledge and improve skills.

WELCOME!!!

MESSAGE FROM THE PRESIDENT

It is a great honor to hold this position and I am very thankful that the members of Desert Palm Legal Professionals Association (DPLPA) elected me to be this year's president.

In 2011, I met one of the original members of this great association, her name was FLORENCE ROSS. I was so intrigued by her stories, trials, and tribulations in her legal career and her continued support for the community. I was touched by her passion to keep the association going that I made her a promise to do the same.

Like many businesses, DPLPA had it tough through the pandemic and we survived because of volunteers that have their hearts set on this association to thrive.

This past year, three volunteers ran the association by committee, and I am happy to announce that we have a full board.

I have grown in many ways, and I am fully committed to this association and its members. My goal is to see other legal professionals grow in their professional capacity, self-empower, grow their network and connect with other legal professionals.

DPLPA is not just an association, it's a family of Legal Professionals.





INTRODUCING THE 2023-2024

DPLPA BOARD OF DIRECTORS

Erika Garduno, President
(dplpa.president@gmail.com)

Kathleen Gorham, Vice President
(dplpa.vp@gmail.com)

Paul Grant, Secretary
(dplpa.secretary@gmail.com)

Paul Grant, Treasurer
(dplpa.treasurer@gmail.com)

Amy Mann, Governor and Parliamentarian
(dplpa.governor@gmail.com)



CHAIRMAN POSITIONS (*appointed positions*)

Audit Chairs/Committee: Linda Lane, CCLS (President of Los Angeles Legal Secretaries Association) & Lisa DeLao (President of San Fernando Legal Secretaries Association)

Bulletin: Victoria Dean-Walters

Membership: Kathleen Gorham

Nominations & Elections: Brenda Wallace

Parliamentarian: Amy Mann, CCLS

Programs: Donna Sanchez

Scholarship: Ivette Delgadillo

Social Media: Luz Davis

Webmaster: Erika Garduno





UPCOMING WEBINARS AND EVENTS

- 6/1/2023: Webinar – What You Need to Know About Writs – June 1, 2023-FREE for LPI Members
- 6/8/2023: Webinar – Sacramento Superior Court – June 8, 2023 – Summer Court Series
- 6/13/2023: Intermediate Legal Professional Training Course Commencing June 13, 2023
- 6/20/2023 Webinar-Legal Research Overview
- 6/20/2023 DPLPA General Membership Meeting - Welcoming the members
- 6/22/2023: CCLS On-line Study Group Registration – June 22, 2023 – August 31, 2023
- 6/27/2023 Webinar – What is e-Discovery?
- 6/29/2023: Webinar – El Dorado Superior Court – June 29, 2023 – Summer Court Series
- 7/12/2023 Webinar – e-DISCOVERY: Why Adobe and File Explorer are not e-Discovery tools
- 7/13/2023 Webinar – USDC, Central District Court – Summer Court Series
- 7/18/2023 Beginning Legal Secretarial Training Online Course Commencing July 18, 2023
- 7/18/2023 Overview of California Discovery Online Class Commencing July 18, 2023
- 7/18/2023 Webinar – Secondary Authorities
- 7/25/2023 Advanced Discovery Online Class Commencing July 25, 2023
- 8/11-13/2023: LPI's First Quarterly Conference – August 11-13, 2023 (Costa Mesa, CA)

For more information see the attached flyers or visit the Legal Professional Incorporated website:
<https://www.legalprofessionalsinc.org>



WHAT SAY YOU?

ANNOUNCEMENTS!!!

Our newly elected 2023-2024 DPLPA Board was installed on April 18, 2023. Congratulations Board members. Thank you for your commitment to the success of DPLPA. A big thank you to Lori Sanford, Attorney and President of the Desert Bar Association, for taking the time to act as our installation officer.



