



# Hearsay



*Through Example, We Lift Others*

## San Francisco Legal Professionals Association



PO Box 193054,  
San Francisco, California 94119-3054  
www.SFLPA.org



*In This Issue...*

**Feature: San Francisco Housing**

**Feature: How Irish Immigrants Shaped American Halloween**

**What Have We Been Up To? Recent Events**

## Happy Fall Y'all!

By Jessica Landers, Editor

It might be hard to tell with the warm Bay Area weather, but we're welcoming you to fall in this issue of the *Hearsay*. I hope you're leaning into the season, whether that means pumpkin spice lattes (iced), gazing longingly at your chunky sweaters and fall boots, or a great spooky book.\* I've received a warm autumnal welcome to the *Hearsay* team for my first issue, and extend one to you as well.

Keeping with our autumnal theme, Francie has an article about the origins of Jack O'Lanterns and how Irish immigrants shaped how Americans celebrate Halloween. And Miles H. Imwalle, Esq., Daniel Gershwin, Esq., and Stephanie Straka, Esq. of Coblenz Patch Duffy & Bass LLP share with us an important article on changes to housing policy in San Francisco.

As always, we also have legal updates – from our Legal Procedure Chair Danya Gonzales – plenty of photos from events and members, and ways for you to get involved. Thanks for reading!

\*I recommend *We Have Always Lived in the Castle* by Shirley Jackson.

# San Francisco Legal Professionals Association 2024-2025 Elected Officers



Frances Skaggs, CCLS  
President



Suddie Scott  
Vice President



Katia Tsvetkova  
Secretary



Sally Mendez  
Treasurer



Lorri Nicolini, CCLS  
Governor

## Appointed Officers, Chairs & Committee Members

Executive Advisor: May Sene - [executiveadvisor@sflpa.org](mailto:executiveadvisor@sflpa.org)

Parliamentarian: Sally Mendez - [sflegalsecretary@gmail.com](mailto:sflegalsecretary@gmail.com)

Career Promotion and Scholarship: Jameelah R. Hoskins - [careerscholarship@sflpa.org](mailto:careerscholarship@sflpa.org)

CCLS Program: Lorri Nicolini, CCLS - [ccls@sflpa.org](mailto:ccls@sflpa.org)

Education: Claudia Deza, Chair - [education@sflpa.org](mailto:education@sflpa.org)

Hearsay Committee: Jessica Landers, Chair, Francie Skaggs & Danya Gonzales - [editor@sflpa.org](mailto:editor@sflpa.org)

Legal Procedure: Danya Gonzales, Chair - [legalprocedure@sflpa.org](mailto:legalprocedure@sflpa.org)

Membership: Suddie Scott, Chair - [membership@sflpa.org](mailto:membership@sflpa.org)

Professional Liaison/Day-in-Court: OPEN - [dayincourt@sflpa.org](mailto:dayincourt@sflpa.org)

Programs: Mike Lewis - [program@sflpa.org](mailto:program@sflpa.org)

Ways & Means: Lillian Wong - [waysandmeans@sflpa.org](mailto:waysandmeans@sflpa.org)

Website: Kristen Craig-Reed, Chair - [website@sflpa.org](mailto:website@sflpa.org)

Employment: Kristen Craig-Reed, Chair - [employment@sflpa.org](mailto:employment@sflpa.org)

Social Media and DEI: OPEN

Open Positions:

Hearsay Graphics Designer, Day in Court, Social Media



Group Photo of SFLPA Members and Guests

# We Value our Members!



# TABLE OF CONTENTS

VOLUME 89 - ISSUE 2

AUGUST - OCTOBER 2024

Cover Article, Jessica Landers.....	1
Elected and Appointed Officers and Committee Members 2024-25 .....	2
Table of Contents .....	3
President's Message, Francie Skaggs, CCLS .....	4-5
Vice President's Message & Report, Suddie Scott .....	6
Governor's Report, Lorri Nicolini, CCLS .....	7-9
Meet SFLPA's New Hearsay Committee .....	10
LPI Membership .....	11
A Lunch to Honor Rod Cardinale, Jr., Christine J. Flores, CBA .....	12
SFLPA Recent Events Photos .....	13-14
Feature: How Irish Immigrants Shaped the American Halloween, Francie Skaggs, CCLS .....	17-20
SFLPA Out and About Photos .....	21-24
Feature: How Legislative Bills are Addressing the Housing Crises in California, Francie Skaggs, CCLS .....	27
Feature: As San Francisco Fails to Meet its Housing Goals, the City's Approval Process for Housing Projects Just Got Much (Much) Faster and Easier, Miles H. Imwalle, Esq., Daniel Gershwin, Esq., and Stephanie Straka, Esq. ....	28-29
CCLS Application .....	31
Legal Procedure: California Court Chatter, Danya Gonzales .....	32-38
Just a Few LPI Events .....	40
SFLPA Membership Information .....	42
LPI Benefits .....	43
SFLPA & LPI Events Calendar .....	44
SFLPA Change of Address Form .....	45
SFLPA Diversity, Equity + Inclusion Statement .....	46
Diversity, Equity and Inclusion Calendars, Odaya Buta-Scott .....	47-49
Message from <i>Hearsay</i> Editor, Jessica Landers .....	51
LPI Code of Ethics .....	52



# PRESIDENT'S MESSAGE

FRANCIE SKAGGS, CCLS



## Through Example, We Lift Others

Greetings Members,

First of all, I would like to welcome all the newly-initiated members into San Francisco Legal Professionals Association. We had a wonderful Membership Happy Hour on August 22, 2024, where I was able to meet so many of our newer members, and catch up with many long-time SFLPA members. It was nice to see many of you from the Hersh Family Law Practice and Johnston, Kinney & Zulaica LLP. I am looking forward to meeting more of our new members in the upcoming year.

LPI Career Promotions / Professional Liaison Leanne Ruesink has been visiting law firms all over California, informing office administrators and legal professional staff of all the benefits that LPI and its local associations, such as SFLPA, have to offer to help each of you in your career.

Please always feel free to reach out to myself at [president@sflpa.org](mailto:president@sflpa.org) or our Education Chair, Claudia Deza, at [education@sflpa.org](mailto:education@sflpa.org) to let us know if there is a topic of interest on which you would like us to find a presenter for a particular legal subject. Now that we have more members who practice in family law, we are working on providing more Brown Bag webinars focusing on family law.

I just attended LPI's Second Quarterly Conference in Costa Mesa. The conference had some interesting educational seminars on hot innovative areas of law that we may not think about. I attended a seminar on the legal aspects of Egg Donation and Surrogacy as well as Bitcoin, about which I knew nothing. The next LPI Conference will be in November and closer to home at the Embassy Suites in Walnut Creek. Please keep a look out for the flyer and classes that will be offered for this conference. Remember that you can always attend the classes virtually as well. Read more about the Second Quarterly Conference in the Governor's article in this issue.





# PRESIDENT'S MESSAGE CONT'D.



When polling its members, LPI recently discovered that the most important aspect of the organization is its continuing education. Both LPI and SFLPA provide this to our members so that you will know the most recent updates and information in the legal field, and in technology, add value to anyone in the business and to your employer and team.

The next conference will be here in the Bay Area at the Embassy Suites in Walnut Creek. Since it's right in our backyard, I cannot encourage you enough to attend this LPI conference. It's an experience to remember!

Our next Membership Meeting will be on Tuesday, October 15, at O'Hagan Meyer at One Embarcadero Center, Suite 2100, San Francisco. We will have Special Guest Speaker Aaron Hayes, Esq., who will present on "The Life Cycle of an Employment Case." We will also have our Holiday Party in December, so look out for upcoming information about this holiday festivity. I hope to see many of you at these upcoming events! Please always come and say hello to any of our fabulous Board Officers and Chairs.

Your President,

Francie Skaggs, CCLS

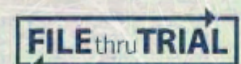


## FIRSTLEGAL

www.firstlegal.com | 415.626.3111

SENIOR ACCOUNT EXECUTIVE  
SUE HAMMER  
shammer@firstlegal.com  
415.720.6229

Court & Process  
Depositions  
Discovery  
Records  
Digital  
Investigations



© 2019 FIRSTLEGAL. ALL RIGHTS RESERVED. BY PERMISSION OF FIRSTLEGAL



# VICE PRESIDENT'S MESSAGE

## SUDDIE SCOTT



Dear Members and SFLPA Community:

San Francisco Legal Professionals Association hosted its annual Membership Happy Hour at the Patriot House in San Francisco on August 22, 2024. In attendance were 33 members, guests and vendors who enjoyed a memorable evening. We invited seven new members to receive their certificates. I initiated the following members: Camelia Cala, Tatiana Canas, Naomi Chang, Beth Davis, Olivia Giannini, and Russell Guevarra. There were four new people that filled out membership applications. We had an opportunity drawing and several people won gifts. The vendors that helped us with our gifts, appetizers, beer and wine were: Consilio, First Legal, Veritex, Law Offices of Bresler & Lee, U.S. Legal, ASAP, and our very own Mike Lewis. Thank you all so very much for your continued support!

We are still recruiting new members to join SFLPA. We have several upcoming webinars and a Giant's game on September 28th at Oracle Park in San Francisco.

We currently have 78 members and counting. We are looking forward to a great year.

Suddie Scott  
Vice President



**Pathways**  
Personnel

Our Offices

San Francisco  
Silicon Valley  
New York City

[pathwayspersonnel.com](http://pathwayspersonnel.com)





# GOVERNOR'S REPORT

## LORRI NICOLINI, CCLS



### LPI First Quarterly Conference

The First Quarterly Conference and Board of Governors Meeting was held on August 16-18, 2023 at the Hilton Orange County/Costa Mesa in Costa Mesa, California. It was hosted by Legal Professionals, Incorporated. I attended as Governor, and Francie Skaggs, CCLS and Christine Flores, CBA attended in their capacities as part of the LPI Leadership Team. Our own Larry McGrew attended in his capacity as LPI Treasurer – his first Quarterly Conference in that role.

The theme of the Conference was “Under the Sea.” It began on Friday, August 16th, with an informal welcome reception and a craft event and nacho bar hosted by Esquire Deposition Services. Participants enjoyed a relaxed evening of socializing and creating colorful beaded bracelets in keeping with the “Under the Sea” theme.

Saturday morning dawned with a buffet breakfast and Board of Governors Meeting. Rod Cardinale, Jr., Executive Advisor, presided over the meeting. There were 14 Governors present constituting a quorum. The Minutes of the May 2024 90th Annual Board of Governors Meeting were distributed and approved as corrected.

The LPI Elected Officers gave their reports. Of note were reports of an increase in LPI membership. As of July 31, 2024, LPI has 515 renewing members, 106 new members, seven student members, six associate members, 31 reverse PC members, 16 lifetime members, and 65 members at large (“MALs”), for a total of 746 members across 23 Associations. This is a 23% increase over membership on July 31, 2023. As of July 31, 2024, SFLPA had 61 members, including one student member and four lifetime members; the total membership to date is 88. Sadly, two Associations are in the process of dissolving because of lack of membership. They are Merced County LPA and San Fernando Valley LSA.

Highlights of the Treasurer’s report included a robust income of \$118,968.00 for the first quarter (May through July 2024) consisting of income from membership dues, classes, royalties from LPI publications, advertising in the Legal Professionals Magazine, and donations, among other things.



