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ADDRESSING THE NEEDS OF LEGAL PROFESSIONALS FOR A SECURE FUTURE.

# Full Disclosure

## *DPLPA*

### *Newsletter*

## *Intro*

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

# WELCOME!!

### MESSAGE FROM PRESIDENT

By David Tennison

**D**ear Members and Friends of Desert Palms Legal Professionals,

Here we are three months into another wonderful year. I hope all of your expectations for the New Year are coming true. Please join us for our March 13, 2012, meeting. We will be welcoming Sue Ryan, Esq., the Managing Self-Help Attorney for The Riverside County Superior Court. She will be speaking about self-help programs available to litigants in Family Law, Small Claims, and Unlawful Detainer Actions. We will also be holding our annual election of officers. Please join us and let your voice be heard. Also remember that Annual Conference will be held this year in beautiful San Diego. Please let me know if you are interested in attending. Lastly, I would like to thank everyone for your help and support during my three years as president. It has been a wonderful and fulfilling experience. I hope to see everyone on the 13<sup>th</sup> !!!



# Meet Our DPLPA Boards of Directors (2011/2012)

**David G. Tennison, President**  
The Mack Law Offices  
[Dave@TheMackLawOffices.com](mailto:Dave@TheMackLawOffices.com)

**Joleen Leonard, Secretary**  
Law Offices Of Naran Reitman  
[jleonard@reitmanlaw.com](mailto:jleonard@reitmanlaw.com)

**Donna Ellis, Governor**  
Law Offices Of Brian M. Lewis.  
[donna.ellis@lawlewis.com](mailto:donna.ellis@lawlewis.com)

**Erika Garduno, Editor/Advertisement**  
Slovak Baron & Empey LLP  
[Erika.Garduno@hotmail.com](mailto:Erika.Garduno@hotmail.com)

**Patricia Pierce, Vice President**  
Sanger & Manes LLP  
[PPierce@sangerlaw.com](mailto:PPierce@sangerlaw.com)

**Donna Bleyl, Treasurer**  
(760) 320-8889  
[Tactics2001@msn.com](mailto:Tactics2001@msn.com)

**Florence Ross, Parliamentarian**  
Schlecht, Shevlin & Shoenberger  
(760) 320-7161

*To become a member of the DPLPA, please fill out the attached application and submit it at any DPLPA events along with the annual fee payable to DPLPA. Please visit our Website. <http://www.dplpa.org>*

## Benefits of Membership

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

To view detailed information about the benefits of membership, please visit our website. <http://www.dplpa.org>

To view and print an application for membership, please print page 6. Adobe Acrobat is required to view this download. If you do not have Adobe Acrobat installed, you may download it for free.

## More About DPLPA

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

Desert Palm Legal Professionals Association's primary purpose is continuing legal education. Desert Palm Legal Professionals Association and LSI provide members with many opportunities to increase knowledge and improve skills. Classes and seminars are sponsored in addition to the educational speakers featured at monthly Desert Palm Legal Professionals meetings.

LSI 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.

We also administer 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.



### DPLPA EVENTS

Regular Meetings listed below:

March 13, 2012  
April 10, 2012  
June 12, 2012  
September 11, 2012  
November 13, 2012  
December 11, 2012

Meetings will be held at:  
The Clubhouse at **Desert Falls Country Club**  
1111 Desert Falls, Palm Desert  
(Corner of Cook Street & Country Club Drive, entrance north of Country Club Drive on Country Club Drive (If any changes, members will be notified via Email.)

### 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

**February:**  
Kathleen Gorham

**March:**  
Donna M. Ellis

**April:**  
Donna J. Bleyl  
Wilma H. Ertel

**MINUTES OF THE REGULAR BUSINESS MEETING**  
**MEETING DATE: JANUARY 10, 2012**  
**DESERT PALM LEGAL PROFESSIONALS ASSOCIATION**

**Call to Order:** A regular meeting of the Desert Palm Legal Professionals Association was held at Desert Falls Country Club, Palm Desert, California, on January 10, 2012. President David Tennison presided over the meeting. A quorum was confirmed.

**Introductions:** The President led the Pledge of Allegiance, introduced Jason Connolly, the evening's speaker, and called for the introductions of the members and guests.

**Speaker:** Mr. Connolly, a paralegal with Sanger & Manes, provided valuable information regarding the IRS and handed out specific IRS forms to guide the average taxpayer through the IRS maze of tax laws.

**Approval of the Treasurer's Report:** The Treasurer's Report submitted by Donna Bleyl was confirmed pending audit.

**Approval of Memorandum and Minutes:** The November Minutes corrected to reflect the correct spelling of Tennison and the deposit into the scholarship fund of \$1000. After corrections, the members approved the November 8, 2011, regular business meeting Minutes as printed and distributed to the members.

**New Business:**

1. Joleen Leonard formally appointed as the Secretary of DPLPA.
2. The President presented the 2012-2013 Desert Falls contract for approval by the members. After discussion, the President requested that Attorney Matthew Baron review the contract and provide the members with his evaluation of the contract.
3. Donna Ellis and Jennifer Ellis stated their intention of attending the February LSI Quarterly Conference.

