



ACCESS

A Publication of the
California Association of Legal Document Assistants
www.calda.org



January 15, 2004

PRESIDENT'S MESSAGE

I know that CALDA has been growing and we now have several new members, which I would like to welcome to our organization. I believe you will find that CALDA will extremely improve our professional and personal lives.

The purpose of CALDA is the promotion of high standards of Legal Document Assistants in California and provides a forum and opportunities for professional development, skill development and training.

There are many benefits CALDA has to offer and one being, the TALKLIST. The TALKLIST was created to enhance the professional life of the member and to provide easy access to quick answers. But, we also understood that in having this kind of forum there would have to be a policy. Therefore, I would like to outline the policies that are in place regarding the TALKLIST.

1. You must be a voting or sustaining member of CALDA, to benefit from the TALKLIST
2. You must keep the Administrator of the TALKLIST informed of your correct e-mail address.
3. If the Administrator receives bounced mail three times, you will be taken off the list, until a correct e-mail address is given.
4. The TALKLIST is only for CALDA, LDA, and UDA topics.
5. If a member violates the use of the TALKLIST, then that person will receive a verbal warning. Second violation, a written warning. Third violation and continues to violate the use, then that member will be taken off the TALKLIST for a period of time to be determined by the President and Administrator or permanently depending on the severity of the violation.

6. Violating the TALKLIST shall mean using the TALKLIST for other reasons that are not related to or the subject of CALDA, LDA, and UDA topics.

7. E-mails must be signed by the sender.

Please remember this policy is for the benefit of CALDA members and not to discourage the use of the TALKLIST, but to improve the purpose and quality of the TALKLIST.

Now, on to what your Board has been doing for you, Jeri Blatt, Vice President has been working very hard on gathering LDA information and putting that information into an area format, so that anyone who is interested in forming a chapter in their area will be able to do so easily. If you have any questions, please contact Jeri at 650-574-2087.

I know that everyone has been waiting for the CD's to come out and Cara Gould, Secretary and Stephen Elias, Attorney at Law, have been working hard to have the CD's ready and accurate for you. I hope all of you have had the chance to read my postings on the TALKLIST regarding the delays and will be understanding. The CD's will be coming to you soon. Also, Robin Wilson, Education Chair now has the Annual Conference tapes ready for purchase.

I encourage all members to get involved and give some of their time to a committee they are interested in. We have many projects throughout the year that could use your help. You can offer to help by contacting any one of the board members who are the chairs of their committees. Please get involved. After all, it's all about you!

**Best Regards,
Anita D. Parga
President**

CALDA OFFICERS 2004

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Immediate Past President
& Executive Adviser

ATTENTION All Board Members

ALL MEMBERS: EACH YEAR YOU MUST SUBMIT A COPY OF LDA, UD OR IMMIGRATION REGISTRATION; OR A LETTER FROM YOU STATING UNDER PENALTY OF PERJURY THAT YOU AREN'T REQUIRED TO CONFORM TO STATE LAW. EVERYONE MUST COMPLETE ALL 4 PAGES OF APPLICATION

Special Offer

CALDA offers instant messages to all voting and non-voting members. If you want to be a part of the TALKLIST and have an E-mail address (or if your address has changed), please send it to
dpwade@lightspeed.net

WHEN AN LDA ASKS "WHY SHOULD I JOIN CALDA?"

Tell them, the benefits are:

1. Increased professional knowledge and networking opportunities.
2. Awareness of events and developments pertaining to the LDA profession.
3. Subscription to the newsletter, *ACCESS*.
4. A voice in decisions affecting the profession at the local, state and national levels.
5. Discounts on educational seminars and workshops.
6. Setting a higher standard of professionalism.

The ACCESS is a publication of the California Association of Legal Document Assistants (CALDA)

The opinions expressed in ACCESS are those of the writers and are not necessarily those of CALDA. All articles are based solely on materials submitted in writing. The act of submitting editorial contributions shall constitute an express warranty by the contributor that the material is original and in no way an infringement upon the rights of others. CALDA assumes no responsibility for verification of the information submitted.