LPI Treasurer  
Larry McGrew and  
SFLPA President  
Francie Skaggs, CCLS

*IN ALL  
Things  
GIVE  
Thanks*



# GOVERNOR'S REPORT

## LORRI NICOLINI, CCLS



Thirteen people signed up for the latest CCLS study group, and 19 people signed up for the September 2024 CCLS exam. Lynne Prescott, CCLS and Vivian Shreve, CCLS are working on a nationwide Legal Secretaries Guide. No publication date has been announced.

The next few LPI Conferences are scheduled to be held as follows:

- November 14-17, 2024 – 2nd Quarterly Conference in Walnut Creek
- February 21-23, 2025 – 3rd Quarterly Conference in Santa Cruz
- May 15-18, 2025 – 91st Annual Conference in El Cajon

After a Roundtable Lunch in the main hall, a number of MCLE classes on interesting topics were offered throughout Saturday afternoon including “Preparing for Federal Court Trials”; “Preparing for State Court Trials”; “I Saw It on the Internet, So It Must Be True”; “Surrogacy and Egg Donation”; “BitCoin, Block Chain, Cryptocurrencies and the Law”; and “Professional Ethics.”

Several vendors displayed their offerings throughout the Conference. LPI gets a great deal of support from the vendors who support us through memberships, donations, sponsorships, and drawings. It was also a chance for Conference attendees to acquaint themselves with the many vendors who help us do our jobs so efficiently. LPI also had its usual raffle drawings made possible by donations from the various Associations, and this year an additional silent auction was held with various gifts and services donated by individual LPI members. Opportunities abounded and many Conference attendees took home one or more of the items offered.

The Saturday evening reception and banquet continued the “Under the Sea” theme with good food, socializing, and fun times all around.

Right: Vice President Bettina Jacobson, Executive Secretary Erika Garduño & Treasurer Larry McGrew

Far Right: Freda Bell, Linda Lane, CCLS, Sandra Holley, Lorri Nicolini, CCLS, Lynne Prescott, CCLS, Donna Day, & Christine Flores, CBA







# GOVERNOR'S REPORT

## LORRI NICOLINI, CCLS



Sunday morning dawned with a lovely buffet breakfast and inspirational speaker before the second session of the Board of Governors Meeting convened. There were 13 Governors present, constituting a quorum. Of note were several changes to the LPI Bylaws and Standing Rules. It was voted to increase the per-capita fees by \$20 per member (from \$40 to \$60) beginning on May 1, 2025. Dues and fees for MALs were adjusted to be in line with that per-capita increase. There were some increases to fees for the CCLS examination and renewals, as there have not been any increases to CCLS fees since 2012. Sadly for SFLPA, the Chapter Achievement Contest was canceled, and a committee has been formed to explore other ways of encouraging the chapters to actively participate in all of the LPI activities and offerings. SFLPA had been one of only a handful of Associations who actively participated in the Chapter Achievement Points Contest. LPI would like to make future contests more inclusive of all the Associations.

A drawing was held for scrip tickets to the 2nd Quarterly Conference to be held in November 2024 in Walnut Creek. The winning associations were San Gabriel Valley LSA, Desert Palm LPA, Riverside LPA, and Stockton-San Joaquin County LPA.

It was a pleasure and a privilege to represent the San Francisco Legal Professionals Association at LPI's 1st Quarterly Conference as your Governor. Please feel free to contact me if you have any questions or comments about this Conference. Complete copies of the Officers and Chair reports are available on the LPI website.



**Leanne Ruesink, Lorri Nicolini CCLS, Sandra Holley, Renee Evans, CCLS, Bethany Ensz & Christine Flores, CBA enjoying the brunch**

**LPI President Donna Day addresses the Board of Governors**



# MEET SFLPA'S NEW HEARSAY COMMITTEE

## GRAPHICS DESIGNER PRO TEM

**FRANCIE SKAGGS, CCLS**

Joined 2012  
Sr. Litigation Legal Secretary  
Coblentz Patch Duffy & Bass LLP



## EDITOR

**JESSICA LANDERS**

Joined 2021  
Litigation Legal Assistant  
Benesch, Friedlander,  
Coplan & Aronoff, LLP



## COPY EDITOR & LEGAL PROCEDURE CHAIR

**DANYA GONZALES**

Joined 2021  
Sr. Litigation Paralegal  
Keker, Van Nest & Peters LLP





# LPI

Educating California's  
Legal Support Professionals

## MEMBERSHIP

Established in 1934, Legal Professionals Inc., also known as “LPI,” is a nonprofit, mutual benefit corporation organized for the purposes of providing educational, professional, and personal development programs to its members.

Membership is open to anyone within the legal profession. In addition to legal support professionals, the membership includes court clerks, court reporters, paralegals, legal assistants, legal administrators, banking/trust department personnel, legal support vendors, and attorneys.

Local associations, located throughout the state, offer monthly educational and professional programs. Many sponsor lunchtime learning, evening, and weekend long-term educational workshops.

### Advantages of LPI Membership:

- Continuing education and professional development
- Local association educational meetings
- Networking with other legal professionals
- *The Legal Secretary* magazine (published quarterly)
- Benefits available to members on an individual basis:
  - Discounts on LPI’s Rutter Group publications
  - Financial consulting
  - Disability income plan
  - Long-term care plan
  - Medical plan
  - Credit union memberships
  - Rental car discounts

### LPI Conferences:

Conferences are held May, August, November, and February at various locations throughout California. Continuing educational seminars and workshops are offered at each conference, conducted by respected attorneys, judges, and educators. Updated materials are provided for each workshop.

### Membership-At-Large:

There are over thirty associations within the State of California. Legal professionals may join LPI as a Member-at-Large if a local association is not within a reasonable distance. Members-at-Large are eligible for all of the benefits of membership, but joining LPI through a local association provides instant access to the benefits of the local association as well as LPI.

### LPI Publications:

*Legal Professional’s Handbook* – This best-selling, two-volume publication sets out procedures and forms in most areas of law in a clear, concise manner.

*Law Office Procedures Manual* – This publication, an excellent training tool, contains completed Judicial Council forms, procedural guidelines and a glossary formulated for legal procedure.

*Legal Secretary’s Reference Guide* – The essential, handy desk reference guide for busy legal professionals.

*The Legal Secretary* – This quarterly magazine, published by LPI and distributed to all members, contains educational and professional development articles from LPI officers, chairmen, members, and guests.

### LPI Programs:

California Certified Legal Secretary – Become more valuable in your office, maintain and increase your skills, gain more confidence, earn more respect, and achieve greater financial security by achieving certification through the CCLS program. Online study courses are offered.

Legal Specialization Sections – Further your legal education by joining one or all of the Legal Specialization Sections: Civil Litigation, Criminal/Family Law, Law Office Administration, Probate/Estate Planning, Federal Law, and Specialty Law. Classes are offered free to members at each LPI conference, as well as online. Members receive a statewide roster of counterparts and quarterly newsletters.

Legal Secretary Training – Online classes are offered, including Beginning Legal Secretary and Advanced Discovery. Classes are work-at-your-own-pace, and are designed for legal staff at all levels.

**For more information about membership or an association near you, contact LPI’s Corporate Office: Kim Oreno, [kim@legalprofessionalsinc.org](mailto:kim@legalprofessionalsinc.org); [www.legalprofessionalsinc.org](http://www.legalprofessionalsinc.org). Find us on Facebook, Instagram, LinkedIn & Twitter!**

Take a step in the right direction. Advance your legal career, improve your professional and personal skills.  
**BECOME A MEMBER OF LPI TODAY.**



# A LUNCHEON TO HONOR ROD CARDINALE, JR.

## Christine J. Flores, CBA



When I think about Santa Clara County LPA (“SCCoLPA”), I immediately think of their *esprit de corps*! I’m not sure that any other local association’s members support each other, encourage each other or stick together the way the members of SCCoLPA do. As immediate past LPI President Rod Cardinale, Jr. firmly believes, we are stronger together! This spirit was clearly demonstrated on August 3, 2024 when SCCoLPA honored Rod, and recognized his achievements as LPI President from 2022 – 2024 at a luncheon.

Danya Gonzales and I represented SFLPA by attending this luncheon, and we had a fabulous afternoon! The event was held at Palermo Italian Restaurant in San Jose, a fine example of Italian cuisine and hospitality. We were greeted as we began to cross the street from the parking lot by a host who, equipped with a red stop sign, made sure the traffic stopped so the restaurant’s guests could cross the street safely. My mind immediately flashed back to my days as a student traffic patrol crossing guard in the fifth grade. We were greeted warmly by a hostess who walked us to the covered patio area where Rod and several SCCoLPA members were already gathering. It was a beautiful afternoon, perfect for enjoying a delicious Italian meal al fresco!



NOT ALL  
HEROES  
WEAR  
CAPES

While we were enjoying our tiramisu dessert, many members took the opportunity to acknowledge Rod for his contributions to LPI as well as to SCCoLPA. It is quite obvious to anyone who knows Rod Cardinale, Jr. that he will continue to play a vital role both in LPI and to his local association.

### SCCoLPA Crew



(Left) Heather Nowak, Rod Cardinale, Jr. & Elise Dresser, CCLS; (right) Elena Schneider, CCLS



# WHAT HAVE WE BEEN UP TO?

## RECENT EVENTS



SFLPA July 16, 2024 Membership Meeting & August 22, 2024 Happy Hour



Happy July birthdays to President Francie Skaggs, CCLS and Ways & Means Chair Lillian Wong



(Front) Scholarship Chair Jameelah Hoskins, (left) Brandilynn Thomas, Jennifer Murov & Rebecca Moreno are initiated as new members by VP Suddie Scott; (far left) President Francie Skaggs, CCLS, and (far right) Danya Gonzales welcome our new members



Guest speaker extraordinaire Pamela Duffy, Esq. receives a special gift from Programs Chair Mike Lewis



Camelia Cala



Beth Davis



Never stop learning, **KNOWLEDGE** is strength

Newly initiated members at the SFLPA Happy Hour, (left to right) Tatiana Canas, Russell Guevarra, Olivia Giannini & Naomi Chang



# WHAT HAVE WE BEEN UP TO?

## RECENT EVENTS



### SFLPA August 22, 2024 Happy Hour (Cont.)



Michael Garlie, CEDS, Denise Dodson & Paul Wright



(Above) Betty Hsu; (right) Tatiana Canas, Olivia Giannini, Christine Flores & Youlonda Wayne



Brandi Thomas & Beth Davis



Welcoming members Hearsay Copy Editor Danya Gonzales & Odaya Buta-Scott



(Left) Newly initiated members Camelia Cala, Beth Davis, Tatiana Canas, Naomi Chang, Olivia Giannini & Russell Guevarra; President Francie Skaggs & VP Suddie Scott give them a hearty reception



VP Suddie Scott, Ways & Means Chair Lillian Wong & Marika Pickles



(Left) Linda Covington, Julia Buteo, Suddie Scott, Brandi Thomas, Beth Davis, Lorri Nicolini, Paul Wright, Marika Pickles & Brook Braunschweig



(Left) Jessica Riley, VP Suddie Scott, Betty Hsu & Rebecca Moreno



Hersh FamilyLaw Practice attendees: (left) Russell Guevarra, Kasey Howell, Paige Garcia, Robert Rathmell, Naomi Chang & Camelia Cala

# Thank You

**SFLPA would like to thank all the vendors and those who donated to make our Membership Happy Hour a success!**

**ASAP LEGAL**

**VERITEXT**  
LEGAL SOLUTIONS

**Consilio**

**U.S. Legal Support**

**Special Acknowledgment**  
SFLPA Past President Faye Lee, Esq.  
SFLPA Programs Chair Mike Lewis



# EXPRESSNETWORK

A LEGAL SUPPORT NETWORK COMPANY

## FULL LEGAL SUPPORT SERVICE

### ATTORNEY SERVICES

- Service of Process
- e-File
- e-Recording
- Court Services
- Records Retrieval
- Digital Imaging
- Messenger
- e-Notary Services
- ProBono



*Claudia Deza*

Harvesting Knowledge as Education  
Chair for the SFLPA

### DEPOSITION SERVICES

- Court Reporting
- Trial Technology & Graphics
- Exhibit Management
- Legal Videography
- Interpreting & Translations
- Document Repository
- Real-time Reporting

**CONTACT US TO LEARN MORE ABOUT OUR  
LITIGATION SUPPORT SERVICES**

[claudiad@expressnetwork.com](mailto:claudiad@expressnetwork.com)

Direct: 415.531.4620



# HOW IRISH IMMIGRANTS SHAPED THE AMERICAN

# HALLOWEEN

BY FRANCIE SKAGGS, CCLS

DEI  
ARTICLE



Though we celebrate Irish Heritage in March here in the United States, October would have been a suitable month as well, since October is full of festivities and customs brought to our country by the Irish immigrants.