4. Becki Canela agreed to act as Chairperson of the Nominations & Elections Committee, with Erika Garduno and Jordyn Gibbs assisting.
5. After discussion, the members waived the bylaws provisions requiring one year service on the board of directors for President and Vice President and one year membership for Secretary and Treasurer.
6. After discussion, the members agreed that the voting for elections of officers could be conducted by email vote for those members not attending the March 13, 2012 meeting.
7. The members agreed that Patricia Pierce will chair the Bylaws Revision Committee, with Kathleen Gorham and Sue Sartain assisting. Sylvia Chernick will act as consultant.
8. The members discussed the LSI name change and voted for the name change for the Governor to vote at the February LSI conference.

**Reports:**

None.

**Announcements:**

No announcements.

**Adjournment:**

March 13, 2012, at 6:00 P.M. at Desert Falls Country Club, Palm Desert, California, were fixed as the date, time and place of the next regular meeting. The January 10, 2012 meeting was adjourned at 8:30 P.M.

Respectfully submitted,

---

Patricia Pierce, Acting Secretary

**2012/2013 APPLICATION FOR MEMBERSHIP IN DESERT PALM LEGAL PROFESSIONALS ASSOCIATION**

COMPLETE AND DELIVER THIS APPLICATION WITH YOUR CHECK FOR \$40 PAYABLE TO "DPLPA" (which includes local dues and Legal Secretaries Incorporated (LSI) per capita tax from May 1 to April 30) TO:

Donna J. Bleyl  
77-060 Indiana Avenue  
Palm Desert, CA 92211

NAME OF APPLICANT: \_\_\_\_\_ EMPLOYER: \_\_\_\_\_

PREFERRED MAILING ADDRESS: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ Home Telephone: \_\_\_\_\_  
Office Telephone: \_\_\_\_\_  
Office Fax: \_\_\_\_\_

Your Birthday (month and day) \_\_\_\_/\_\_\_\_ E-Mail Address: \_\_\_\_\_

EMPLOYMENT IN LEGAL FIELD (Include positions, dates for last five years): Litigation Secretary (2007-present)

IF ACCEPTED AS A MEMBER, I AGREE TO BE BOUND BY THE BYLAWS OF AND THE STANDING RULES OF LEGAL SECRETARIES, INCORPORATED AND THE LOCAL ASSOCIATION TO WHICH I HEREBY APPLY FOR MEMBERSHIP, INCLUDING THE FOLLOWING CODE OF ETHICS:

*It shall be the duty of each member of LSI to observe all laws, rules and regulations now or hereafter in effect relating to confidentiality and privileged communications 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, LSI President 1980-1982)*

\_\_\_\_\_  
SIGNATURE OF APPLICANT DATE: \_\_\_\_\_

\_\_\_\_\_  
SIGNATURE OF SPONSOR

**LSI members are eligible for membership in the following LSI legal specialization sections:**

ANNUAL DUES FOR LSI MEMBERS (AS OF FEBRUARY 2001) ARE \$20.00 FOR EACH SPECIALIZATION SECTION OR \$75.00 FOR ALL SIX SECTIONS:

**CIVIL LITIGATION  
LAW OFFICE ADMINISTRATION**

**CRIMINAL LAW  
PROBATE/ESTATE PLANNING**

**FAMILY LAW  
TRANSACTIONAL LAW**

LSI LEGAL SPECIALIZATION SECTION MEMBERSHIP INCLUDES: (1) QUARTERLY SECTION NEWSLETTERS; (2) FREE QUARTERLY CONFERENCE WORKSHOPS; (3) REDUCED REGISTRATION FEES FOR REGIONAL SPECIALIZATION SECTION SEMINARS; AND (4) STATEWIDE ROSTER LISTING EACH SECTION MEMBER'S NAME, ADDRESS, TELEPHONE NUMBER, EXPERTISE AND GEOGRAPHICAL AREA WITH WHICH FAMILIAR.

TO REQUEST LSI SPECIALIZATION SECTION MEMBERSHIP INFORMATION, COPY THIS ENTIRE PAGE AND MAIL THE COPY TO: LEGAL SPECIALIZATION COORDINATOR, LSI CORPORATE OFFICE, 12852 HORTENSE STREET, STUDIO CITY, CA 91604-1123.

TO ALL ATTORNEYS, PARALEGALS, AND LEGAL PROFESSIONALS



## DESERT PALM LEGAL PROFESSIONALS ASSOCIATION

**TUESDAY • MARCH 13, 2012**

General Membership Meeting

Social at 5:30 P. M.; Dinner/Program at 6:00 P. M.

**A Presentation Regarding Self-Help Programs  
Available to Litigants in Family Law, Small Claims,  
Unlawful Detainers and Beyond!**

Sue Ryan, Esq., Managing Self-Help Attorney  
Riverside County Superior Court

Susan Ryan, Esq. is the Managing Self-Help Attorney for Riverside County Superior Court. Ms. Ryan supervises the Court's Self-Help Center, Small Claims Advisory, and Office of the Family Law Facilitator. Ms. Ryan previously worked as a Family Law Facilitator and Small Claims Legal Advisor. Prior to coming to the Court, Ms. Ryan worked in public entity law, including as a Deputy City Attorney for the City of Escondido, where Ms. Ryan was a civil litigator. Ms. Ryan graduated from National University School of Law in 1993.