NEWSLETTER GUIDELINES

Materials may be submitted as follows: E-Mailed, 3.5 Diskette
E-Mail china@longscourtforms.com or mail to:

China Long
27780 Jefferson Ave. Suite M
Temecula, Ca. 92590
Fax: 909-694-4460

If sending on diskette: Contents should be in final form. Computer System used PC only, Software used, MS Word or Word Perfect 9 or lower ONLY.

**Do not indent or use all caps in headlines or text.
Prefer alignment to be justified**

Treasurer's Report

By Cindy Elwell, CALDA Treasurer

Listed below is our Profit and Loss Report Compared to Budget through December 31, 2003. As you can see, we are considerably below budget (\$13,243), due to underbudgeted conference costs, dues and the website. However, even though we underbudgeted, to date, we had a profit on the conference of about \$4,600. This is still news, as we have lost at least a couple of thousand dollars on each of our last conferences.

The other big difference in our budget has to do with the Membership Committee, as we are now paying our administrator a monthly fee to process our memberships, and this was not budgeted for. We also did not budget for the public relations plan. However, we have a profit to date of \$6,061 (we're not supposed to use the word profit in our nonprofit world, but, I think, you all know what I mean as opposed to an excess over deficit of \$8,616). So that is really good news. In the past couple of years, we have been operating at almost breakeven.

CALDA Profit and Loss Budget vs. Actual April through December 2003

	<u>Apr - Dec 03</u>	<u>Budget</u>	<u>\$ Over Budget</u>	<u>% of Budget</u>
Income				
Annual Conf. Income	22,955.04	25,400.00	-2,444.96	90.37%
Dues	10,060.00	11,510.00	-1,450.00	87.4%
Education Products	336.00			
Fundraising Products	4,404.42	2,750.00	1,654.42	160.16%
Interest Inc	44.06	45.00	-0.94	97.91%
Newsletter	0.00	40.00	-40.00	0.0%
Workshops	94.17	900.00	-805.83	10.46%
Total Income	<u>37,893.69</u>	<u>40,645.00</u>	<u>-2,751.31</u>	<u>93.23%</u>
Expense				
Administrative Assistant	1,564.12	900.00	664.12	173.79%
Annual Conf. Exp.	20,330.17	13,190.00	7,140.17	154.13%
Bank Charge	742.42	639.00	103.42	116.19%
Board Meetings	892.64	753.00	139.64	118.54%
Fund Raising Committee	471.73	747.00	-275.27	63.15%
Legal & Accounting	203.56	525.00	-321.44	38.77%
MCLE	0.00	100.00	-100.00	0.0%
Membership Committee	0.00	315.00	-315.00	0.0%
Newsletter Expense	500.00	616.00	-116.00	81.17%
Office Expense's	564.55	180.00	384.55	313.64%
Post Office	348.42	220.00	128.42	158.37%
Prepare Taxes 2001	0.00	300.00	-300.00	0.0%
Professional Standards	407.81			
Public Relations	800.00			
St. Bd. of Equalization	26.00			
Taxes	0.00	300.00	-300.00	0.0%
Telephone	89.69	306.00	-216.31	29.31%
Website	4,232.60	1,800.00	2,432.60	235.14%
Workshop	846.20	450.00	396.20	188.04%
Total Expense	<u>32,019.91</u>	<u>21,341.00</u>	<u>10,678.91</u>	<u>150.04%</u>
Net Income	<u><u>5,873.78</u></u>	<u><u>19,304.00</u></u>	<u><u>-13,430.22</u></u>	<u><u>30.43%</u></u>

Detailed below is our balance sheet compared to last year. The good news here is that we've increased our assets \$5,525 compared to last year, so it shows that we are certainly doing the right things. I think we now need to concentrate on increasing our membership, expanding our products and services to members and putting on a great conference next year. So please help the board meet its objectives and provide you with the services you want.