CONGRATULATIONS to DPLPA's own Erika Garduño who was elected Legal Professionals Incorporated's Treasurer for the 2023-2024 fiscal year. Members in attendance at the Annual Conference in LAS VEGAS were Amy Mann, CCLS, Erika Garduno, Ana Moran, and Donna Sanchez (photographs on next page!!).

EMPLOYMENT OPPORTUNITY: We are currently waiting for detail information of an employment opportunity in Palm Desert (near El Paseo). If you know of an employment opportunity, let us know. For more employment opportunities, visit LPI's website for employment opportunities in the state of California. **Career Opportunities - Legal Professionals, Inc. - LPI : Legal Professionals, Inc. – LPI (legalprofessionalsinc.org)**

HELP!: Do you like to write? Do you know anyone that would like to be a ghostwriter or provide us with an article to be published in the Legal Professionals Magazine? Let us know.

THE NEXT GENERAL MEMBERSHIP MEETING IS SEPTEMBER 19, 2023.

If you would like to receive our quarterly bulletin and other event information, send us an email at dplpa.bulletin@gmail.com.

LOOK FOR US ON FACEBOOK, LINKEDIN AND INSTAGRAM!!



<https://www.instagram.com/desertpalmipa/>



<https://www.facebook.com/DPLPA/>



DESERT PALM LEGAL PROFESSIONALS ASSOCIATION | LinkedIn



LPI 89TH ANNUAL CONFERENCE RECAP

[By Amy Mann]

LPI Annual Conference in Las Vegas was amazing! President Rod Cardinale, Jr.'s new structure for conferences really streamlined the Pre and Post Board of Governor's Meetings and General Session, and provided everyone with ample time to attend educational classes and socialize! Friday, a group of LPI Members offered Speed Mentoring regarding the following positions at LPI (helpful for these positions in local associations, as well): Secretary; Governor; Treasurer; Parliamentarian; and Social Media Chair. Handouts for these sessions will be provided upon request.

On Friday night, DPLPA President, Erika Garduño did an amazing job setting up campaign table with lots of goodies: Chocolates, bookmarks, etc. On Saturday, at the General Session, LPI Rod Cardinale, Jr. announced that Erika Garduño was LPI's newly-elected Treasurer by majority vote for the 2023-2024 term. Woo Hoo!!!



The 90th Installation of Elected Officers (2023-2024) is, as follows:

LPI President: Rod Cardinale, Jr., Santa Clara County LPA

LPI Vice President: Donna Day

LPI Secretary: Bettina Jacobson

LPI Treasurer: Erika Garduño

LPI Parliamentarian, Elise Dresser, CCLS (this is an appointed office, not elected office).

All In all, the Annual Conference in Las Vegas was very informative, educational, and fun. I am so grateful to everyone who worked so hard to make this a successful event!



ABOUT DPLPA

Desert Palm Legal Professionals Association was chartered in 1953 by Legal Secretaries, Inc., now known as Legal Professionals, Incorporated, (LPI) a California Corporation. In joining the Desert Palm Legal Professionals Association, you also become a member of LPI. Dues are payable annually in advance and the fiscal year runs from May 1 to April 30. **Monthly meetings are held on Tuesdays (see the DPLPA Events section) and feature educational guest speakers.**

Desert Palm Legal Professionals Association's primary purpose is continuing legal education. Desert Palm Legal Professionals Association and Legal Professionals, Incorporated provide members with many opportunities to increase knowledge and improve skills.

LPI offers memberships in specialized areas of the law such as: litigation, probate/estate planning, family law, criminal, transactional law and law office administration. Each section provides a quarterly newsletter which contains changes and updates in the law from throughout the state.

LPI also administers the California Legal Secretary (CCLS) certification exam, for secretaries with at least three years experience. The one-day examination is given semi-annually and covers California legal procedure, legal terminology, ethics, administrative and performance skills.

BENEFITS OF MEMBERSHIP

Members of the Desert Palm Legal Professionals Association receive advance notice of all LPI publications and events as well as a yearly subscription to LPI's quarterly magazine, The Legal Professional. Additionally, Desert Palm Legal Professionals Association has a quarterly newsletter, The Full Disclosure, which provides current information on changes in the law, legal procedures, law office products and management information, interclub news and meeting notices.