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**LOCATION:** Desert Falls County Club  
1111 Desert Falls Parkway  
(Country Club Drive & Desert Falls Parkway)  
Palm Desert, CA 92260

**MENU:** Buffet (non-alcoholic refreshment included)

**PRICE:** \$26

RSVP by Noon on Thursday • March 8, 2012, to  
Patricia Pierce at [ppierce@sangerlaw.com](mailto:ppierce@sangerlaw.com) or [pspatricia@aim.com](mailto:pspatricia@aim.com)  
or 760.320.7421

# DPLPA' Scholarship

**E**ach year Desert Palm Legal Professionals Association offers a scholarship to students enrolled in a college, university or business school offering a degree or certificate of completion upon graduation for a course of study in the legal field, i.e., paralegals, legal assistants, legal secretaries, law office receptionists, court reporters, etc.

**Scholarship Criteria:** Applications and accompanying documents must be submitted to DPLPA not later than April 15th each year. Scholarships are awarded based on:

- applicant's desire for a career / position in the legal field;
- applicant's academic achievement (GPA);
- applicant's financial need; and
- applicant's personal characteristics, aspirations and goals.

**Announcement of Award:** Recipients will be notified by DPLPA by mid-May each year via mail following the DPLPA business meeting. Completed applications must be mailed and postmarked to the DPLPA Scholarship Committee on or before the April 15th deadline.

Visit our website: <http://www.dplpa.org>

## Employment Opportunity

**If you have any employment opportunity, please submit your post to:**

[Erika.Garduno@hotmail.com](mailto:Erika.Garduno@hotmail.com)

### YOUR VOICE COUNTS

If you wrote any articles, have any photos, comments/opinions, ideas, employment opportunities to share with the rest of the world or inquiries, please submit your request (YOUR VOICE COUNTS) to:

[Erika.Garduno@hotmail.com](mailto:Erika.Garduno@hotmail.com)

YOUR VOICE... could be in our next issue.

### FOOD FOR THOUGHT

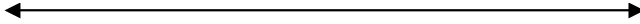
"The opposite of love is not hate, it's indifference. The opposite of art is not ugliness, it's indifference. The opposite of faith is not heresy, it's indifference. And the opposite of life is not death, it's indifference."

— [Elie Wiesel](#)





# GOOD READING



FOLLOW UP TO ISSUE 1, VOL12 - WILLS AND TRUSTS ARTICLE...

## WILLS & TRUST

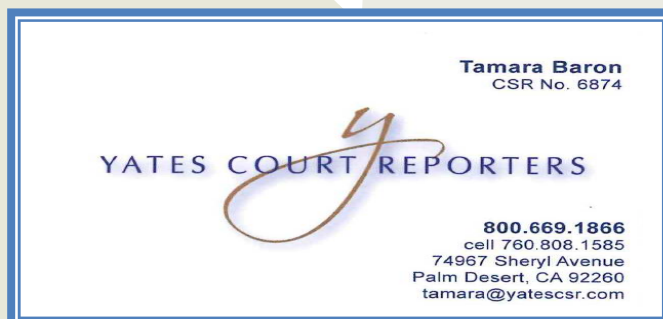
BY Kathleen Gorham  
Slovak Baron & Empey LLP

First, I wanted to correct something I wrote in last month's article. The sentence was, "Sure, you're not taking any wealth you have with you but don't you want it to go to your family rather than to pay your hospital bill or other creditors?"

Every time I see this sentence, it makes me cringe. It sounds like I'm saying don't bother paying your bills and that is not what I meant, at all. After Jason Connolly's very informative talk on "IRS and Taxpayers: Can They Work Together" at the January 10<sup>th</sup> General Membership Meeting (which was quite good), I really got to thinking (and regretting) the way this one sentence sounded.

What I wanted to say is that whether you are leaving behind a car, some furniture, two gold rings, a partridge in a pear tree or perhaps a whole lot more, have your things (your estate) planned out so that if you do have debt, your beneficiaries are not burdened with it to the extent they have to figure it out while wondering how the roof is going to stay over their heads. Make it easy for your family by setting up an Estate Plan with an attorney and appointing the right person to oversee that your wishes are carried out. A Trust for your children can protect the assets you transfer to it so that they may have something for their future just as if you were alive to give it to them. Of course, we all want to be responsible in paying our bills and debts and as we learned from Jason, this definitely includes taxes, but I wanted to let people know not to be afraid of this subject, to not be intimidated to consult with an attorney, and most importantly to let people know that it isn't expensive at all to do an estate plan. The cost is about what most of us spent on the holidays last December!

Thank you so much for re-visiting this subject with me again!



## Code of Ethics

Members of DPLPA adhere to the Code of Ethics which is dedicated to an LSI Past President, Joan M. Moore, PLS, CCLS, and reads as follows:

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



**(LSI) Membership Benefits/Advantages ([www.lsi.org](http://www.lsi.org))**

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

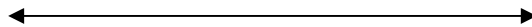
Monthly educational programs and newsletters are provided by local associations

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

Members (and non-members) are given the opportunity to join one or all six Legal Specialization Sections. Each specialization section offers seminars and newsletters on specific areas of law. Seminars are presented at each LSI quarterly and annual conference free to LSI section members and at a reduced cost to non-section members. For more information, click on "Legal Specialization Sections."