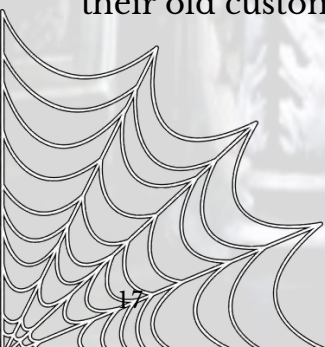
Millions of Irish citizens immigrated here in the later part of the 19th Century. They brought with them customs never before practiced here in the “New World” nor part of the American culture. Halloween as we know it today was originally introduced to us by the Irish immigrants. Many of our Halloween activities that we celebrate today were introduced to our country by the Irish.

## OCTOBER 31

November 1 was the first day of the Irish-Celtic New Year. The ancient Celts celebrated the festival of Samhain, from October 31 to November 1. The night before Samhain was known as “All Hallows Eve” (later to become “Halloween”), which was followed by “All Hallows Day” on November 1. Many historians have traced the origins of the word “Samhain” back to the Ancient Gaelic language meaning “Summer’s End.” The Celts believed that this was a magical time when the realm between Earth and what they called the “Other World” was thin and many spirits, ghosts and fairies walked the earth.



During the Irish conversion to Catholicism, many of the Celtic customs were folded into Christianity, which made the transition much easier for them to convert since they were able to continue with their traditional festivals celebrated by their long-standing belief system. In the eighth century, Pope Gregory III recognized November 1 as “All Saints Day” to honor all the saints and to remember our loved ones who had passed away before us. This allowed the Irish to practice Catholicism while still maintaining many of their old customs.

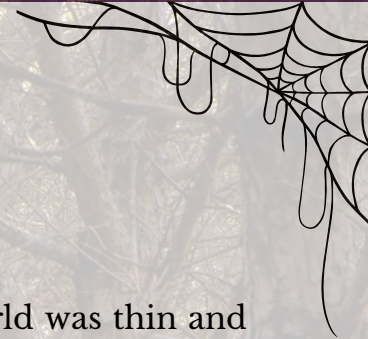




# HOW IRISH IMMIGRANTS SHAPED THE AMERICAN HALLOWEEN



CONT'D



## TRICK OR TREATING



Since this was a time when the realm between Earth and the Other World was thin and the spirits roamed the earth, there would be many evil spirits present. It was customary for people, including children, to dress up in scary costumes to frighten away the evil spirits so that they would go back into the Other World. If they couldn't frighten the evil spirits away, at least they could blend in with them to protect themselves and their children from potential harm.

People would also leave gifts of fruits and sweets outside their homes for their ancestral spirits and fairies. As a result of all these sweets being offered, many of those dressed in costumes would help themselves to the treats, especially since they were already disguised as spirits and ghouls. One popular treat offered was soul cakes, made from allspice, nutmeg, cinnamon, ginger, raisins and/or currants. When a household offered no treats, it was prone to be the victim of unwelcome tricks. Therefore, most homes would leave sweets on their doorstep to avoid any vandals. The custom of trick-or-treating was born.



## CARVING PUMPKINS

Have you ever wondered why Americans carve pumpkins during the time of Halloween and why we call these carvings "Jack-O-Lanterns"? This is another custom the Americans inherited from the Irish. However, in Ireland, it was often turnups (as well as rutabaga and mangelwurzels) that they carved, which are still used in both Ireland and Scotland today. Upon arriving to the New World, the Irish found turnups to be less plentiful than back in Ireland, but there was an abundance of a large winter squash called pumpkins. Finding that pumpkins were easier to carve than turnups and rutabagas, the switch was quite painless, and the custom of carving pumpkins during the Halloween season was born in America.





# HOW IRISH IMMIGRANTS SHAPED THE AMERICAN HALLOWEEN



CONT'D



## THE ORIGINS OF THE JACK – O – LANTERN

The origins come from an old Irish tale about Stingy Jack. There are a few different versions of this story, but here is one of them. Stingy Jack was not a nice man, who liked to drink, gamble and play tricks on his friends, family and even the Devil. One day while sitting in a pub, the Devil offered to buy Jack a drink in exchange for his soul. Jack agreed, but when the Devil changed himself into a coin to pay for Jack's drink, Jack immediately put him in his pocket next to a cross and the Devil was trapped and could not change back into his original form. Jack said that he would let the Devil free if he promised not to take his soul for a year. The Devil agreed.

A year later, Jack walked by an apple tree and saw the Devil again. The Devil said it was time to take Jack's soul. Jack agreed, but first he asked the Devil to bring him an apple. The Devil crawled up the apple tree to get Jack an apple, and Jack once again trapped the Devil by creating a circle of crosses all around the tree. Jack would not allow the Devil to be free until the Devil promised to never take his soul.

**SPOOKY**



When Jack finally died and went to Heaven, Saint Peter wanted nothing to do with him. He told Jack that he was stingy, cruel and mean and was not allowed into Heaven. Since Heaven turned him away, having nowhere to go, Jack went down to Hell. Since the Devil had promised Jack that he would not take his soul, the Devil would not allow him into Hell either. Now, Stingy Jack was scared because he had nowhere to go and now had to wander through the darkness of limbo. Jack asked the Devil how he could find his way out of Hell since it was so dark. The Devil then threw him a piece of ember from the flames of Hell. Having a turnip in his pocket, Jack carved a hole in the turnip and placed the ember inside to create a lantern to see his way. It is rumored that Stingy Jack roams the earth eternally with only his lantern he carved from a turnip. During the magical time of Samhain, or between All Hallows Eve and All Hallows Day, Jack can be seen with his lantern.





# HOW IRISH IMMIGRANTS SHAPED THE AMERICAN HALLOWEEN

## CONT'D



The ghost of Stingy Jack was called “Jack of the Lantern,” which later became “Jack-O-Lantern,” and it is why during this time, we can find an abundance of stores and patches full of pumpkins for everyone to bring home and carve with their families.

### CONCLUSION

The United States is a nation of immigrants, who have shaped our culture by introducing their customs and often adding a little twist that made them exclusively American. The next time you take an evening stroll around your neighborhood in October and see all the lit up pumpkin faces, you will now know it was the Irish who brought this thriller of a tradition and why the hollowed-out pumpkin face is called a Jack-O-Lantern.



PROUDLY SERVING ATTORNEYS ACROSS CALIFORNIA

**RHINO**  
INVESTIGATION & PROCESS SERVING

Process Serving  
Investigation  
E-Filing (self-help portal)



1-833-711-3400      LLLEGALASSISTANCE.COM

California Bureau of Security and Investigation Services-BSIS PI LIC 188947, Process Serving Registration Number PS-537 SM



# SFLPA Out and About



September 21, 2024 Luncheon for Donna Day & Other Fun



SFLPA attendees: (left) Lorri Nicolini, CCLS, Danya Gonzales, Larry McGrew, Mike Lewis & Francie Skaggs, CCLS



LPI President Donna Day



Members, family & friends from Alameda, Los Angeles, Placer, Riverside, Sacramento, Santa Clara & San Francisco celebrate with Donna



SFLPA Programs Chair Mike Lewis



LPI Executive Secretary Erika Garduno



Party favors inspired by Donna's "Embrace the Journey" theme



SFLPA Governor Lorri Nicolini, CCLS



Guest sign-in Jenga blocks



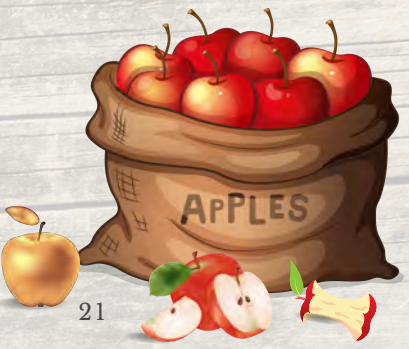
First Legal Happy Hour at Sens Restaurant in San Francisco



Alameda County LSA luncheon honoring Donna Day, Horatio's, San Leandro, CA



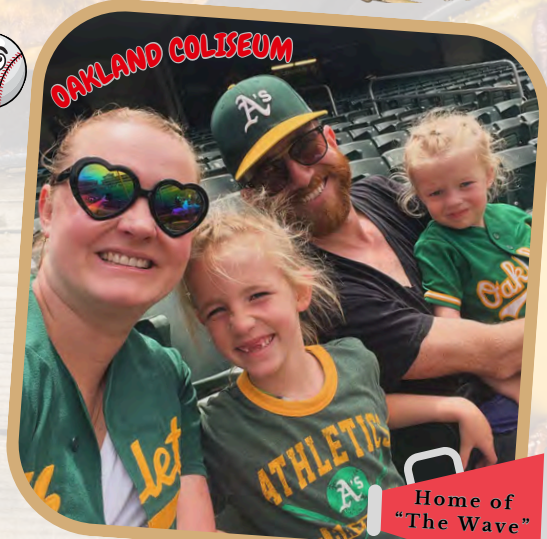
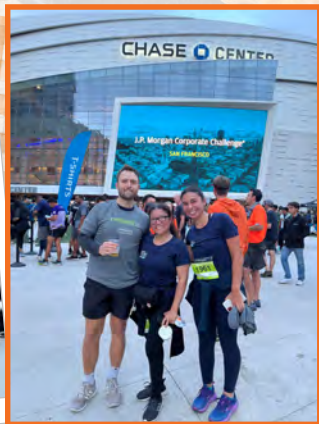
Erika Garduno's brilliant floating pearl-flower centerpiece



Vice President Suddie Scott attends a concert by the legendary John Legend



# SF LPA Out and About Cont'd.



OAKLAND COLISEUM

Home of "The Wave"

A Keker, Van Nest & Peters' 20+ year tradition - J.P. Morgan Corporate Challenge, August 22, 2024, San Francisco

Website Chair Kristen Craig-Reed & family attend an A's game at the Oakland Coliseum on July 21, 2024



Napa Valley gems, Meadowcroft & Domaine Carneros Wineries



President Francie Skaggs, Renee Evans & Bethany Ensz having a little fun in the sun



Hearsay Editor Jessica Landers & husband Daniel Palacio took a little trip to the "Windy City," aka Chicago

SF's "King of the Streets" cruise through Mission neighborhood, August 17, 2024; hosted by SF Lowrider Council



Hannah Nicole Winery VP Suddie Scott with Debi Mills & friends



LET'S GO TEAM!