More information on membership can be found on Page 12.



BIRTHDAYS!!

A birthday is just the first day of another 365-day journey around the sun. Enjoy the trip!!

Happy birthday from the DPLPA Members!!

**Samantha A. (5/1)
Kathy N. (5/17)
Ivette D. (5/26)**

**Mary P. (7/13)
Sylvian B. (7/18)
Erika G. (7/28)
Amy M. (7/29)**

**Lisa C. (8/7)
Emily W. (8/22)
Jennifer J. (8/31)**



The 2023-2024 LPI Leadership Team!

Elected Officers:

- ♦ President: Rod Cardinale, Jr. (Joined LPI in 2010)
- ♦ Vice President: Donna Day (Joined LPI in 1987)
- ♦ Executive Secretary: Bettina Jacobson (Joined LPI in 2012)
- ♦ Treasurer: Erika Garduño (Joined LPI in 2011)

Want to get in touch with one of the LPI elected officers? E-mail president@legalprofessionalsinc.org or call (800) 281-2188.

Advantages of Membership

LPI® provides educational, professional, and personal development information to legal support staff throughout the state of California. These educational opportunities are available to members (and non-members, for a nominal fee) throughout California. Monthly educational programs and newsletters are provided by local associations

General educational programs are offered at each LPI conference free to anyone registered to attend. Topics vary among specialized areas of law, ethics, law office products and management, and personal development. Click on the calendar for more information about upcoming LPI and Local Association Events.

Many local associations offer study groups for members interested in preparing to take the California Certified Legal Secretary (CCLS®) examination. LPI also offers an online CCLS Study Course. Information on the CCLS examination can be found by clicking on "California Certified Legal Secretary."

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

CODE OF ETHICS

Members of LPI adhere to the LPI Code of Ethics which is dedicated to an LPI Past President, Joan M. Moore, PLS, CCLS, and reads as follows: It shall be the duty of each member of Legal Professionals, Incorporated, to observe all laws, rules, and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence and diplomacy, in accordance with the highest standards of professional conduct.

Code of Ethics

[kōd òv e-thiks]

A set of rules and principles designed to encourage ethical conduct among a group of professionals.



California Certification Legal Secretary (CCLS®) Exam

CCLS is a program of Legal Professionals, Incorporated, (LPI) providing educational programs and professional development.

Certification is achieved by passing a comprehensive examination. Candidates are tested in California legal procedures, legal terminology, performance skills, reasoning and ethics, law office administration, communications, and legal computations. A minimum of two years experience is required. Continuing legal education requirements must be met . See application on next page.

Benefits of Certification

- Qualify for professional, personal and economic reward
- Improve your knowledge of California legal practice and procedure
- Broaden your opportunities for job advancement
- Enhance your self-confidence and self-esteem
- Gain further recognition and respect within the legal environment

For more information, go to the LPI website:

<https://www.legalprofessionalsinc.org/ccls-applicants/>



CCLS SAMPLE TEST QUESTIONS

California Legal Procedures

1. When a summons and complaint is accomplished by mail service on a person outside California, the responding party has _____ days from the date of mailing to respond to the summons and complaint.
A. [10]
B. [20]
C. [30]
D. [40]
2. The procedures for obtaining discovery in family law matters are the same as in general civil procedures.
[] True
[] False