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

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

**Why Become a Legal Professional?**

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

**How you can become a Legal Secretary Professional?**

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

**Why Join Legal Secretaries, Incorporated?**

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

 [CCLS Workshop Reg. Form](#)

**LSI® EVENTS**

**May 17-20, 2012**  
78th Annual Conference  
San Diego, CA  
*Hosted by Imperial County LPA  
and San Diego LSA*

 <http://www.lsi.org/pdf/May-2012-Conference-Registration.pdf>

 <http://www.lsi.org/pdf/May-2012-Hotel-Reservation.pdf>

 <http://www.lsi.org/pdf/May-2012-LSS-RSVP.pdf>



**August 17-19, 2012**  
August Conference  
Hilton Pleasanton at the Club  
Pleasanton  
*Hosted by Alameda County LSA  
and Livermore-Amador Valley  
LPA*



**November 2012 Conference**  
November 16-18, 2012  
Palm Springs Hilton  
*Host Association: Desert Palm  
LPA*



## **BENEFITS**

### **LEGAL SECRETARIES INCORPORATED (LSI)**

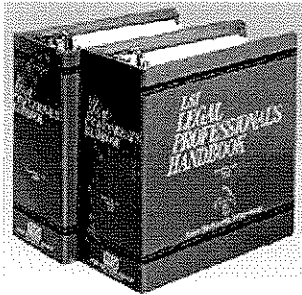
*Note: This list is maintained for use by members of Legal Secretaries, Inc. Agents for insurance and financial providers are available as resources when members inquire about benefits. Please use this as a starting point; ask for information, compare policy coverage and prices. LSI wants its members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

<p style="text-align: center;"><b>DISCOUNT THROUGH CEB</b></p> <p>Members of Legal Secretaries, Incorporated are offered a reduced cost for certain educational benefits (seminars, publications) through Continuing Education of the Bar. For more information, visit <a href="http://ceb.com/LSI/">http://ceb.com/LSI/</a></p>	<p style="text-align: center;"><b>WORKING ADVANTAGE</b> Toll Free: (800) 565-3712 <a href="http://www.workingadvantage.com">www.workingadvantage.com</a></p> <p>Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more. Member ID: Contact LSI Corporate Office, <a href="mailto:lsicorp@suddenlink.com">lsicorp@suddenlink.com</a> or LSI Vice President</p>
<p style="text-align: center;"><b>HERTZ CORPORATION</b> Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 <a href="http://www.hertz.com">www.hertz.com</a></p>	
<b>INSURANCE AND FINANCIAL PROVIDERS</b>	
<p style="text-align: center;"><b>AFLAC AND WORKER'S COMPENSATION QUOTES</b> Steven C. Dannenberg (Independent Broker) 11091 Rhyolite Drive, Suite 4 Redding, CA 96003 Direct: (530) 339-5889 - Office: (530) 243-9879 Fax: (530) 243-9880 E-mail: <a href="mailto:dannenberginsurance@gmail.com">dannenberginsurance@gmail.com</a> Offering supplemental insurance for Accident, Sickness, Cancer, Dental, Hospital Indemnity and Heart Attack/Stroke.</p>	<p style="text-align: center;"><b>CAPITAL INVESTMENT ADVISERS</b> Emerson J. Fersch, CFP, ChFC, CLU, CASL 5000 E. Spring Street, Suite 200 Long Beach, CA 90815 Office: (562) 420-9009 or (877) 270-9342 Fax: (562) 420-9955 <a href="http://www.ciadvisers.com">www.ciadvisers.com</a> Offering Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, and Comprehensive Financial Planning</p>
<p style="text-align: center;"><b>DWORKIN INSURANCE SERVICES</b> Earl Dworkin 467 Hamilton Avenue, Suite 1 Palo Alto, CA 94301 Office: (650) 329-1330 or (800) 332-4313 Fax: (650) 329-9957 <a href="http://www.dworkininsurance.com">www.dworkininsurance.com</a> Offering Individual and Family Medical Insurance, Travel Medical, Medicare Supplements, Dental Plans, and Part D Prescription Drug Plans</p>	<p style="text-align: center;"><b>LEGACY WEALTH MANAGEMENT</b> Daniel R. Henderson, MBA, CFP 3478 Buskirk Avenue, Suite 300 Pleasant Hill, CA 94523 Office: (925) 296-2853 or (877) 679-9784 Fax: (925) 944-5675 E-mail: <a href="mailto:daniel@legacywealthmanagement.biz">daniel@legacywealthmanagement.biz</a> <a href="http://www.legacywealthmanagement.biz">www.legacywealthmanagement.biz</a> Offering discounted John Hancock Long Term Care Insurance and Life Insurance, Annuities, Retirement, Investment and Estate Planning, Mutual Funds, and 401K.</p>
<p style="text-align: center;"><b>DAVID WHITE &amp; ASSOCIATES</b> Wealth Accumulation and Preservation 3150 Crow Canyon Place, Suite 2000 San Ramon, CA 94583 (800) 548-2671 Contact: Ryan Gonzales (ext. 2682), <a href="mailto:rgonzales@dwassociates.com">rgonzales@dwassociates.com</a>, or Matt Kay (ext. 2628), <a href="mailto:mkey@dwassociates.com">mkey@dwassociates.com</a> Offering Investments, Retirement Plans, Education Savings Accounts, Medical Insurance, Life Insurance, Disability Insurance, and Long Term Care Insurance.</p>	
<b>CREDIT UNIONS</b>	
<p style="text-align: center;"><b>LA FINANCIAL FEDERAL CREDIT UNION</b> P.O. Box 6015 Pasadena, CA 91102-6015 (800) 894-1200 <a href="http://www.lafinancial.org">www.lafinancial.org</a> Open to anyone living, working or worshipping in Los Angeles County, or referral from existing member.</p>	<p style="text-align: center;"><b>PROVIDENT CREDIT UNION</b> 303 Twin Dolphin Drive P.O. Box 8007 Redwood City, CA 94603-0907 (800) 632-4699 - (650) 508-0300 <a href="http://www.providentcu.org">www.providentcu.org</a> All LSI members are eligible to join.</p>