# SFLPA Out and About Cont'd.



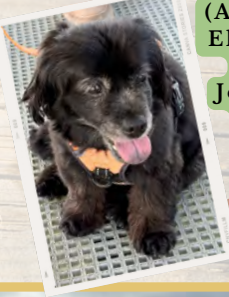
SEPTEMBER 28, 2024 GIANTS GAME &

## HAPPY HALLOWEEN VIBES

Giants 6  
Cardinals 5



The season's second PAW-SOME day at Oracle Park



(Above) Kristen & Eliza Craig-Reid; (above right) Jessica Landers; (left) Reyna, the queen



Dog lovers & pup parents invited to Oracle; (top left) Tom, Reyna & John - "La Reyna no cocina" (the queen doesn't cook)

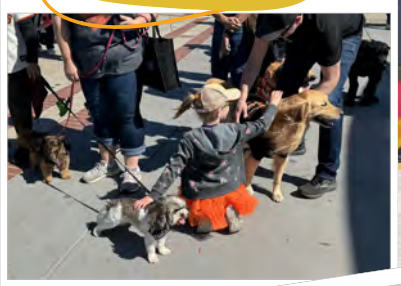


Tinkerbell, grand prize winner of best Giants-themed canine costume contest



Eliza Craig-Reid enjoying the scenic view of Oracle Park from the ferry

(Above) Michael Myers spotted on a Harley in rural Northern California [aka Bianca Puente]; (below) Sapphire & Mya cleverly disguised for Halloween terror



Suddie Scott, Mike Lewis & Lillian Wong attend First Legal Happy Hour, Sens Restaurant, San Francisco

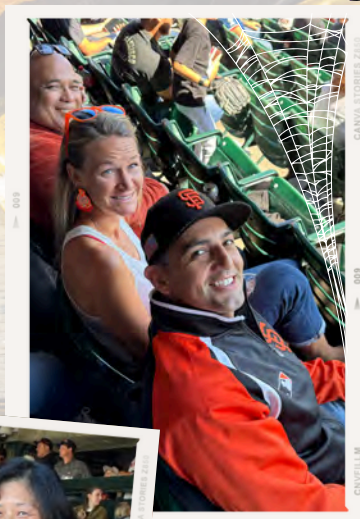
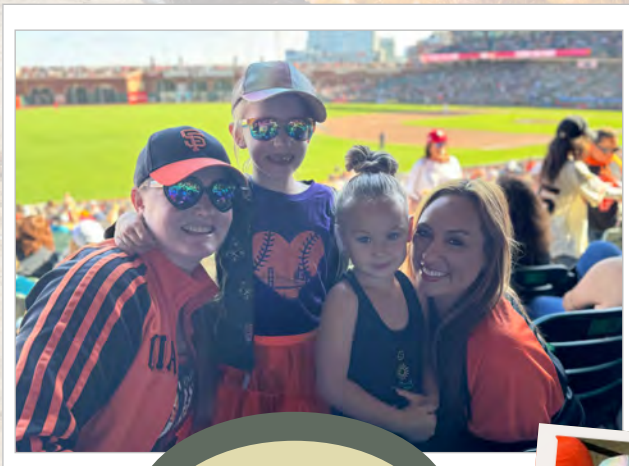


(Left) Naomi Chang; (above) Francie Skaggs, CCLS & Jameelah Hopkins; (right) Giants puppy fan



LET'S GO TEAM!

# SFLPA Out and About Cont'd.



(LEFT)  
**PRIZE WINNERS:**  
 (\$100)  
**DANYA GONZALES**  
 (\$50)  
**JESSICA LANDERS,**  
 (\$50)  
**MICHELLE WELCH,**  
 (\$50)  
**MIKE LEWIS**  
 (ABOVE)  
**KRISTEN & ELIZA**  
**CRAIG-REID,**  
**STEPHANIE & LIV RIDDELL**



(LEFT) ELIZA CRAIG-REID & LILLIAN WONG; (ABOVE) MIKE LEWIS, BROOK BRAUNSCHEWIG & LUIS PAIN; (BELOW) NAOMI CHANG, JULIA BUTEO & MIKE LEWIS



Francie Skaggs, CCLS & Emily Statler



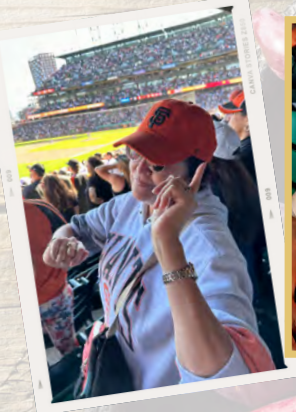
STINGY JACK WAS HERE TOO



SFLPA MEMBERS, FAMILY & FRIENDS ENJOY AN AFTERNOON AT ORACLE PARK



24 Sacramento LPA Secretary Michelle Welch, Francie Skaggs, CCLS & Emily Statler



(Above) Cathy Harrison, Marlene Beltram & Danya Gonzales; (left) Vonnie Gaines & Lillian Wong; (far left) fan does the happy dance





THE  
APTUS  
DIFFERENCE

Our goal is to develop a deep connection with each client, offering the highest level of local service and attentiveness while providing unmatched quality support.



aptus.  
COURT REPORTING

**SERVICES**

- Realtime Reporting
- Legal Videography
- Text and Video Streaming
- Picture-in-Picture (PIP) Technology
- Trial Presentation Support
- Interpreting
- Nationwide and International Coverage
- Online Case Management

To Schedule:

866.999.8310

[scheduling@aptuscr.com](mailto:scheduling@aptuscr.com)

[aptuscr.com](http://aptuscr.com)

Mention **SFLPA Hearsay** when scheduling to receive a **welcome package**

# QUARTERLY EDUCATION CONFERENCE



SPEAKER :  
**HON. ROBERTA S. HAYASHI**

Santa Clara County  
Superior Court



SPEAKER :  
**BRANDON LEAHY,  
ESQ.**

Wilson Sonsini



SPEAKER :  
**JUNE HUNTER**

CS DISCO  
U.C. San Diego Extension  
Paralegal Studies



SPEAKER :  
**VIVIAN SHREVE,  
CCLS**

Wilson Sonsini

## 6 Seminars! In Person & Via Zoom

*MCLE/CCLS Credit Available*



**Early Bird Price: \$246\***  
**(by 10.15.2024)**

Includes Registration, Friday Night Social,  
Saturday Roundtable Buffet Lunch, and  
Saturday Evening Banquet.

Full complimentary breakfast buffet available  
each day for registered hotel guests.

See website for individual event pricing.

*\*Price increases by \$10 after 10.15.2024*



**NOV. 15-17, 2024**

**EMBASSY SUITES**

1345 Treat Blvd.

Walnut Creek, CA 94597



Conference Room Rate: \$189/night  
(does not include taxes and fees)

**LINK: LPI QUARTERLY NOVEMBER**

**Reserve by 10.15.2024**

1-800-498-7397

Group Code: CES90L

Parking: Valet \$24/night or at BART Station  
Across the Street (free on weekends)



Joint Venture Partner



**REGISTER NOW**

[www.legalprofessionalsinc.org/events](http://www.legalprofessionalsinc.org/events)



Joint Venture Partner

# HOW LEGISLATIVE BILLS ARE ADDRESSING THE HOUSING CRISES IN CALIFORNIA

Some Have Been Signed into Law by Governor Newsom, and Others Will be Decided by Voters on November 5

*By Francie Skaggs, CCLS*



It is hard to disagree that California is dealing with a housing shortage. When demand is high and inventory is low, prices increase. However, before you pack up and leave our beautiful state, know that state agencies and legislators are writing proposed laws, many of which will be voted on by California voters in the upcoming November 5th election. Some laws have already been implemented to address the crises.

California voters will have the opportunity on November 5 to vote on two propositions that appear to address both housing and rent. Proposition 5 would allow local bonds for affordable housing and public infrastructure with 55% voter approval. Proposition 33 would expand local government authority to enact rent control on residential property. What this means is that it will remove state control and allow cities and counties to implement their own laws.

Both propositions address housing in California; however, it is important to pay attention to the fine print and carefully read both the pros and cons regarding these propositions. For more information on each initiative, go to <https://voterguide.sos.ca.gov/propositions/> for the pros and cons and contact information for sources who can convey a more detailed understanding of each.

The following article, written by three attorneys from Coblenz Patch Duffy & Bass LLP, focuses on the bureaucratic barriers of housing development in San Francisco and the goal of Senate Bill 423 to chip away at San Francisco's housing crisis for a broader swath of residential production. San Francisco is one of many cities with a housing crisis and unaffordable mortgage and rent.



*Feature Article*

# AS SAN FRANCISCO FAILS TO MEET ITS HOUSING GOALS, THE CITY'S APPROVAL PROCESS FOR HOUSING PROJECTS JUST GOT MUCH (MUCH) FASTER AND EASIER

*Authors* Miles H. Imwalle, Esq., Daniel Gershwin, Esq. and Stephanie Straka, Esq.

COBLENTZ PATCH DUFFY & BASS LLP



As expected, on June 28, the California Department of Housing and Community Development (HCD) determined that San Francisco had not made adequate progress toward its State-mandated housing production goal. The City's Housing Element—which it adopted and HCD certified in January 2023, just in time to avoid triggering certain penalties under the State Housing Element Law—sets forth the City's plan to approve 82,000 units over an eight-year period ending in January 2031. However, according to its most recent Housing Inventory, San Francisco approved only 3,039 new units in 2023, and the City has yet to adopt the zoning amendments required by State law to implement the Housing Element.

Senate Bill 423 requires San Francisco, specifically, to annually demonstrate that it is keeping pace with its housing production. HCD's June 28th determination means that many mixed-income housing development projects in San Francisco will now be subject to a streamlined, ministerial approval process. Qualifying projects will be approved by Planning staff and will not require a public approval hearing by the Planning Commission or Board of Supervisors, although in many neighborhoods a pre-application informational hearing at the Planning Commission will be required.

To qualify, projects must be at least 2/3 housing, meet specified labor requirements, and meet certain site-specific criteria—including that the project be located on a residentially-zoned site, not demolish tenant-occupied or rent-controlled units, and not demolish historic structures listed on a historic register—among a few other requirements. Importantly, prior to HCD's determination, projects also had to restrict 50% of units in the project as affordable to households at 80% area median income (AMI). Now, however, the affordability requirement has been drastically reduced to just 10% of the units in the project, which must be affordable to households at 50% AMI. While the percentage of affordable units required to qualify for streamlined review is now lower, SB 423 does not relieve projects from local inclusionary housing requirements if such requirements are higher.

*Feature Article*





# AS SAN FRANCISCO FAILS TO MEET ITS HOUSING GOALS, THE CITY'S APPROVAL PROCESS FOR HOUSING PROJECTS JUST GOT MUCH (MUCH) FASTER AND EASIER



Cont.