Reasoning and Ethics

1. The duty of confidentiality continues after the client/lawyer relationship has terminated and even after the client's death.
[] True
[] False
2. The opposing side in a transaction sends your office the stock certificates your client purchased in the deal. You open the package containing the certificates. What duties does your law office have?
[A] Notify the client to pay any charges associated with the stock certificates.
[B] Send the certificates to the client.
[C] Identify and label the securities upon receipt, and place them in a safe deposit box or other place for safekeeping as soon as possible.
[D] Maintain the records for a year.
3. In order to provide some protection to the public, California law requires every notary public to file an official bond in the amount of:
[A] \$10,000
[B] \$15,000
[C] \$20,000
4. You often tell your husband about the estates with which you are involved at work. You believe that so long as you don't tell your husband the names (you refer to the cases as "Mr. A's estate" or "Ms. B's will") you have not divulged any secrets. Which option describes your action?
[A] A legal secretary would show initiative and good judgment doing this.
[B] It would be in appropriate for legal secretary to do this.
[C] It would be unethical for a legal secretary to do this.

ANSWERS ON LAST PAGE

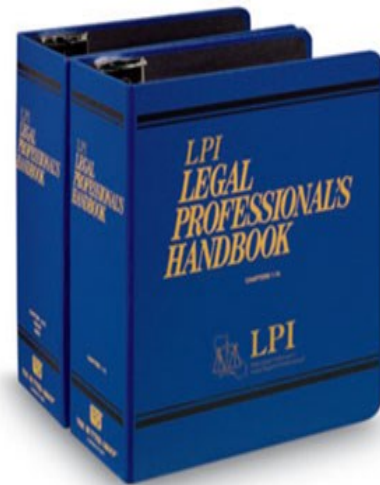
LEGAL PUBLICATIONS

LPI Legal Professional's Handbook

The most clear, concise procedural handbook for California courts on the market! Cross-references to code sections and other legal publications.

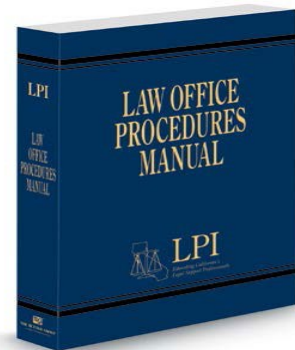
23 separate chapters giving deadlines and step-by-step instructions on what to do and how to do it. Reviewed and used by professionals throughout the state. Updated and reviewed annually by working members of the legal profession.

These books are published through The Rutter Group and may be ordered by contacting 800-747-3161 extension 2, or through its website by [clicking here](#). Members of Legal Professionals, Incorporated, receive a 30% discount for these publications. To receive the discount, LPI members should call The Rutter Group and tell them you are an LPI Member.



A procedural handbook for California courts, and an ideal training manual for new legal staff. A concise training tool covering most areas of the law – civil, family law, bankruptcy, criminal, corporate, and more. Includes cross-references to code sections and other legal publications, examples of legal forms and step-by-step instructions for completing them. Also includes procedural checklists and a glossary of legal terms. Law Office Procedures Manual is updated twice a year.

This book is published through The Rutter Group and may be ordered by contacting 800-747-3161, extension 2, or through its website by [clicking here](#). Members of Legal Professionals, Incorporated, receive a discounted rate for this publication.



Both these books are on the study list for those considering taking the California Certified Legal Secretary Examination.

BECOME *A Member*

MEMBERSHIP: Membership is for anyone that works in the legal field (secretaries, paralegals, receptionists, court reporters, court clerks, attorneys, process servers, legal administrators, etc.). For only \$70.00 which is the annual dues for Desert Palm Legal Professionals Association and Legal Professionals Incorporated.



WHAT ARE THE BENEFITS?

- Monthly educational programs (at least 2 webinars a month).
- General educational programs are offered at each conference and are free to anyone registered to attend. Topics vary among specialized areas of law, ethics, law office products and management, and personal development.
- Legal Professionals Magazine.
- Scholarship Program.
- Build a network of knowledge by meeting other legal professionals.
- Discount to the Legal Professional's Handbook, Law Office Procedures Manual, Legal Secretary's Reference Guide, and Recorded Webinars for Sale.
- Become a California Certified Legal Secretary (CCLS®) through a course of study and a comprehensive examination.
- Members may receive discounts for certain educational seminars for example (technology, beginning and advanced legal secretary training) and publications offered through Continuing Education of the Bar (CEB).
- Learn basic secretarial and computer skills.
- Enroll in a legal secretarial or paralegal course through business schools and college courses (at an additional low cost).
- Enroll in a training course offered by a Legal Professionals, Incorporated, association in your area, or through LPI's online courses (at an additional low cost).
- Subscribe to the blog. Here is the link LPI Blog - THE PODIUM - Legal Professionals, Inc.