Balance Sheet Previous Year Comparison As of December 31, 2003

	Dec 31, 03	Dec 31, 02	\$ Change	% Change
ASSETS				
Current Assets				
Checking/Savings				
CALDA Checking	25,872.74	20,335.71	5,537.03	27.23%
CALDA Savings	2,529.26	2,529.26	0.00	0.0%
Total Checking/Savings	28,402.00	22,864.97	5,537.03	24.22%
Accounts Receivable				
Accounts Receivable	-12.50	0.00	-12.50	-100.0%
Total Accounts Receivable	-12.50	0.00	-12.50	-100.0%
Total Current Assets	28,389.50	22,864.97	5,524.53	24.16%
Other Assets				
CALDA Mutal Fund	3,379.47	3,379.47	0.00	0.0%
Total Other Assets	3,379.47	3,379.47	0.00	0.0%
TOTAL ASSETS	31,768.97	26,244.44	5,524.53	21.05%
LIABILITIES & EQUITY				
Liabilities				
Current Liabilities				
Other Current Liabilities				
Sales Tax Payable	211.39	197.00	14.39	7.31%
Total Other Current Liabilities	211.39	197.00	14.39	7.31%
Total Current Liabilities	211.39	197.00	14.39	7.31%
Total Liabilities	211.39	197.00	14.39	7.31%
Equity				
Opening Bal Equity	24,081.50	23,619.02	462.48	1.96%
Retained Earnings	1,602.30	5.97	1,596.33	26,739.2%
Net Income	5,873.78	2,422.45	3,451.33	142.47%
Total Equity	31,557.58	26,047.44	5,510.14	21.15%
TOTAL LIABILITIES & EQUITY	31,768.97	26,244.44	5,524.53	21.05%





WELCOME NEW CALDA MEMBERS

By Robin Schumacher
CALDA Membership Chairperson

- | | |
|-----------------------------------|-----------------------|
| Terri Austin | Monterey County |
| Brenda Rozynek | San Diego County |
| Sharen Goodwin | El Dorado County |
| Mickey Fernandez | Sonoma County |
| Terry Williams | Solano County |
| Michael McMillin | Sacramento County |
| Robert Standish | Santa Clara County |
| Karen Kirkman | San Bernardino County |
| Pamela Paige | Alameda County |
| Mary Contreras | Riverside County |
| Linda Cordero | Humboldt County |
| Ivette Perez | Los Angeles, CA * |
| Ruth Moller | Gendora, CA ** |
| Donald Yost | Los Angeles |
| Renne Loueiro | Stanislaus County |
| Ruth Ellis | Riverside County |
| Jacqueline Marazzi | Escondido, CA * |
| Bruce Bowman | Oakland, CA |
| Angela Cady | Orange County |
| Martin Dean, Essential Publishers | San Francisco, CA ** |
| Soraya Wannasooopon | Riverside County |
| Connie Crockett | Nevada County |
| Matthew Badsci | Bakersfield, CA * |
| Frank Polizzi | Los Angeles County |
| Denise Nobles | Lassen County |

* Services performed do not require LDA registration
** Sustaining Member

Winning Big?

One California women learned the hard way how seriously judges take the duty to disclose assets to the other party. In 1996, Denise Rossi won \$1.3 million lottery jackpot and 11 days later filed

for divorce from her husband of 25 years. She kept her lottery winnings secret from her husband during the divorce proceedings. Two years later, he inadvertently learned of her windfall when he received a misdirected piece of mail. In November, 1999, a Superior Court Judge ordered that the entire jackpot be given to the husband after determining that the wife violated state disclosure laws and had acted out of malice or fraud. The wife is planning to appeal, and news reports indicate that she filed for bankruptcy in early 2000.

Professional Standards Committee

Since our annual Conference, several people have sent me copies of their Yellow Page ads from their area indicating other LDA's are still advertising under the "paralegal" heading and/or calling themselves "paralegals" in the body of their ad or in the name of their business. As you all know, we are Legal Document Assistants and **must not advertise** under the "paralegal" heading or use the word "paralegal" in any of our advertising. The Department of Justice recently sent out letters to anyone advertising under the "paralegal" heading advising them of this law. This Professional Standards Chairman will also send a letter to offending individuals who advertise under the heading "paralegal". To obtain a list of names, I'm asking each of you to send me a copy of the Yellow Page ads from your area, especially under the "paralegal" heading. I will be sending them a copy of the law, as well as information about CALDA, with a copy to their County District Attorney's Office.

What do we do about those people in our area who prepare paperwork for the public, but are not registered or bonded LDA's? We are all aware of someone in our areas who perform the duties of LDA's, but either can't qualify to register, can't afford to register, or simply don't choose to register. **It is the law!** You must be registered and bonded in order to prepare paperwork for the public unless you work directly under the supervision of an attorney. If you are aware of someone in your area who falls into this category, please send me their business card, or their flyer, or simply their name, business name, and address. I'll send them a copy of the law, information about CALDA, with a copy to their County District Attorney's Office.