#### **QUESTIONS AND CONCERNS CONTACT:**

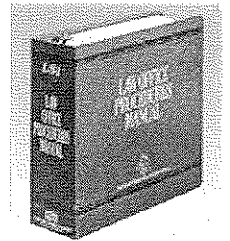
Sandra T. Jimenez, CCLS, LSI Vice President  
LSI® Marketing Committee Coordinator  
P.O. Box 58, Seeley, CA 92273  
Cell - (760) 604-3057  
[sjimenez52@yahoo.com](mailto:sjimenez52@yahoo.com)

# Legal Publications

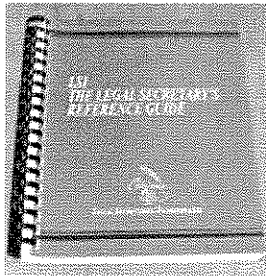


## LSI Legal Professional's Handbook and Law Office Procedures Manual

- The most clear, concise procedural handbook for California courts on the market! Cross-references to code sections and other legal publications.
- Twenty-four separation 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 at <http://www.ruttergroup.com/legalsec.htm>. Members of Legal Secretaries, Incorporated, receive a discounted rate for these publications.



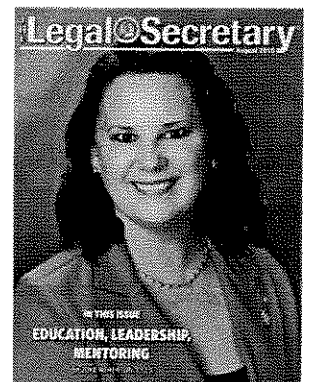
## Legal Secretary's Reference Guide



- A legal procedure guide designed to assist local associations in conducting a training class. Also useful for training office personnel and as a general reference for experienced staff.
- [http://www.lsi.org/reference\\_guide.php](http://www.lsi.org/reference_guide.php)

## The Legal Secretary

- Become a member of Legal Secretaries, Incorporated, and you will receive this informative quarterly magazine. The magazine contains educational and professional development articles submitted by LSI officers, chairmen, members and guest writers; a list of all officers and chairmen; notification of upcoming conferences, workshops, seminars, dates for upcoming California Certified Legal Secretary examinations and much, much more!





Imperial County Legal Professionals Association  
and  
San Diego Legal Secretaries Association

celebrate the 50s with

## HAPPY DAYS

Legal Secretaries, Incorporated's 78th Annual Conference



Bahia Resort Hotel  
998 W. Mission Bay Drive, San Diego, CA 92109



May 17-20, 2012



### CONFERENCE REGISTRATION FORM



NAME (AS IT WILL APPEAR ON BADGE): \_\_\_\_\_  
MAILING ADDRESS: \_\_\_\_\_  
CITY/STATE/ZIP: \_\_\_\_\_  
TELEPHONE: \_\_\_\_\_  
EMAIL ADDRESS: \_\_\_\_\_  
LOCAL ASSOCIATION (DO NOT ABBREVIATE): \_\_\_\_\_

PLEASE CHECK IF APPLICABLE (INCLUDE TITLE):

STATE OFFICER: \_\_\_\_\_  
STATE CHAIRMAN: \_\_\_\_\_  
☐ GOVERNOR      ☐ CCLS      ☐ PLS      ☐ DELEGATE      ☐ ALTERNATE DELEGATE

**SCRIP TICKET** (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET, AND BRUNCH):

	<u>BY CHECK</u>	<u>BY PAYPAL</u>	
POSTMARKED ON OR BEFORE APRIL 15, 2012	\$127.00	\$130.99	\$ _____
POSTMARKED ON OR AFTER APRIL 16, 2012	\$137.00	\$141.28	\$ _____

#### INDIVIDUAL TICKETS:

REGISTRATION ON OR BEFORE APRIL 15, 2012	___ @	\$20.00	\$20.88	\$ _____
REGISTRATION ON OR AFTER APRIL 16, 2012	___ @	\$30.00	\$31.17	\$ _____
GOVERNORS' LUNCHEON (FRIDAY)	___ @	\$25.00	\$26.03	\$ _____
PRESIDENTS' LUNCHEON (FRIDAY)	___ @	\$25.00	\$26.03	\$ _____
NEWCOMERS' LUNCHEON (FRIDAY)	___ @	\$25.00	\$26.03	\$ _____
WELCOME RECEPTION (FRIDAY)	___ @	\$25.00	\$26.03	\$ _____
CCLS LUNCHEON (SATURDAY)	___ @	\$27.00	\$28.09	\$ _____
BANQUET (SATURDAY)	___ @	\$60.00	\$62.04	\$ _____
___ PRIME RIB    ___ SALMON    ___ VEGETARIAN				
BRUNCH (SUNDAY)	___ @	\$28.00	\$29.12	\$ _____

**TOTAL AMOUNT PAID:** \$ \_\_\_\_\_

SPECIAL DIETARY REQUEST (INCLUDING VEGETARIAN): \_\_\_\_\_

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**SEND TO:**

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**TO PAY BY PAYPAL:**

**[WWW.SDLSA.ORG](http://WWW.SDLSA.ORG) (PAYMENT INCLUDES TRANSACTION FEE)**



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and  
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Legal Secretaries, Incorporated's 78th Annual Conference