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1) click on the LINK; 2) Select **Desert Palm Legal Professionals Association** and complete the online form; and 3) Please forward your receipt/confirmation to dplpa.vp@gmail.com and cc dplpa.treasurer@gmail.com

**BECOME A
MEMBER NOW!**



APPLICATION FOR MEMBERSHIP IN
DESERT PALM LEGAL PROFESSIONALS ASSOCIATION



Name of Applicant: _____ Fiscal Year: **2023-2024**

Type of Membership:

- ☐ Active (Directly engaged in work of a legal nature in California)
☐ Student (Enrolled in a course of study leading to employment in the legal profession) *
☐ Associate (Actively seeking employment in the legal profession)

* Name of school you are attending (if you are applying for Student Membership): _____

Name:		Contact Phone for Roster:		Birthday (mm/dd)	
Home Address:		City:	State:	Zip:	
Employer Name:		Work Phone:		Ext.:	
Work Address:		City:	State:	Zip:	
Personal Email:		Work Email:			
Preferred E-mail address for Roster:		Preferred Mailing Address:		The Legal Professionals magazine will be delivered via	
<input type="checkbox"/> Business <input type="checkbox"/> Home		<input type="checkbox"/> Business <input type="checkbox"/> Home		<input type="checkbox"/> Email <input type="checkbox"/> Mail	

CODE OF ETHICS

Members of Legal Professionals, Incorporated, are bound by the objectives of this Association and the standards of conduct required of the legal profession:

It shall be the duty of each member of Legal Professionals, Incorporated, to observe all laws, rules and regulations now and hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence, and diplomacy, in accordance with the highest standards of professional conduct.

(Dedicated to the memory of Joan M. Moore, PLS, CCLS, LPI President 1980-1982)

I have read and agree to be bound by the Code of Ethics of Legal Professionals, Incorporated, as set forth above.

Signature of Applicant: _____ **Date:** _____

SPONSOR: _____

Annual dues are \$70.00. The fiscal year is from May 1st to April 31st. This fee is non-refundable after 15 days from confirmation of receipt of payment. For faster processing, electronic payment is available through our website. www.dplpa.org or make a check payable to **DPLPA** along with this membership form.

DPLPA, c/o Membership, P.O. Box 5166, Palm Springs, CA 92263
OR by email to dplpa.vp@gmail.com and dplpa.treasurer@gmail.com

APPLICATION APPROVED ON: _____ **LPI PER CAPITA PAID ON:** _____



LPI is "Coasting to Costa Mesa" this August!

- Outstanding Educational Workshops and Speakers
- Legal Technology Training Sessions
- Professional Networking
- Industry Vendors

HOTEL INFO

Hilton Orange County/Costa Mesa
3050 Bristol Street
Costa Mesa, CA 92626
1-800-HILTONS



Double/King: \$179/night (plus 11.464% tax)

*Discounted Overnight Parking: \$20
Parking for Day of Event: \$10*

Booking link: Available Rooms - Hilton Orange County/Costa Mesa

FULL SCRIP PRICE: \$205 (BY 7/10/23)*

Includes:

- Registration
- Saturday Continental Breakfast
- Saturday Roundtable Luncheon
- Saturday Banquet
- Sunday Continental Brunch

*\$10 Late Fee Applies After 7/10/23

INDIVIDUAL TICKETS (BY 7/10/23)*

Registration	\$30*
Saturday Continental Breakfast	\$30
Saturday Roundtable Luncheon	\$40
Saturday Banquet (Slow-Braised Ribs or Vegetarian)	\$75
Sunday Continental Brunch	\$30
Optional Friday Night Social Event (Taco Bar)	\$30