As members of CALDA, we all try so very hard to follow the rules. It is truly unfair that some people try to skirt the law. It is my belief that now that the Department of Justice seems to be taking an interest in enforcing the law, things may change. Let me know what you think by fax, mail or phone.

Marcia Burke

Professional Standards Chairman
39159 Paseo Padre Parkway, #110
Fremont, CA 94538
Phone: 510-791-2700
Fax : 510-791-2798



Hello Calda members -

As your 2004 Conference Chair, I look forward to another informative few days at Asilomar later this year, and I hope to see all of you there. Last year was our first at Asilomar, and I think things will be easier and better every year we conference there. Plus, it's always fun to see the faces that go with the names on the Calda TALKLIST.

I know we can all learn from the various classes taught at the Conference. I hope Commissioner Vogl can give another class in

Family Law and tell us more jokes and witty stories. No matter how long some of us have been in this business, there is always something new to learn, and the Conference is the perfect place to find out about the new forms and procedures. It's also a good place to learn how other members of Calda have handled some of the problems that we all face – nice to know we aren't the only ones getting perfectly good paperwork rejected!

I look forward to seeing old friends and making new ones. The Conference is a



great place to network, swap horror stories and learn new tricks to make our lives easier.

Richard set this Daniel Ballard straight and made me and other LDA's very grateful. Thanks again, Richard.

I am the Conference Chair for 2004 and as such, would welcome any ideas, comments, any suggestions for next year's conference. My e-address is [Hinda @mindspring.com](mailto:Hinda@mindspring.com).

Hinda Lucas

Planning for Your Retirement

Chances are you should now be planning for your own retirement. Here's why and what you will need to do:

Americans are living longer. You should plan for an income stream through at least age 90.

The responsibility for providing retirement income is being shifted slowly but surely by employers onto the shoulders of employees. Take advantage of any and all retirement plans available to you now through your employer. At a minimum, contribute the maximum amount necessary to obtain any matching amount from your employer. Once your credit cards are paid off, contribute more - the maximum allowed if possible.

You have more investment choices now than ever before in 401(k) plans and self-directed plans. Learn what you need to know about available mutual funds, as well as their objectives and performance, so you

can make intelligent decisions.

If you are not part of the “triple squeeze” generation-supporting an aging parent, putting a child through college and trying to save for your own retirement simultaneously-you may be soon. Be sure to consider these factors as you make your decisions about splitting retirement plans in divorce.

China

Are You Aware Of A New California Law

Assembly Bill No 2246 Chapter 1039

An act to add Title 1.81 (commencing with Section 1798.80) to part 4 of Division 3 of the Civil Code.

(Approved by Governor September 30, 2000. Filed with CA Secretary of State September 20, 2000)

The People of the state of California do enact as follows:

SECTION 1. Title 1.81 (commencing with Section 1798.801) is added to part 4 of Division 3 of the Civil Code, to read Title 1.81 Customer Records

1798.80 The Following definitions apply to this title:

(a) “Business” means a sole proprietorship, partnership corporation, association, or other group, however, organized and whether or not organized to operate at a profit, including a financial institution organized, chartered, or holding a license or authorization certificate under the law of this state, any other state, the United States, or any other country, or the parent or subsidiary of a financial institution. The term includes an entity that destroys records.

(b) “Records” means any material regardless of the physical form, or which information is recorded or preserved by any means, including in written or spoken words, graphically depicted, printed, or electromagnetically transmitted. “Records” does not include publicly available

directories containing information individuals voluntarily consented to have publicly disseminated or listed, such as name, address or telephone number.

(c) “Customer” means an individual who provides personal information to a business for the purpose of purchasing or leasing a product or obtaining a service from the business.

(d) “Individual” means a natural person

(e) “Personal Information” means any information that identifies, relates to, describes, or is capable of being associated with, a particular individual, including, but not limited to, his or her name, signature, social security number, physical characteristics, or description, address, telephone number, passport number, driver’s license or state identification card number, insurance policy number, education, employment, employment, employment history, bank account number, credit card number, or any other financial information.