Bahia Resort Hotel  
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May 17-20, 2012



### HOTEL REGISTRATION FORM



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Mailing address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Email Address: \_\_\_\_\_

Arrival Date: \_\_\_\_\_ Departure Date: \_\_\_\_\_  
Roommate(s): \_\_\_\_\_

#### Accommodations:

- ☐ Single/Double \$139.00 per night
  - ☐ Triple \$159.00 per night
  - ☐ Quad \$179.00 per night
  - ☐ Add'l Person \$20.00 per night
- Children 17 and under may stay in  
parents' room at no additional charge



**Reservations:** [https://shop.evanshotels.com/bahia\\_groups/lsi0516b12.html](https://shop.evanshotels.com/bahia_groups/lsi0516b12.html) or  
call the hotel at 858-488-0551

**DEADLINE TO RESERVE YOUR ROOM IS APRIL 16, 2012 – BOOK EARLY!**

**Check In:** 4:00 p.m.      **Check Out:** 12:00 p.m.

**Parking:** Complimentary

**Airport:** San Diego International Airport is 7 miles from the hotel.

**Transportation:** Cloud 9 Shuttle (\$12 each way); taxi (\$22-\$27 each way)

#### For additional information, contact:

Liz Adame, CCLS, Conference Co-Chair

(760) 460-1916  
[liz.adame@sbcglobal.net](mailto:liz.adame@sbcglobal.net)

Michelle D. Tice, CCLS, Conference Co-Chair

(619) 820-9525  
[michelle@danstanfordlaw.com](mailto:michelle@danstanfordlaw.com) and [mdtice@cox.net](mailto:mdtice@cox.net)  
(please send emails to both addresses)

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Mail to: **Cheryl L. Kent, PLS, CCLS, Legal Specialization Sections Coordinator**  
**5534 Blackbird Drive, Pleasanton, CA 94566**

Enclosed is payment of my dues for the fiscal year **8/1/11** through **7/31/12** for the following Section(s). Please check appropriate boxes below for the sections you are joining.

**Method of Payment:** Check, payable to "LSI," enclosed ☐ VISA ☐ MASTERCARD ☐ AMEX ☐

**Credit Card Information:** Number \_\_\_\_\_ **Expiration Date:** Month \_\_\_\_\_ Year \_\_\_\_\_

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NEW	RENEWAL
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<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

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



(PLEASE PRINT OR TYPE)

NAME: MR./MRS./MS. \_\_\_\_\_ PLS/CCLS/CLA/PARALEGAL

ADDRESS/CITY/STATE/ZIP \_\_\_\_\_

LOCAL ASSOCIATION: \_\_\_\_\_ LSA/LPA

RESIDENCE PHONE ( ) \_\_\_\_\_ BUSINESS PHONE: ( ) \_\_\_\_\_

E-MAIL ADDRESS(ES): \_\_\_\_\_

EMPLOYER: \_\_\_\_\_

EMPLOYER'S ADDRESS: \_\_\_\_\_

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SPECIALTY: \_\_\_\_\_

FAMILIAR WITH PRACTICE IN COUNTIES OF (Please indicate each County, not area):



# Superior Courts of California

## County of Riverside

### LAW AND MOTION INFORMATION

The Riverside County Superior Court has expanded their online Motion date reservation system to include the desert courts. Please see the link below for further details.

*"This system was developed for reserving general civil law and motion hearings with the exception of small claims and unlawful detainers.*

*There are no additional fees charged to use this motion hearing reservation system.*

*You will be charged the applicable motion filing fee at the time you reserve the motion hearing date. Once the motion hearing date is reserved, the fees are non-refundable.*

*All motions and related documents shall be filed with the clerk's office according to statute. Once this paperwork is filed with the court your reservation shall be confirmed.*

*All Motions in Limine shall be filed with the assigned trial department".*

<http://reservations.riverside.courts.ca.gov/LawAndMotionInformationPage.pdf>

Currently, you may reserve civil motion hearings at the following locations:

**Western:** (Historic Courthouse: 1, 2, 3, 4, 5, 6, 7, 10,12)

**Mid Century:** (Banning: B1; Hemet H1; Temecula T1)

**Desert:** (Blyth B1; Indio 2F, 2G, 2H)

### CHANGES IN THEIR LOCAL RULES

Please see the attached notice from the Riverside County Superior Court in regards to changes in their local rules. See Page 15.

<http://www.riverside.courts.ca.gov/localrules/localrules.shtml>

### ON-LINE COPY REQUESTS NOW AVAILABLE

Effective January 17, 2012, the Riverside County Superior Court is launching its automated on-line system for requesting copies of documents filed in family law, probate and civil cases.

Through this on-line system you will be able to request certified copies of imaged civil documents and copies or certified copies of imaged family law and probate documents that are open to public inspection. You will also be able to request certified minute orders for family law, probate and civil cases. It is estimated that copies of imaged criminal documents will be available in February 2012. Copy fees, including postage, will be assessed. The court accepts Visa, MasterCard, Discover, and American Express as forms of payment. Copy requests will be processed within five business days.

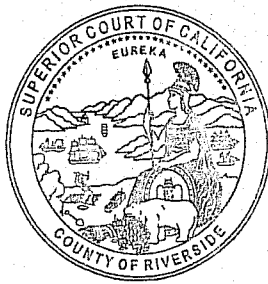
This convenient service is available 24 hours a day, seven days a week.