CONTINUING LEGAL
EDUCATION

2023

Summer Court Series

JUNE 2023

Thursday, June 8 - Sacramento Superior Court

Thursday, June 29 - El Dorado Superior Court

JULY 2023

Thursday, July 13 - USDC, Central District Court

Thursday, July 20 - Placer Superior Court

Thursday, July 27 - USDC, Southern District Court

AUGUST 2023

Thursday, August 24 - San Francisco Superior Court

And More to Come!

THURSDAYS • 12:00 P.M. - 1:00 P.M.

- LPI MEMBER / LOCAL ASSOCIATION MEMBER - FREE!
- NON-MEMBER OR ATTORNEY - \$55
- LPI CLASS PASS

Online Registration & Payment
LegalProfessionalsInc.org/Events



LPI CONTINUING LEGAL EDUCATION IS A PROGRAM OF LEGAL PROFESSIONALS INCORPORATED, AN APPROVED PROVIDER, AND CERTIFIES THAT EACH OF THESE WEBINARS HAVE BEEN APPROVED FOR MINIMUM CONTINUING EDUCATION CREDIT IN THE AMOUNT OF 1.0 HOUR BY THE STATE BAR OF CALIFORNIA.





CCLS ON-LINE STUDY GROUP

June 22, 2023 – August 31, 2023



If you are interested in studying for the California Certified Legal Secretary (“CCLS”) Exam,** join LPI’s CCLS On-Line Study Group. During the Study Group, all topics covered in the CCLS exam will be reviewed (*Please see the CCLS Information Kit on LPI’s website for a description of the sections covered on the exam*).

Lectures and materials will be posted by no later than 7 p.m. on Sundays. Students may complete the material at their convenience. Access information will be provided upon enrollment in the class.

Individual modules are available for purchase for each section covered.

If you only need to study for certain sections, you may purchase individual modules at any time during the then-current Study Group class. You may also purchase all sections if you prefer to study on your own.

Reminder – all material is intended for individual use only, and not for local association study groups

Students will be provided with homework and handouts. Students now have the option to include the ***Law Office Procedures Manual (LOPM) in their registration (see below for pricing)***. The other reading materials, such as ***The California Style Manual (4th Ed.)***, ***The Redbook by Bryan A. Garner***, and ***Pocket Guide to Legal Ethics***, (*available on Amazon.com*) are required NO LATER THAN the start of class. Students are also encouraged to have the CCLS Study Guide.

For full information, please go to LPI’s website here:

[Events Calendar - Legal Professionals, Inc. - LPI : Legal Professionals, Inc. – LPI \(legalprofessionalsinc.org\)](https://www.legalprofessionalsinc.org/events-calendar)

****All examinees must meet eligibility guidelines outlined in the CCLS Information Kit on LPI’s website.**

REGISTRATION FEES:

10-Week Study Group (without the Law Office Procedures Manual):

First time participation:	\$100 Members	\$150 Non-Member
Subsequent participation:	\$ 50 Members	\$ 75 Non-Members

10-Week Study Group (including the Law Office Procedures Manual):

First time participation:	\$219 Members	\$269 Non-Member
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****REGISTRATION MUST BE RECEIVED BY JUNE 8, IN ORDER TO RECEIVE THE LAW OFFICE PROCEDURES MANUAL PRIOR TO THE START OF THE CLASS**

Individual Modules: (\$15 each Members; \$25 each Non-Members)

California Legal Procedure	Legal Terminology	Legal Computations
Skills	Reasoning & Ethics	
Law Office Administration	Ability to Communicate Effectively	

DEADLINE TO REGISTER (no LOPM) IS JUNE 15, 2023. NO REFUNDS AFTER JULY 6, 2023.

If you have any questions, please contact Vivian Shreve, CCLS, cclschair@legalprofessionalsinc.org.