1798.81 A Business shall take all reasonable steps to destroy, or arrange for the destruction of a customer’s records within its custody or control containing personal information which is no longer to be retained by the business by (1) shredding, (2) erasing, or (3) otherwise modifying the personal information in those records to make it unreadable or undecipherable through any means.

1798.82

(a) Any customer injured by a violation of this title may institute a civil action to

recover damages.

(b) Any business that violates, proposes to violate, or has violated this title may be enjoined.

(c) The rights and remedies available under this section are cumulative to each other and to any other rights and remedies available under law.

Thank you Janet Greenhow for bringing this law to our attention

PUBLIC RELATIONS

After two and a half months as Public Relations Chair, the fog is beginning to lift and I am now able to think seriously about what a public relations person is supposed to do – other than dig for material to prepare press releases.

The first thing I've learned is that "thinking seriously" about public relations doesn't necessarily translate into understanding. So, for starters, I consulted Webster's dictionary, which revealed to me that public relations is "the business of inducing the public to have understanding for and goodwill toward a person, firm, or institution."

So what do public relations strategies have to do with CALDA? As small business owners, Legal Document Assistants provide a service that the public needs and wants. It follows, then, that we should employ effective public relations strategies to ensure the public understands the value of the services we offer.

As Anita Parga reported initially in the July 15, 2003 issue of ACCESS, Karen Graff,

vice president of Personalized Info-Media, has offered to develop a public relations packet for CALDA members at a discounted rate. For those of you who attended our conference at Asilomar, you will recall that Ms. Graff was our keynote speaker. Her topic: "Public Relations – the Critical Ingredient for Business Success."

Recently, I contacted Ms. Graff and requested some additional information about the public relations packet. Stay tuned. I'll be getting back to you with the specifics of Ms. Graff's proposal.

Al McLeod
Public Relations
almcleod@speakeasy.net

CORRECTION

In the November 15, 2003 issue of ACCESS, I erroneously reported Robin Wilson was "returning" as Education Chair. She did not. She is a new director. I apologize for the error.

Al McLeod
Public Relations

Family Support

Sometimes, alimony and child support are combined into one monthly payment called family support. Family support is child support not specified as such. Therefore, it is fully taxable to the recipient and tax deductible to the payer.

Recipients enjoy one advantage if a payer defaults. In that situation, the recipient has numerous child support collection

techniques available. If the payer defaults on alimony payments, the only collection method in most states involves taking the payer to court. Be warned, however, that a growing number of courts are disallowing family support, not wanting to burden the child support collection bureaus with collecting what is really alimony.

In mediation, a neutral third party, i.e. mediator or two co-mediators, assists the disputing parties in finding their own mutually acceptable solution to the dispute. The parties agree to negotiated terms, if they can, making all of the decisions themselves. Mediation, like negotiation, seeks solutions whereby both sides "win" in the agreement. This could be said to empower the disputants because, unlike going to a judge, it places the responsibility for problem-solving and decision-making in their hands.

Agreements made during mediation cannot entirely replace the formal divorce decree handed down by a judge -- because they cannot give a divorce -- but they can determine what the decree will say about property, debts, support and custody. Nor can a

MEDIATION



intermediary who is a committed advocate.

mediator entirely take the place of an attorney.

Mediation and legal representation are two separate roles; your lawyer cannot be your mediator due to the conflict of interests that such dual representation would create. Agreements made in a mediation session and written by the mediator must be reviewed by two different lawyers consulted separately by you and your spouse.

Even when ordered by the court, mediation is a voluntary process. As in negotiation, neither party can be forced to come to an agreement or to keep negotiating. Often it is beneficial that each party is forced to take a role in the dispute resolution rather than hiding behind an

The Role of the Mediator

The mediator helps the parties in defining the issues at hand, gives them basic information about the legal system they are involved in, helps them discuss their issues in an orderly and self-disciplined manner, and encourages them to evaluate how proposed solutions would work. Mediators do not serve as advocates for either side of the dispute, nor do mediators provide legal advice. Also, the mediator is not the decision-maker. Instead,

mediators facilitate orderly, purposeful and organized communication between the disputing parties.