[http://www.riverside.courts.ca.gov/notice\\_on\\_line\\_copy\\_request.pdf](http://www.riverside.courts.ca.gov/notice_on_line_copy_request.pdf)

### NEW COURT FORMS FOR SUPERIOR COURT (as of Jan. 1, 2012)

WG-001*	Application for Earnings Withholding Order
WG-035*	Confidential Statement Of Judgment Debtor's Social Security Number
WG-012	Notice of Termination or Modification of Earnings Withholding Order
WG-004	Earnings Withholding Order For Support (Wage Garnishment)
WG-002*	Earnings Withholding Order (Wage Garnishment)
WG-030*	Earnings Withholding Order for Elder and Dependent Adult Abuse
WG-005*	Employer's Return
WG-003	Employee Instructions (Wage Garnishment)
WG-009	Notice of Opposition to Claim of Exemption
CIV-120*	Notice of Entry of Dismissal and Proof of Service
EJ-130	Writ of Execution

Please visit their Website  
<http://www.riverside.courts.ca.gov/localfrms/localfrms.shtml>



## Superior Court of California County of Riverside

### PUBLIC NOTICE

Effective January 1, 2012, the Riverside Superior Courts local rules will be reorganized so that the titles correspond to those found in the California Rules of Court. Furthermore, the numbering system for rules is changing to a simpler four-digit system and the use of decimals will be eliminated. The family law local rules will now be found under Title 5, Division 1. A rule conversion table (*showing old numbers to new rule numbers*) is below for your reference.

In addition, the table also reflects the new, amended and repealed rules as of January 1, 2012.

Title 5 - Civil - Family Law	Title 5 - Family and Juvenile Rules	Title of Rule	New, Amended or Repealed Rule as of January 1, 2012
	<b>Division 1 - Family Rules</b>		
New	5101	Where to File Documents	<i>NEW</i>
5.0005	5105	Facsimile Transmission Filings	<i>AMENDED</i>
5.0010	5110	Request for Order Procedure	<i>AMENDED</i>
<del>5.0020</del>	<del>5120</del>	<del>OSC/Motion—Service</del>	<i>REPEALED</i>
5.0025	5125	Request for Order - Continuance	<i>AMENDED</i>
<del>5.0040</del>	<del>5140</del>	<del>Temporary Restraining Orders—Domestic Violence</del>	<i>REPEALED</i>
5.0041	5141	Requests to Dismiss Restraining Orders	<i>AMENDED</i>
5.0050	5150	Family Law Mandatory Settlement Conferences and Trials	
5.0053	5153	Trial Rules and Procedures	
5.0055	5155	Mediation of Custody and Visitation	
5.0056	5156	Peremptory Challenge of a Mediator	
5.0060	5160	Appearance by Telephone for Family Law Matters	
5.0065	5165	Ex Parte Procedures in Family Law Matters	
5.0066	5166	Set-Aside Default to Allow the Filing of an Amended Petition	
5.0070	5170	Mandatory Settlement Conferences	
5.0075	5175	Court Ordered Child Custody Evaluations	
5.0080	5180	Formal Judgment and Addenda to Judgment	





# NEWS RELEASE

SUPERIOR COURT OF CALIFORNIA • COUNTY OF SAN DIEGO  
Post Office Box 120128 • San Diego, CA 92112-0128

Release: Immediately  
Date: 2/29/12

Contact: Karen Dalton  
Phone: (619) 450-5353

## San Diego Superior Court Expands Imaging Project to Probate

The Superior Court of California, County of San Diego, is now scanning newly-initiated Probate cases in its Central and North County Divisions. In addition, all papers in cases that were initiated by filing in the Central and North County Probate Divisions on or after January 4, 2010 through February 29, 2012 and which remain active, will be imaged and stored in an electronic court file. The scanned/imaged documents will be available via computer for viewing by judges, court staff, and parties involved.

Public documents related to the cases will also be available on-line to any interested party. Those documents can be viewed free of charge on courthouse kiosks or, for a fee, can be viewed and printed off-site via the court's website, [sdcourt.ca.gov](http://sdcourt.ca.gov).

The following Central and North County Division Departments will begin using imaged documents effective March 1, 2012:

### Central Division

Dept. PC-1 – Judge Jeffrey S. Bostwick

Dept. PC-2 – Judge Julia C. Kelety

(MORE)

**North County Division**

Dept. N-02 – Judge Richard G. Cline

Documents from cases initiated on and after March 1, 2012 will be retained in paper form for 90 days. All papers in cases that were initiated by filing in the Central and North County Probate Divisions on or after January 4, 2010 through February 29, 2012 and which remain active, will be imaged and stored in an electronic court file, at which time the electronic court file will be certified as the official court file. The parties in these cases will receive notice and instructions about how the documents from the physical court file will be handled.

“The court’s imaging project for probate will enhance our ability to provide quality, cost saving and convenient service to the public. The conversion to electronic files will eliminate the need to store old paper files and the attendant costs of that storage. This saves the taxpayer money. The quality of the electronic files is excellent. The use of electronic files will make file review more convenient to the public by providing remote access to the court files throughout the County of San Diego. This project is a win-win for the court and the public,” says Probate Judge Jeffrey S. Bostwick.