If the criteria are met, the following projects must be approved ministerially:

- Code-compliant projects with 2-9 dwelling units.
- Code-compliant projects with 10 or more dwelling units that meet San Francisco's inclusionary affordable housing requirements.

Notably, Code-compliant projects include projects that take advantage of State Density Bonus Law to increase their unit count above what would typically be permitted under existing zoning. The City's application for streamlined approval pursuant to SB 423 is available [here](#).

Under SB 423, projects of 150 units or fewer must be approved within 90 days of submittal of an application, and projects with more than 150 units must be approved within 180 days. As stated in a [press release](#) by former San Francisco Supervisor and now State Senator, Scott Wiener, who authored SB 423, as of June 28 San Francisco is going "from the slowest approver of new homes in California to one of the fastest."

Due to San Francisco's specific annual housing production progress requirement and the City's lack of progress to date, the City is likely to remain out of compliance. Accordingly, projects complying with San Francisco's inclusionary affordable housing requirements and SB 423's site criteria may qualify for streamlined, ministerial review for the foreseeable future. For the time being, we note that 18 other Bay Area jurisdictions do not have compliant Housing Elements and are therefore subject to the same reduced affordability requirement to qualify for SB 423 streamlining benefits. Those jurisdictions are currently Atherton, Belmont, Cupertino, Daly City, Hercules, Lafayette, Larkspur, Los Gatos, Napa County, Palo Alto, Pittsburg, Portola Valley, San Mateo, San Mateo County, Santa Clara County, Saratoga, Woodside, and Yountville. Unlike San Francisco, most or all of these Bay Area jurisdictions will return to the higher 50% affordable requirement when their Housing Elements become compliant, which for some of these jurisdictions could happen within days or weeks.

Coblentz attorneys will continue to monitor Housing Element compliance and other developments as they relate to these and other jurisdictions.

*Feature Article*





**LPI** LEGAL PROFESSIONALS INCORPORATED  
*Educating California's Legal Support Professionals*

LEGAL PROFESSIONALS, INC.  
 PRESENTS . . .  
 BROWN BAG WEBINAR

# SURROGACY AND EGG DONATION 101: THE BASICS OF ART CONTRACTS FROM MATCH TO CLEARANCE



**OCTOBER 22, 2024**  
**12:30 PM-1:30 PM**

DEADLINE TO REGISTER:  
 OCTOBER 22, 2024  
 AT 10:00 AM  
 REGISTER ONLINE  
[WWW.SFLPA.ORG/EVENTS](http://WWW.SFLPA.ORG/EVENTS)  
 -CALENDAR/  
 OR SCAN THIS QR CODE:

SPEAKER PRESENTED BY:  
 SAN FRANCISCO LPA



PRESENTED BY:  
**DEBBYE ROSENTHAL &  
 NIKKI WEHMEIR**



## ABOUT THE PRESENTERS

DEBRAH "DEBBYE" ROSENTHAL FIRST DISCOVERED HER PASSION FOR THE FIELD OF THIRD PARTY REPRODUCTIVE LAW WHILE ATTENDING THE UNIVERSITY OF CALIFORNIA, SAN DIEGO. AN HONORS GRADUATE, DEBBYE RECEIVED HER BACHELOR'S DEGREE IN SOCIOLOGY, WITH A MINOR IN LAW AND SOCIETY. DEBBYE THEN OBTAINED HER LAW DEGREE FROM THE THOMAS JEFFERSON SCHOOL OF LAW IN SAN DIEGO, CALIFORNIA WHERE SHE GRADUATED CUM LAUDE, WHILE IN LAW SCHOOL, DEBBYE HONED HER LEGAL KNOWLEDGE OF THIS EMERGING FIELD AS A TEACHING ASSISTANT FOR A REPRODUCTIVE JUSTICE CLASS AND SERVING AS AN EXECUTIVE BOARD MEMBER OF LAW STUDENTS FOR REPRODUCTIVE JUSTICE. SHORTLY AFTER PASSING THE CALIFORNIA BAR EXAM, DEBBYE BEGAN WORKING FOR A SMALL ASSISTED REPRODUCTIVE TECHNOLOGY LAW OFFICE IN LOS ANGELES. AFTER A FEW YEARS WITH THE LOS ANGELES OFFICE, DEBBYE MADE THE DECISION TO OPEN HER OWN FIRM IN ORANGE COUNTY. SINCE THAT TIME SHE'S BEEN LIVING IN ORANGE COUNTY, WHERE SHE ENJOYS SPENDING TIME WITH FRIENDS AND FAMILY AT THE BEACH, RIGOROUS WORKOUTS AT THE LOCAL GYM, WALKS WITH THE OFFICE DOG, BENNY, AT BALBOA ISLAND, AND TRIPS TO DISNEYLAND. DEBBYE IS AN ACTIVE MEMBER OF THE ACADEMY OF CALIFORNIA ADOPTION-ART LAWYERS, THE SOCIETY FOR ETHICS IN EGG DONATION AND SURROGACY, AND ABA ART DIVISION.



NIKKI HAS WORKED IN THE INFERTILITY INDUSTRY SINCE 2009. AS THE EGG DONATION PROGRAM MANAGER AT BE EGG DONATION, SHE BRINGS A WEALTH OF EXPERTISE IN BOTH EGG DONATION AND SURROGACY, WITH A PARTICULAR FOCUS ON SUPPORTING INTENDED PARENTS AND EGG DONORS THROUGHOUT THEIR UNIQUE JOURNEYS. NIKKI ADVOCATES FOR OPEN AND SEMI-OPEN DONATION AGREEMENTS, REGULARLY LENDING HER VOICE TO THEIR IMPORTANCE. A FOUNDING MEMBER OF SEEDS (SOCIETY FOR ETHICS IN EGG DONATION AND SURROGACY), NIKKI CURRENTLY SERVES AS CHAIR OF THE NEWSLETTER COMMITTEE AND IS AN ACTIVE MEMBER OF THE DONOR CONCEIVED COMMUNITY'S PROFESSIONALS GROUP. OVER THE YEARS, SHE HAS HAD THE PRIVILEGE OF PLAYING A SIGNIFICANT ROLE IN THOUSANDS OF FAMILY-BUILDING JOURNEYS. HER DEDICATION EXTENDS BEYOND HER PROFESSIONAL WORK, HAVING DONATED HER UTERUS IN A TRANSPLANT TRIAL TO HELP A WOMAN BORN WITHOUT ONE. NIKKI'S PERSONAL CONNECTIONS TO THE INFERTILITY COMMUNITY RUN DEEP, THROUGH THE MANY FRIENDS AND FAMILY MEMBERS SHE HAS SUPPORTED, INCLUDING HER BROTHER AND SISTER-IN-LAW ON THEIR IVF JOURNEY TO HER TWO NEPHEWS. HER PASSION FOR FAMILY BUILDING, COMBINED WITH HER COMPASSION AND EXPERTISE, DRIVES HER TO MAKE A POSITIVE IMPACT IN THE LIVES OF THOSE SHE HELPS. SHE IS ALSO A MOTHER OF TWO (A DAUGHTER WHO IS ALMOST 24 AND A SON WHO IS 15....AS WELL AS "FUR MOM" TO TWO DOGS, AWESOME AND BETTY WHITE.

THIS WEBINAR IS APPROVED FOR CALIFORNIA MINIMUM CONTINUING LEGAL EDUCATION (MCLE) CREDIT AND CCLS CREDIT IN THE AMOUNT OF 1.0 HOUR. FOR MORE INFORMATION ABOUT THE PROGRAMS AND EVENTS, VISIT OUR WEBSITE AT: [WWW.SFLPA.ORG](http://WWW.SFLPA.ORG).



California Certified Legal Secretary  
A Program of LPI®



## APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LPI Membership Card (if applicable), and fees to:  
Vivian L. Shreve, CCLS, c/o WSGR, 650 Page Mill Road, Palo Alto, CA 94304

(Select one)  Northern California  Southern California

(Select one)  Saturday, September 18, 2021  Saturday, March 19, 2022

Saturday, September 18, 2021  Saturday, March 19, 2022

- **Deadline:** Applications must be received **60 days** prior to the examination date.
- **Late Application:** Late Fees apply when Applications are received less than **60 days** (but not less than 30 days) prior to the examination date, and accepted only if space is available.
- **Deferral:** Requests to defer to the next exam must be received at least **30 days** prior to the exam date.

EXAMINATION FEES (Select Payment Type)		Check <input type="checkbox"/>	PayPal <input type="checkbox"/>
		Payable to "LPI" Mail to above address	Email exam application to <a href="mailto:CCLSCertifyingBoard@gmail.com">CCLSCertifyingBoard@gmail.com</a> . Payment link will be provided upon confirmation of eligibility to sit for exam.
<b>LPI Members</b> <input type="checkbox"/>		<b>Non-LPI Members</b> <input type="checkbox"/>	
On Time Registration Fee	\$ 25.00	On Time Registration Fee	\$ 75.00
Examination Fee*	100.00	Examination Fee*	100.00
Late Fee (if applicable)	45.00	Late Fee (if applicable)	45.00
<b>TOTAL DUE w/o Late Fee:</b>	<b>\$125.00</b>	<b>TOTAL DUE w/o Late Fee:</b>	<b>\$175.00</b>

### Personal Information

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Last 4 digits of SSN: \_\_\_\_\_ Email: \_\_\_\_\_

Phone (Day): \_\_\_\_\_ Phone (Evening): \_\_\_\_\_

LPI Member:  Yes (enclose copy of LPI Membership Card)  No

Name of Local LPI Association: \_\_\_\_\_

### Employment Information

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

Position: \_\_\_\_\_ Dates of Employment: \_\_\_\_\_

Employer: \_\_\_\_\_  
(name and address)

Supervisor: \_\_\_\_\_ Supervisor's Phone: \_\_\_\_\_

Supervisor's Email: \_\_\_\_\_

Summary of Duties: \_\_\_\_\_

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

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

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

\*Fees subject to change without notice.

Rev. April 2020



# Legal Procedure



## California Court Chatter

**Danya Gonzales, Legal Procedure Chair, with collaboration from Lisa Hamann**

### **UNITED STATE DISTRICT COURT, NORTHERN DISTRICT OF CALIFORNIA - NEW DOCUMENT-FREE METHOD FOR FILING NOTICES OF APPEARANCE, SUBSTITUTION AND WITHDRAWAL IN CIVIL CASES (IN EFFECT)**

Filing most notices of appearance, substitution and withdrawal no longer require preparation of a separate document in the Northern District's ECF system. These actions should be filed using the ECF omnibus event entitled "Notice of Appearance/ Substitution/Withdrawal of Attorney" (found in Civil Events → Other Filings → Notices).

**Notice of appearance:** Any attorney who is already a member of the N.D. Cal. Bar can simply log in to ECF, select the new ECF event, enter the case number and party they represent, and press "submit." The attorney can file documents on behalf of their client within minutes of filing this notice.

**Notice of substitution:** Using the same ECF event, the newly-appearing attorney (already a member of the N.D. Cal. Bar) provides the name of the lawyer(s) leaving the case. The court will remove the attorney(s) substituted out from the docket within one business day.

**Notice of withdrawal or change in counsel:** An attorney may withdraw from a case if other counsel for that party remain. The attorney withdrawing so indicates by using the new ECF event. Alternatively, an attorney on the case may indicate that an attorney from the same firm is withdrawing. Within one business day, the attorney seeking withdrawal will no longer be associated with the case.