LEGAL TECHNOLOGY TRAINING

e-DISCOVERY: Why Adobe and File Explorer are not e-Discovery tools

TECHNOLOGY TRAINING

PRESENTED BY:

JUNE HUNTER

July 12, 2023

12:00 P.M.-1:00 P.M.

LPI Member Non-LPI member

\$25

\$55

**IN THIS WORKSHOP, YOU
WILL LEARN HOW TO
UTILIZE FILES, COPY FILES
WITHOUT DISTURBING
METADATA, AND
OTHER METHODS.**



To Register, go to our website:
<https://www.legalprofessionalsinc.org/events>
or Click the QR code above.

No cancellations or refunds are provided after the webinar; however, should a cancellation occur at least 48 hours before the live webinar, LPI will issue a full refund.

For further information or group registrations email: training@legalprofessionalsinc.org

About the Trainer

June Hunter is a Technical Enablement Sr. Specialist at DISCO and teaches computer essentials at UC San Diego Extension in their ABA-approved Paralegal Studies program.



June Hunter is an affiliate of Legal Professionals, Incorporated, an approved provider, and certifies that this activity is approved for 1.0 hours of MCLE of CCLS credit.



***Eight-Week
Program
*Self-Paced!**



**LPI
UNIVERSITY**



Beginning Legal Secretarial Training

**Online Course Commencing
JULY 18, 2023**



NextGen Legal and LPI University are offering this eight-week, online Beginning Legal Secretarial Training Course. You will be able to work at your own pace.

Cost

\$180 LPI members

\$280 non-LPI members

(includes local association membership, subject to approval)

Cost includes a Legal Secretary's Reference Guide.

Each individual must register separately. Upon completion of the course, students will receive a certificate from LPI.

Classes will take place online utilizing video lectures, discussion boards, email, live Q&A sessions and quizzes. Login information will be provided the day before the class is scheduled to begin.

TOPICS COVERED INCLUDE:

- Introduction to the Law Office
- Duties of the Legal Secretary
- Effective Telephone Skills
- Effective Oral Communication Skills
- Calendaring and Timetables
- Basic Grammar Skills
- Transcription and Proofreading Techniques
- Court Structure
- Citations
- Service of Legal Documents
- Preparing a Proper Caption
- Preparation of Documents Filed with the Court
- Basics of Civil Litigation
- Interrogatories
- Demand for Production of Documents
- Request for Admissions
- Depositions/Deposition Subpoenas
- Demand for Physical Examinations
- Discovery Timelines
- Service
- Verifications



**To Register go to our website:
<https://www.legalprofessionalsinc.org/events>
or Click the QR code.**

WWW.LEGALPROFESSIONALSINC.ORG

Secondary Authorities

July 18, 2023

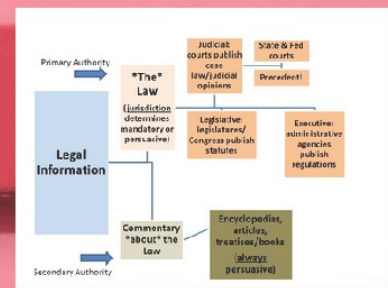
12:00 P.M. - 1:00 P.M.

PRESENTED BY:
BETHANY S. ENSZ, M.S.

MEET LPI'S
NEWEST
INSTRUCTOR!



This webinar is an overview of secondary authorities and finding tools. With this focus, attendees will benefit from an interactive dive into understanding these authorities and tools, the benefits these sources and tools offer, and will come away with actionable strategies to effectively navigate them.



Secondary Sources:

- *ALRs
- *Encyclopedias
- *Law Reviews
- *Restatements
- *Treatises

LPI Member Non-LPI Member
 \$25 \$55



To Register, go to our website:
<https://www.legalprofessionalsinc.org/events>
 or Click the QR code above.