The court wide imaging project began in the court’s downtown courthouse (Central Division) in August of 2011 and is expanding to other divisions during 2012.

# # #

# Superior Courts of California County of Ventura

## ***NOTICE OF CHANGE IN BUSINESS HOURS***

### **EFFECTIVE JANUARY 3, 2012**

Effective January 3, 2012, the clerk's offices will be closing at 3:00pm with the exception of jury services and collections.

Phone hours in the clerk's offices will be from 8:00 am - 11:30 am, and 1:30 pm - 3:00 pm.

Drop boxes are provided outside of the clerk's offices at all court locations, and documents placed in the boxes by 5:00 pm will be deemed deposited for filing that same business day.

---

## ***REASSIGNMENT OF EAST COUNTY CIVIL LAW JUDGES AND CLERK'S OPERATIONS TO THE HALL OF JUSTICE IN VENTURA***

### **EFFECTIVE JANUARY 30, 2012**

Pursuant to Government Code §68106 and California Rules of Court, rule 10.620, the Superior Court of California, County of Ventura, is providing 60 day notice of the decision of the Presiding Judge to reassign its two East County Civil Law Judges (Courtrooms S3 and S5) and all related civil clerk's office operations at that Simi Valley location, except unlawful detainees, family law and small claims to its main courthouse located at the Hall of Justice, 800 South Victoria Avenue, Ventura, California on January 30, 2012.

This change is necessary due to the significant reduction in funding for the California court system. The Ventura Superior Court is facing a \$5.8 million dollar deficit for this fiscal year that began July 1, 2011, and is projected to increase to \$11.8 million for next fiscal year beginning July 1, 2012.

Court employees currently working at the East County Courthouse civil clerk's office are responsible for processing all civil, family and small claims matters filed at that location. Due to hiring freezes, mandatory furloughs and layoffs, staffing at the East County Courthouse has been so reduced that the clerk's office is unable to process the work in all these areas in a timely manner.

After January 30, 2012, the East County Courthouse will continue to hear and accept filings for Family Law, Small Claims, Unlawful Detainer, and Traffic matters. Parties may continue to submit general civil documents at the East County Courthouse. However, the documents will be "Received" Stamped and transported to the Hall of Justice in Ventura for processing and filing.

The court invited public comment pursuant to rule 10.620(d)(3). The court received fourteen comments from the public. Ten opposed relocation based upon the additional cost and inconvenience of being required to conduct court business at the Hall of Justice. Four supported relocation to assist with the current budget crisis. The Court recognizes and regrets that this decision will greatly inconvenience Ventura County residents. However, due to inadequate state funding, the Court cannot maintain the current level of services. Moving the civil courtrooms will allow for greater efficiencies by processing all general civil cases in one court location.

*The above information has been provided by the Ventura County Superior Court*  
[www.ventura.courts.ca.gov](http://www.ventura.courts.ca.gov)

## Superior Courts of California County of Orange

Orange County Local Rule 700.6 is effective January 1, 2012.

### 700.6 Family Law Filings

All papers submitted for filing within a family law case that are not on a Judicial Council form or court approved local form must use the Document Cover Sheet (Family Law), Form L-0771, as the first page. The form may be downloaded from the court's website at

<http://www.occourts.org/forms/local/1771.pdf>

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CSR No. 6874

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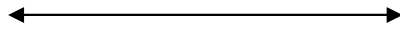
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# FROM THE PARLIAMENTARIAN

*Taken from Parliamentary Procedure by Dr. John A. Cagle  
Parliamentarian of the Academic Senate and Professor of  
Communication at California State University, Fresno*

## BASIC PRINCIPLES:

1. Parliamentary procedure exists to facilitate the transaction of business and to promote cooperation and harmony.
2. All members have equal rights, privileges, and obligations.
3. A quorum must be present for the group to act.
4. Full and free discussion of every motion considered is a basic right.
5. Only one question at a time can be considered at any given time.
6. Members have the right to know at all times what the immediately pending question is, and to have it restated before a vote is taken.
7. No member can speak until recognized by the chair.
8. No one can speak a second time on the same question as long as another wants to speak a first time.
9. The chair should be strictly impartial.



## HANDLING A MOTION:

### Three steps by which a motion is brought before a group.

1. A member makes a motion.
2. Another member seconds the motion.
3. The chair states the question on the motion.

### Three steps in the consideration of a motion.

1. The members debate the motion (unless no. member claims the floor for that purpose).
2. The chair puts the question to a vote.

- A. The chair restates the question:
- B. The chair takes the vote:

“All in favor of the motion, say aye.”  
“Those opposed, say no.”

3. The chair announces the result of a vote. A complete announcement should include:
  - A. Report on the voting itself, stating which side prevailed (and giving the count if a count prevailed).
  - B. Declaration that the motion is adopted or lost.
  - C. Statement indicating the effect of the vote or orderings its execution.
  - D. Where applicable, announcement of the next item of business or stating the question of the next motion that consequently comes up for a vote.



## VOTING:

### Basic Methods of Voting

**Voice Vote.** A vote by voice is the regular method of voting on any question that does not require more than a majority vote for its adoption.

**Rising Vote.** Used principally when a voice vote has produced an inconclusive result and as the normal method of voting on motions requiring a two-thirds vote, members indicate their vote by standing.

**Show of Hands.** As an alternative to the voice vote or as a way to verify an inconclusive result, members show their vote by raising their hand. A vote by show of hand should be limited to very small meetings.