Some instances still require filing of a PDF.

- When one firm seeks to replace another firm, the filing attorney should use Motion to Substitute Firm (under Motions – General), along with the form motion with a proposed order on the court's website under Civil Forms called "Substitute Law Firm; Proposed Order."





# Legal Procedure



## Court Chatter Cont'd.

- When an attorney who is the sole remaining counsel for a party seeks to withdraw, the attorney should prepare a supporting document and file a Motion to Withdraw as Attorney (under Motion – General).

For additional information on this new method, please visit the Court's website at <https://www.cand.uscourts.gov/notices/new-document-free-method-for-filing-notices-of-appearance-substitution-and-withdrawal-in-civil-cases/>.

### **ALAMEDA COUNTY SUPERIOR COURT - JURORS TO RECEIVE INCREASED COMPENSATION FOR SERVICE (EFFECTIVE SEPTEMBER 2, 2024)**

Alameda County jurors began receiving \$100 a day and enhanced mileage benefits through a state-funded pilot program created to determine if increased financial benefits will result in increased participation and diversity of juries.

The pilot program began providing jurors \$100 a day and \$0.67 per mile for travel to and from the courthouse on the second day of jury service after September 2, 2024.

The Superior Court of Alameda County is one of seven superior courts participating in the pilot program. The other courts are the Superior Courts of El Dorado, Fresno, Imperial, Monterey, San Bernardino and Shasta counties. The program is being funded by California's General Fund.

The Jury Pilot Program was created as part of AB 1981 which was passed by the State Legislature and signed by Governor Gavin Newsom in 2022.

The Jury Pilot Program will continue for two years or until the approximately \$27 million set aside for the program is exhausted.

Jurors can waive receiving the compensation. Jurors who earn more than \$600 for their jury service will have to pay taxes on that income. The mileage reimbursement, however, is not taxable income.

For more information about the Jury Pilot Program, visit the Court's website at <https://www.alameda.courts.ca.gov/news/jurors-receive-increased-compensation-service> and the Judicial Council of California website here <https://www.courts.ca.gov/76616.htm>.



# Legal Procedure



## Court Chatter Cont'd.

### **LOS ANGELES COUNTY SUPERIOR COURT – GENERAL ORDER 2024-GEN-011-00 ALLOWING ELECTRONIC RECORDING IN SPECIFIED CIRCUMSTANCES TO PROTECT LITIGANTS’ CONSTITUTIONAL RIGHTS (EFFECTIVE SEPTEMBER 5, 2024)**

General Order 2024-GEN-011-00 provides access to a verbatim record of court proceedings for thousands of litigants who have previously been denied access due to worsening court reporter shortages and restrictions on electronic records.

The General Order enables judicial officers presiding over Family Law, Probate and Civil contempt proceedings to instruct court staff, when a court reporter is not available, to operate electronic recording equipment so that litigants have access to a verbatim record of those proceedings. The Order applies only when the judicial officer finds that: (1) the proceeding concerns matters that implicate fundamental rights or liberty rights; (2) one or more parties wishes to have the possibility of creating a verbatim transcript of the proceedings; (3) no official court-employed court reporter is reasonably available to report the proceeding; (4) the party so requesting has been unable to secure the presence of a private court reporter to report the proceeding because such court reporter was not reasonably available or on account of that party’s reasonable inability to pay; (5) the proceeding involves significant legal and/or factual issues such that a verbatim record is likely necessary to create a record of sufficient completeness; and (6) the proceeding should not, in the interests of justice, be further delayed. Each judicial officer, in their discretion, will evaluate on a case-by-case basis any request to operate the electronic recording equipment.

The General Order is effective immediately throughout the Superior Court of Los Angeles County in the specified case types.

For more information on General Order 2024-GEN-011-00, please visit the Court’s website at

<https://www.lacourt.org/newsmedia/uploads/142024951002COURTISSUESGENERALORDERALLOWINGELECTRONICRECORDING.pdf> and

<https://drive.google.com/file/d/1k9ZBbmf6J1TiciK40HrQTVEJDUdZ7Pwl/view>.



# Legal Procedure



## Court Chatter Cont'd.

### **SAN FRANCISCO COUNTY SUPERIOR COURT – TRAFFIC HEARINGS TO BE DISCONTINUED AT HALL OF JUSTICE (EFFECTIVE OCTOBER 7, 2024)**

Effective October 7, 2024, all traffic hearings are discontinued at the Hall of Justice, Department A, and permanently relocated to the Civic Center Courthouse in Department 218.

- To contest a ticket - Traffic tickets will continue to instruct people to initially report to the Hall of Justice, 850 Bryant St., Room 145, to schedule a hearing.
- Effective October 7, 2024, hearings ONLY will be held at the Civic Center Courthouse, Dept. 218. No hearings will be held at the Hall of Justice.

To make it more convenient and less expensive to travel to the courthouse for hearings, people with traffic tickets may request a Zoom hearing, which are held on Wednesdays only. There are two ways to request a Zoom hearing:

- **In person.** Go to the Hall of Justice, Room 145, to request a hearing. Effective October 7, hearings may be requested in person at the Civic Center Courthouse, Room 103.
- **Remotely via LiveChat.** Request a hearing via LiveChat at this link: <https://sf.courts.ca.gov/divisions/traffic>.

More information about this press release and how to resolve a traffic citation, including contesting a citation or paying a fine, visit the Court's website at <https://sf.courts.ca.gov/system/files/news/24traffic.pdf> and <https://sf.courts.ca.gov/divisions/traffic>.

### **SAN MATEO COUNTY SUPERIOR COURT - PUBLIC SERVICE HOURS REDUCED (EFFECTIVE OCTOBER 7, 2024)**

REDWOOD CITY – Public service hours for the Civil, Probate, Family Law, and Records Management divisions were reduced effective October 7, 2024 as the San Mateo County Superior Court continues to adapt to the impacts of state budget cuts.



# Legal Procedure



## Court Chatter Cont'd.

Public service hours in Room A at the Hall of Justice Courthouse for the Civil, Probate, Family Law, and Records Management divisions have been cut back to 8:30 a.m.–1:00 p.m., Monday–Friday as of October 7, with exceptions made for ex parte matters only.

Filings for ex parte matters will be accepted in Room A after 1:00 p.m., and no later than 2:15 p.m., Monday–Friday. Instructions to contact the appropriate clerk’s office staff for ex parte matters will be displayed after the doors to Room A close at 1:00 p.m.

The nearly \$4 million in revenue shortfalls due to state budget cuts, including the approximately \$1.45 million in on-going funding reductions allocated to the San Mateo County Superior Court, have necessitated a continued hiring freeze impacting all court divisions. The Court remains committed to serving all court users while operating with a reduced workforce. Updates will be communicated to the public as they become available on the Court’s website: [sanmateo.courts.ca.gov](http://sanmateo.courts.ca.gov).

### **AB 2049 – MOTIONS FOR SUMMARY JUDGMENT: NEW FILING DEADLINES (EFFECTIVE JANUARY 1, 2025)**

Existing law requires a motion for summary judgment or summary adjudication in a civil action or proceeding to be served and filed at least 75 days before the hearing on the motion. Existing law requires an opposition to the motion to be served and filed at least 14 days before the hearing and a reply to the opposition to be served and filed at least 5 days before the hearing.

This bill would change the deadline for a party to file a motion for summary judgment or summary adjudication to at least 81 days before the hearing on the motion. The bill would change the deadlines for filing an opposition to at least 20 days before the hearing and for filing a reply to at least 11 days before the hearing. The bill would prohibit a party from filing more than one motion for summary judgment against an adverse party without leave of court, as specified. The bill would also prohibit the introduction of new facts in a reply to an opposition to a motion for summary judgment, as specified.

For more legislative information on this Bill, visit the Governor of California’s website at: [https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\\_id=202320240AB2049](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202320240AB2049).



# Legal Procedure



## Court Chatter Cont'd.

### **SENATE BILL 1034 – CALIFORNIA PUBLIC RECORDS ACT: STATE OF EMERGENCY (PASSED ON JULY 18, 2024)**

The California Public Records Act requires state and local agencies to make their records available for public inspection, except as specified. Existing law requires each agency, within 10 days of a request for a copy of records, to determine whether the request seeks copies of disclosable public records in possession of the agency and to promptly notify the person of the determination and the reasons therefor. Existing law authorizes that time limit to be extended by no more than 14 days under unusual circumstances and defines unusual circumstances to include certain circumstances.

This bill would revise the unusual circumstances under which the time limit may be extended to include the need to search for, collect, and appropriately examine records during a state of emergency, as defined, proclaimed by the Governor in the jurisdiction where the agency is located when the state of emergency currently affects, due to the state of emergency, the agency's ability to timely respond to requests due to staffing shortages or closure of facilities where the requested records are located, except as specified.

For more information on this Bill, visit the California Legislative Information page on SB 1034 at: [https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\\_id=202320240SB1034](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202320240SB1034) and CalMatters website at: [https://digitaldemocracy.calmatters.org/bills/ca\\_202320240sb1034](https://digitaldemocracy.calmatters.org/bills/ca_202320240sb1034).

### **STATE BUDGET REDUCTIONS TO THE TRIAL COURTS AND JUDICIAL BRANCH ADMINISTRATION (IN EFFECT)**

In July 2024, Governor Newsom signed a budget that cut \$97 million from California's trial courts for the Fiscal Year 2024-25. In addition to this budget reduction, the state budget also called for a reduction of 7.95% to the state-level judiciary, which includes the Supreme Court, Courts of Appeal, Habeas Corpus Resource Center, and the Judicial Council. These cuts are part of an effort to address an anticipated \$46.8 billion statewide budget deficit.

The cuts will be ongoing into next year, and are impacting the trial courts in different ways around the state and Californians who rely on these courts.



# Legal Procedure



## Court Chatter Cont'd.

Anticipating deep cuts, the Los Angeles County Superior Court instituted a “Voluntary Separation Incentive Program” in July for eligible employees to vacate positions to reduce ongoing operating expenses. While the Court leverages the impact on the reduction of core services, such measures will no doubt impact the Court’s ability to provide timely and efficient access to justice for Los Angeles County residents.