ABOUT THE TRAINER

Bethany S. Enszt, M.S., works as a Legal Research and Analysis instructor at UCSD Division of Extended Studies. Before teaching, Bethany worked as a corporate paralegal and office manager for Breakwater Law Group, LLP. Prior to joining Breakwater, Bethany was with Sheppard, Mullin, Richter & Hampton LLP. She started her legal career with McKenna Long & Aldridge LLP (now Dentons). Bethany graduated from Indiana University with a Bachelor of Science in Criminal Justice and a minor in Psychology, and earned a Master of Science in Legal Studies from the University of San Diego School of Law. She earned her paralegal certification from UCSD Division of Extended Studies, where she was inducted into the LEX Honor Society.

BETHANY ENSZ IS AN AFFILIATE OF LEGAL PROFESSIONALS, INC., AN APPROVED PROVIDER, AND CERTIFIES THAT THIS SEMINAR IS APPROVED FOR MINIMUM CONTINUING EDUCATION LEGAL CREDIT IN THE AMOUNT OF 1.0 HOUR BY THE STATE BAR OF CALIFORNIA.



NextGen Legal and LPI University are offering this six-week, online Advanced Discovery course. You will be able to work at your own pace.

COST

\$200 LPI MEMBERS

\$300 NON-LPI MEMBERS

(includes local association membership subject to approval)

Cost includes an Advanced Discovery Reference Guide.

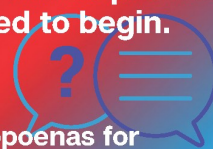
Each individual must register separately. Upon completion of the course, students will receive a certificate from LPI.

ADVANCED DISCOVERY

ONLINE COURSE
COMMENCING JULY 25, 2023



Classes will take place online utilizing email, live Q&A sessions and quizzes. Login information will be provided the day before the class is scheduled to begin.

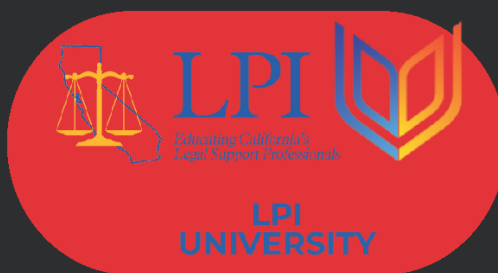


- Drafting Interrogatories (Form, Contention and Special Interrogatories)
- Drafting Demand for Production of Documents
- Drafting Requests for Admissions
- Drafting Deposition Notices
- Drafting Demand for Physical Examinations
- Drafting Deposition Subpoenas
- Drafting Subpoenas for Production of Documents
- Motions to Quash
- Answering Interrogatories
- Answering Demand for Production of Documents
- Answering Requests for Admissions
- Objections to Discovery Requests
- Meet and Confer Letters
- Motions to Compel Further Responses



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TOPICS COVERED INCLUDE:

- Interrogatories
- Demand for Production of Documents
- Requests for Admissions
- Depositions
- Demand for Physical Examinations
- Deposition Subpoenas
- Discovery Timelines and Service
- Verifications



The modules for this class will be taken from the Beginning Legal Secretarial Training course and is intended for people that have worked in a law office but are new to civil discovery.

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ANSWERS TO CCLS SAMPLE TEST QUESTIONS [page 10]

CALIFORNIA LEGAL PROCEDURES

<u>No.</u>	<u>Answer</u>	<u>Authority</u>
1.	D	LPI Law Office Procedures Manual, Ch. B, Sec. V (A)(5), (B- 28); Code Civ. Proc. §415.40
2.	A	LPI Law Office Procedures Manual, Ch. H, Sec. II, (E)(2), (H- 18)

REASONING AND ETHICS

<u>No.</u>	<u>Answer</u>	<u>Authority</u>
1.	A	Pocket Guide to Legal Ethics, Ch. 5
2.	C	California Rules of Professional Conduct, Rule 4-100
3.	B	Secretary of State, Notary Public Handbook
4.	C	California Rules of Professional Conduct, Rule 3-100