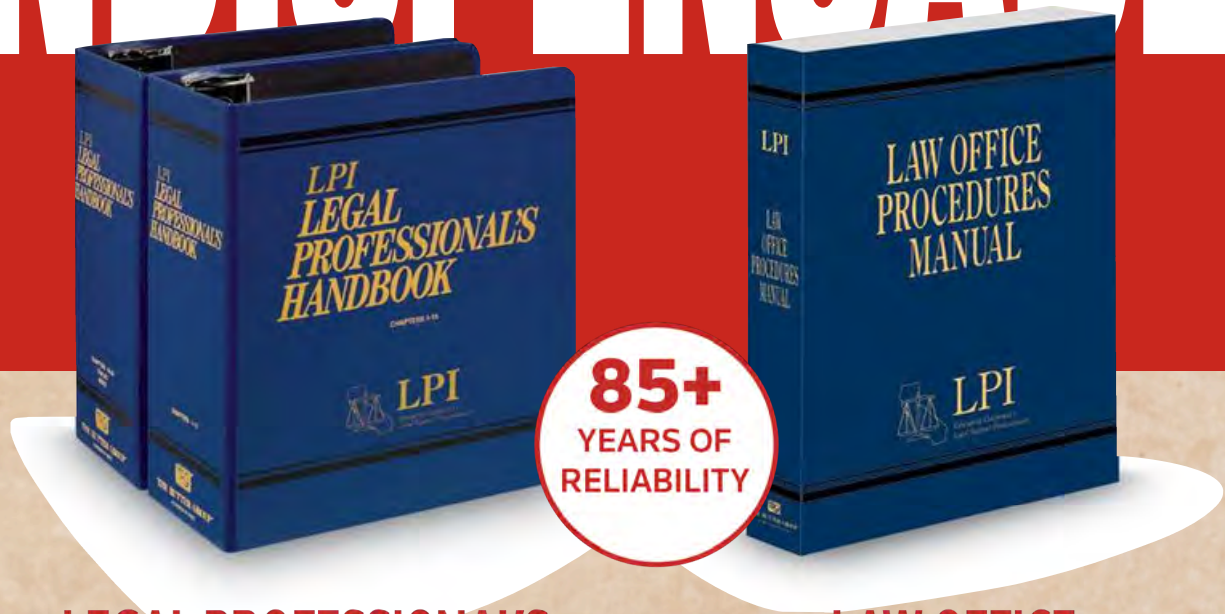
Other courts have implemented similar cost-saving measures. Alameda County instituted a voluntary time off program, asking employees to take unpaid leave during Christmas. Effective October 7, San Mateo County Superior Court’s public service hours for the Civil, Probate, Family Law, and Records Management divisions were cut back from 8:30 a.m.-1:00 p.m. Monday-Friday, with some exceptions. Other courts have necessitated a hiring freeze while operating with a reduced workforce.

Despite the courts’ efforts to mitigate the impact of these cuts, court users should expect reduced or delayed services, longer lines at the clerk’s office windows, delays in call center response time, and legal document processing.

For more information on the state’s budget reduction on local trial courts, please visit the California Courts Newsroom New Release at <https://newsroom.courts.ca.gov/news/judicial-council-allocates-funding-trial-courts-97-million-required-cut>, and the Los Angeles County Superior Court’s News Release at <https://www.lacourt.org/newsmedia/uploads/14202471102334NR07-01-2024-COURTTOREDUCESTAFFANDELIMINATEVACANTPOSITIONS.pdf>.



# INDISPENSABLE



## LEGAL PROFESSIONAL'S HANDBOOK

...THE ULTIMATE RESOURCE GUIDE!

Busy lawyers rely on their staff to handle many details of their practice. They look to you, as a professional, to know what to do, and when and how to do it. The *Legal Professional's Handbook* provides you with the answers . . . just as it has for over 85 years! Each chapter contains detailed practice forms and step-by-step instructions covering every major area of California law practice. The Handbook is an invaluable resource to add to your entire reference library!

LPI Members-Only Price .....\$441

Nonmembers Price .....\$630

Price includes shipping. Add applicable sales tax.

This title is updated annually for subscribers by full content replacement pages.

## LAW OFFICE PROCEDURES MANUAL

...THE IDEAL TRAINING MANUAL FOR NEW STAFF!

This must-have manual and forms guide contains detailed practice forms for major areas of law practice, both civil and criminal, along with step-by-step instructions for completing them. The manual includes Judicial Council forms and California recording laws. The manual also provides procedural checklists, transcriptions and proofreading tips, sample calendar notations, practice tips for filing documents with the court, and a glossary of legal terms.

LPI Members-Only Price .....\$229.60

Nonmembers Price .....\$328

Price includes shipping. Add applicable sales tax.

This title is updated twice yearly for subscribers by replacement edition.

Buy both LPI books together and get a discount!  
Combo price for both books.....\$670.60  
Price includes shipping. Add applicable sales tax.

LPI Members, call for discount!

COMPILED BY

**LEGAL PROFESSIONALS, INCORPORATED**

PUBLISHED BY

**THE RUTTER GROUP™**

**THOMSON REUTERS®**


TO ORDER OR FOR MORE INFO, CALL  
**1-800-747-3161 (Ext. 2)**  
www.TheRutterGroup.com

# Just a Few LPI Events

Go to: <https://www.legalprofessionalsinc.org/events/> for more LPI events!

## Microsoft Office, Using and Modifying Styles

**LPI**  
LEGAL TECHNOLOGY TRAINING  
PRESENTED BY:  
**JUNE HUNTER**



**October 15, 2024**  
**12:00 P.M. - 1:00 P.M.**

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

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

The styles feature in Word is a useful, time-saving tool that will allow you to streamline your work. This webinar will take a deep dive into Word's features, including built-in themes, how to identify, create and modify styles and how to troubleshoot formatting issues.

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](mailto:training@legalprofessionalsinc.org)

**About the Trainer**  
June Hunter is a Technical Enablement Specialist at DISCO and teaches computer essentials to CCLSI in 8 non-attorney in their ASA approved Trial Prep Courses in California. June Hunter is an affiliate of Legal Professionals, Incorporated, an approved provider, and certifies that this activity is approved for 1.0 hour of CCLSI credit.

## COMMON CALENDARING PITFALLS

**LPI**  
CONTINUING LEGAL EDUCATION



**Presented by:**  
**Carla Clark, CCLS**

**OCTOBER 17, 2024**  
**12 PM to 1 PM**

**FREE for LPI Members**  
**\$55 for Non-LPI Members**

- The price increases \$5 after 10.03.24
- Registration closes 10.10.24

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

THIS WEBINAR HAS BEEN APPROVED FOR CALIFORNIA MINIMUM CONTINUING LEGAL EDUCATION CREDIT IN THE AMOUNT OF 1.0 CREDIT HOUR.

## TRIAL BINDERS

**LPI**  
UNIVERSITY

**The Best Tool in Your Trial Prep Toolbox**

Your trial binder is your trial bible! In this webinar, we will take a look at the essentials that should be in your binder, as well as the "secret" essentials that will make you look like a superstar!

**October 28, 2024, 12:00 P.M. to 1:00 P.M.**  
**LPI Member - \$25 / Non-LPI Member - \$55**

**Presented by: Lynne Prescott, CCLS**  
Lynne is LPI's Legal Education Instructor and LPI Past President from 2009-2022. She currently teaches LPI's Intermediate and Advanced Legal Professional Training Courses, as well as beginning level classes in the Sacramento area. Lynne has been a legal professional for over 30 years, with broad and specialized experience in several practice areas.

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

LEGAL PROFESSIONALS, INC. IS AN APPROVED PROVIDER AND CERTIFIES THAT THIS WEBINAR IS APPROVED FOR MINIMUM CONTINUING LEGAL EDUCATION (MCLE) CREDIT IN THE AMOUNT OF 1.0 HOUR BY THE STATE BAR OF CALIFORNIA, AND IS APPROVED FOR 1.0 HOUR OF CCLSI CREDIT.

## Ethics and Trust Accounts

**LPI**  
UNIVERSITY

**INSTRUCTOR:**  
**BETHANY S. ENSZ, M.S.**

**October 22, 2024**  
**12:00 PM - 1:00 PM**

Learn what client trust accounting is and the rules that safeguard the client and legal professionals. This class will also cover recent rule changes and provide examples of how to avoid the most common pitfalls that legal professionals find themselves in.

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

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

**ABOUT THE TRAINER**  
Bethany S. Ensz, 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, and was with Shepard, Mullin, Ritchie & Hampton LLP prior to that. Bethany is a graduate 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.

This webinar 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 CCLSI credit.

## Cross the bridge to success, become a CCLS!

**California Certified Legal Secretary**

**LPI** LEGAL PROFESSIONALS INCORPORATED  
Educating California's Legal Support Professionals








Looking for a local attorney service?

**Call ASAP LEGAL today!**

Our experts are standing by to help you on:



24/7 eFiling



Court Services



Service of Process



Records Retrieval



Investigations



Messenger



Litigation Support



**ASAP Legal** is the #1 boutique local attorney service in **California!**

Call us now for your next assignment!

ASAP Legal -Oakland Office

[oakland@asaplegal.com](mailto:oakland@asaplegal.com)

(510) 785-2300



# Become a Member

San Francisco Legal Professionals is a mutual benefit corporation formed for the primary purpose to provide its members with educational, networking, and personal development opportunities through a range of services. We have three different membership categories:

## Active Membership

- You are currently employed by or have at least one-year experience, including temporary or freelance work, with a law firm, the legal department of a private company or government entity, a courthouse or other company that is legally entitled to provide legal advice and counseling to the public; employed by any business which provides legal support services
  - Have attended at least one SFLPA function.
- Submit with your application dues in the amount of \$80.00 for the first fiscal year of membership. \$70.00 for renewal.

## Associate Membership

- You are a student enrolled in a legal trade school or currently attend college and are enrolled in legal classes; are temporarily unemployed in the legal profession, or are actively seeking employment in the legal field.
  - Have attended at least one SFLPA function.
- Submit with your application dues in the amount of \$60.00 per fiscal year. \$50.00 for renewal.
  - Student Membership

## Membership Renewals

- If you are a current member and wish to renew your membership, you may renew online or download a form to mail your renewal.

If you are interested and would like to learn more about the services provided within the SFLPA, please visit our website at: [www.sflpa.org](http://www.sflpa.org). To apply for membership, click on the Membership Tab and fill out our online application form. Payments can be made via credit card online.

Our application forms are also available to download. Applications and payments can be received by mail. Address information as well as who to make checks payable to are also provided on the forms.

If you have questions and would like to speak to someone, please send an email to our Vice President/Membership Chair: Suddie Scott. Send your email to: [membership@sflpa.org](mailto:membership@sflpa.org).

# LPI BENEFITS

## LEGAL PROFESSIONALS INCORPORATED (LPI) - BENEFITS

*Note: This list is maintained for use by members of Legal Professionals, 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. For information, call these representatives directly. For questions and concerns regarding Member Benefits, please contact the LPI Vice President at [vicepresident@legalprofessionalsinc.org](mailto:vicepresident@legalprofessionalsinc.org).*

<p><b>LEGALSHIELD/IDSHIELD</b>            Contact: Courtney Coats, Independent Associate            (925) 580-6446, <a href="mailto:coats8@legalshieldassociate.com">coats8@legalshieldassociate.com</a>            LegalShield offers legal, identity theft protection, along with a massive Perks Program with significant savings to over 500 local and national companies.</p>	<p><b>EMPLOYEE AND MEMBER DISCOUNTS</b>  <a href="https://www.employeeandmemberdiscounts.com/employee-discounts-and-offers/legal-secretaries-incorporated/">https://www.employeeandmemberdiscounts.com/employee-discounts-and-offers/legal-secretaries-incorporated/</a>            Discounts on auto and car, entertainment, financial, health and medical, home services, insurance and warranty services, travel and vacation, pet care, and other unique offers.</p>
<p><b>WORKING ADVANTAGE</b>            Toll Free: (800) 565-3712  <a href="http://www.workingadvantage.com">www.workingadvantage.com</a>            Discounts on events, movies, theme parks, live theater, sporting events, ski tickets, hotels, family events, gift cards and more.            Member ID: Contact LSI Corporate Office at <a href="mailto:info@lsi.org">info@lsi.org</a>, or LSI Vice President.</p>	<p><b>PROVIDENT CREDIT UNION</b>            303 Twin Dolphin Drive            P.O. Box 8007            Redwood City, CA 94603-0907            (800) 632-4699 - (650) 508-0300  <a href="http://www.providentcu.org">www.providentcu.org</a>            All LSI members are eligible to join.</p>
<p><b>HERTZ CORPORATION</b>            Effective Date: June 1, 1996            CDP Card #447698            (800) 654-3131  <a href="http://www.hertz.com">www.hertz.com</a></p>	<p><b>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 working or living in L.A. County, or referrals from existing member.</p>
<p><b>LEGACY WEALTH MANAGEMENT</b>  <b>Daniel R. Henderson, MBA, CFP</b>            3478 Buskirk Avenue, Suite 300            Pleasant Hill, CA 94523            Office: (925) 296-2853 or (877) 679-9784            Fax: (925) 944-5675            E-mail: <a href="mailto:daniel@legacywealthmanagement.biz">daniel@legacywealthmanagement.biz</a>  <a href="http://www.legacywealthmanagement.biz">www.legacywealthmanagement.biz</a>            Discounted John Hancock Long Term Car/Life Insurance, Annuities, Retirement, Investment &amp; Estate Planning, Mutual Funds, &amp; 401K</p>	<p><b>CAPITAL INVESTMENT ADVISERS</b>  <b>Emerson J. Fersch, CFP, ChFC, CLU, CASL</b>            5000 E. Spring Street, Suite 200            Long Beach, CA 90815            Office: (562) 420-9009 or (877) 270-9342            Fax: (562) 420-9955  <a href="http://www.ciadvisers.com">www.ciadvisers.com</a>            Retirement Planning/Investment Management, Pension and 401K Rollover Consulting, Comprehensive Financial Planning</p>
<p><b>DAVID WHITE &amp; ASSOCIATES</b>  <b>Wealth Accumulation and Preservation</b>            3150 Crow Canyon Place, Suite 2000            San Ramon, CA 94583            (800) 548-2671            Contact: Ryan Gonzales (ext. 2682), <a href="mailto:rgonzales@dwassociates.com">rgonzales@dwassociates.com</a>, or Matt Kay (ext. 2628), <a href="mailto:mikay@dwassociates.com">mikay@dwassociates.com</a>            Investments, Retirement Plans, Education Savings Accounts, Medical/Life/Disability/Long Term Care Insurance</p>	<p><b>ATHLETES BUSINESS CONSULTANTS</b>  <b>Jory Wolf, President/Founder</b>            350 10<sup>TH</sup> Avenue, Suite 1000            San Diego, CA 92101            Office: (858)886-9842            Cell: (510)919-9062  <a href="http://jory@athletesbiz.com">jory@athletesbiz.com</a>            California Insurance License: 0E88330            Discount on Long Term Care/Life/ Disability Insurance, commercial and residential lending.</p>

Revised 04/2020



# SFLPA & LPI EVENTS CALENDAR

## Educational & Networking Opportunities

### October

10/15 - 5:30 pm SFLPA Membership Meeting  
10/15 - 12:00 pm (LPI) Microsoft Office  
10/16 - 12:00 pm (LPI) Table of Contents  
10/17 - 12:00 pm (LPI) Calendaring Pitfalls  
10/22 - 12:00 pm (LPI) Ethics & Trust Accounts  
10/24 - 12:00 pm (LPI) Summer Ct. Series:  
Bankruptcy

10/28 - 12:00 pm (LPI) Trial Binders  
10/29 - 12:00 pm (LPI) Excel Everyday Uses  
10/30 - 12:00 pm (LPI) Motion to Compel Discovery

Don't forget the CCLS Online Class every Sunday at 7 pm!

### November

11/05 - 12:00 pm (LPI) Corporate Law, Part 1  
11/05 - 6 weeks (LPI) Overview of CA Discovery  
11/05 - 8 weeks (LPI) Beginning Legal Secretary  
11/07 - 6:00 pm SFLPA Board Meeting  
11/07 - 12:00 pm (LPI) Building a Retirement Plan  
11/12 - 12:00 pm (LPI) Corporate Law, Part 2  
11/12 - 8 weeks (LPI) Trial Preparation

11/12 - 6 weeks (LPI) Advanced Discovery  
11/12 - 8 weeks (LPI) Appellate Procs., 9th Cir. COA  
11/15-17 - LPI's 2nd Quarterly Conference  
11/18 - 12:00 pm (LPI) Conservatorship  
11/20 - 12:00 pm (LPI) It's All About Subpoenas

Don't forget the CCLS Online Class every Sunday at 7 pm!

### December

12/02 - 6:00 pm SFLPA Board Meeting  
12/03 - 12:00 pm (LPI) Better Sleep, Better You  
12/05 - 12:00 pm (LPI) Saas & eDiscovery  
12/10 - 12:00 pm (LPI) Adobe Forms

12/11 - 12:00 pm (LPI) Preparation, Presentation & Polish  
12/19 - 6:00 pm SFLPA Holiday Party at Patriot House

Don't forget the CCLS Online Class every Sunday at 7 pm!

All SFLPA events are posted on our website. You will also find some of the flyers published in this issue. Please visit us at [www.sflpa.org](http://www.sflpa.org) and click on the Events tab.

We also encourage you to visit LPI's website at [www.legalprofessionalsinc.org](http://www.legalprofessionalsinc.org) to keep up with all the educational webinars, other local association events, and information on upcoming LPI Conferences.



# Change of Address

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

New Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

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

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

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

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

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

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

**Please indicate preferred contact method:**

**Home**

**Work**

**YOUR SPECIALTY:**

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

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

**Please submit to:**

SFLPA Treasurer

E-mail: [sflegalsecretary@gmail.com](mailto:sflegalsecretary@gmail.com)



# San Francisco Legal Professionals Association



## Diversity, Equity + Inclusion Statement

Members of the San Francisco Legal Professionals Association shall respect everyone, and shall not discriminate against anyone on the basis of that person's actual or perceived race, ethnicity, age, gender, religion, sexual orientation, gender identity, gender expression, disability, body size, educational background, nationality, immigration status, economic status and/or other diverse backgrounds.

Members shall contribute to a safe, professional, and collegial environment in SFLPA and LPI. This includes all SFLPA and LPI events, and all situations in which a member interacts or communicates with another member, regardless of whether the interaction occurs at or outside SFLPA or LPI events.

Members understand that people may belong to different communities and backgrounds of which the member is not aware. Members will be mindful of their potential biases, and respectful as they interact with others.

Members understand that disclosure of a person's diverse background can lead to unintended negative consequences. Therefore, members shall exercise utmost discretion in respecting others' privacy when diversity-related information is disclosed to or obtained by a member.

Members are encouraged to examine and take advantage of the privileges they have to support others within our association, their own communities, and beyond.



The SFLPA Leadership Team and Friends



# Diversity, Equity & Inclusion Calendars

By Odaya Buta-Scott, DEI Chair



Dear Members,

We are very excited to share with you our SFLPA Diversity, Equity and Inclusion (DEI) calendars. We made every effort to include many of the important dates, awareness days, and months of all groups. If we missed any important dates, please reach out to us. Please let us know what we missed, so we can make sure we include it in the future. Please email us at: [editor@sflpa.org](mailto:editor@sflpa.org). Thank you and Happy Celebrating!



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	Mahalaya Amavasya	World Mental Health Day	1	5
6	7	8	9	World Mental Health Day	Yom Kippur	12
15	14	15	Sukkot Sharad Purnima The Night of Radha & Krishna Birth	INTERNATIONAL DAY FOR THE ERADICATION OF POVERTY 17 OCTOBER	18	19
20	21	22	25	Simehat Torah	25	26
27	28	29	30			



# Diversity, Equity & Inclusion Calendars

(Cont.)



# November 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
5	6	7	8	9		
10		12				
17	18	19		21	22	25
		26	27		29	30

# December 2021

DEI CALENDAR

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			4		6	7
8	9		11	12	15	14
15			17	18	19	20
22	25				27	28
29	30					





# Diversity, Equity & Inclusion Calendars

(Cont.)



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			Happy New Year 2025	2	3	4
5	6 Día De Los Reyes Magos	7	8	9	10	11 Human Trafficking Awareness Day
12	13	14 MAKAR SANKRANTI	15	16	17	18
19	20 Luther King Day	21	22	23	24	25
26 HOLOCAUST REMEMBRANCE DAY	27 DATA PRIVACY DAY	28	29 Chinese New Year	30	31	



# BARKLEY

▲ Court Reporters

A MAGNA LEGAL SERVICES COMPANY >



## Jury Consulting

- Jury Research
- Case Risk/Damages Assessment
- Focus Groups & Mock Trials
- Online Jury Research with JuryConfirm
- Jury Selection/Voir Dire
- Witness Preparation
- Shadow Juries
- Change of Venue Studies



## Graphics Consulting

- Strategic Visual Communication
- Technical Tutorials
- 2D/3D Animations & Recreations
- Presentation Design & Production
- Interactive Timelines



## Trial Presentation

- Document/ Deposition Management
- Courtroom/ War Room Setup
- Courtroom Presentation
- Trial Technology



## Social Media Surveillance

- Jurors, Plaintiffs & Experts



## Process Service

- Nationwide Coverage
- Comprehensive Proof of Service
- Rush Requests
- Skip Tracing



## Virtual Proceedings

- Virtual Court Reporters & Interpreters
- Monitoring & Instant Tech Support
- Exhibit Management & Annotations
- Break-Out Rooms



## Court Reporting

- AI Deposition Summaries
- Nationwide Coverage
- Experienced & Reliable Reporters
- 24-Hr Scheduling
- Easy-to-Use Online Office
- Real-Time Reporting
- Corporate Account Management



## Record Retrieval

- Secure, Easy-to-Use Records Portal
- Real-Time Order Tracking
- OCR & Bates Stamping
- Subpoena Preparation & Services
- Nurse Review
- HyperNav Records Navigator



## Language Services

- On-Site Interpreting
- Document Translation
- Over-the-Phone Interpreting



## Video Services

- Certified Legal Videography
- Video Editing & Conversion
- Courtroom Playback



## Investigative Services

- Asset Investigation
- Medical Canvassing
- Surveillance/Sub Rosa
- Social Media Investigation

To learn more, contact  
**Kristen Craig-Reed**



KristenC@MagnaLS.com | 415.972.9160  
[www.Barkley.com](http://www.Barkley.com)



# Message From The Editor

Jessica Landers



I hope you all found this issue as informative and entertaining as I did! I would like to thank the rest of the *Hearsay* committee for making the transition to editor as seamless as they did. Fall is my favorite season, so it's only fitting that it would be my first issue as editor.

To introduce myself a little, I began my legal career in San Diego in 2007, working at an immigration firm, before transitioning to litigation in 2011. I relocated to San Francisco in 2021 to be closer to family and join my current firm, where I support a mix of commercial and intellectual property litigators. My favorite thing about litigation is that there's always something new to learn. In my personal life, I enjoy reading, spending time with my husband and friends, cooking, and taking aimless walks around the city. I'm on a mission to try everyone's favorite pain au chocolat in the city, so please send me your favorite to add to my list!

One of the reasons I joined the SFLPA was to meet new peers after relocating. It has been great for that, as well as for keeping up with the changes in laws and procedures. All of us in litigation will be getting used to the new summary judgment deadlines, and a membership to SFLPA gives us a headstart on that, as well as other changes. I look forward to getting to know more of you, whether it's at one of our membership meetings, a brown bag event, or one of our social events. Thank you for reading this issue of the *Hearsay*.



# LPI 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.