The mediator is not a judge, financial counselor, therapist, or friend. Rather, the mediator's task is a specific one: to help the two parties come to a mutually acceptable agreement if possible.



The mediator's main tasks are to:

- Organize the process and clarify the rules
- Facilitate effective communication
- Assist in defining relevant issues and priorities
- Guide exploration of consequences
- Record agreements in a provisional writing, pending full legal advice

A mediator cannot:

- Provide legal advice
- Provide counseling, therapy, etc.
- Impose a decision on the conflicting parties. That's known as "arbitration".

Advantages of Mediation (when done right):

- Convenient
- Voluntary
- Confidential
- Helps power to be balanced and shared
- Quick, compared to litigation
- Often cost effective
- Can restore/improve existing relationships
- Parties have control of and responsibility for the outcome, unlike in court

Mediation Should Not Be Used In All Situations

Despite the fact that many cases are settled effectively through mediation, certain situations exist in which mediation would only further existing conflicts or create new ones. Such situations exist when:

- One party uses violence or physical intimidation techniques against the other
- Parties continue to withhold important information that affects what they're negotiating about
- Either party is unwilling to disclose his or her basic goals in the negotiation
- Drug or alcohol impairment or mental illness impedes a full understanding of the issues by either side
- Either party is unable to assert his or her basic needs or concerns because of fear, habits of deference, or some other impediment.

Using a Mediator As Part of Your Divorce Process:

Your attorney can help you arrange the services of a mediator. Mediation, however, is a type of dispute resolution that will take not only the services of a mediator but also the full and cooperative participation of all sides of the dispute

Sandra M. McCarthy
Fundraising Chair

As many of you know, I have recently returned from my extended vacation to Thailand, Cambodia and Laos for the months of November and December. Many thanks to those board members and other individuals who assisted in the processing of product purchases during my absence. It has been quite an adjustment getting back to reality after such a long and relaxing reprieve from work and daily life but I am slowly getting back into the saddle!

When I came to the CALDA conference, I had no idea that I would leave as your CALDA fundraising chairperson. I am eager and excited about the opportunities to develop and broaden this segment of CALDA. As your fundraising chairperson, I will be diligently seeking other products that can not only enhance our respective businesses, but also serve as effective tools for those individuals seeking new ways of exposure and marketing.

2004 is going to be an exciting year for CALDA members. As everyone knows, the biggest project in the works has been the revamping of the CALDA brochures and questionnaires which, if you didn't pre-purchase them at the conference, will be available for purchase by CALDA members for \$75.00 per disk plus tax. These materials reflect both CALDA as an organization and you as an LDA to consumers and your surrounding legal community. Many individuals have inquired about when the new brochures and questionnaires will be available. The project has been a lengthy and tedious task, particularly in view of the many recent form changes. I am pleased to report that the final products are in the process of obtaining the attorney's "stamp of approval" and should be ready for shipment by the end of this month or early February. I would encourage all members to purchase both disks

as they will be invaluable tools for each of us in making sure that we clearly stay within the guidelines for LDA's, particularly with regards to inadvertently crossing over the line and performing acts which may be construed as UPL. The brochures will provide clear instructions to your customers as to which forms they will need for routine matters to comply with B & P 6411(e). The questionnaires will allow you to gather all of the appropriate information necessary to create those forms and enable you to retain the customer's data in their own handwriting. [See B & P 6400(d)].

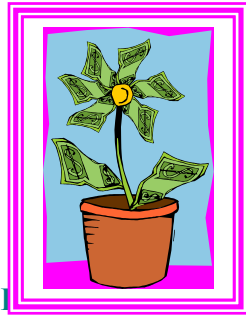
We have already made some important changes to facilitate members ordering products through our website by now offering both online credit card and online check processing when purchasing products so that you no longer have to mail in your orders. We have also made many of our products available via download. Previously product shipments to CALDA members were delayed pending payment clearing and manual shipping. We are now trying to provide CALDA members with their product purchases as expeditiously as possible. In lieu of delaying product purchases pending payment clearing, I am recommending CALDA members be allowed the option to download their purchases through the CALDA member area. Member usage of this system would be with the understanding that any product payments which are dishonored (i.e., NSF or credit card rejections) would result in the temporary suspension of that member's CALDA benefits. Once satisfactory payment and any appropriate service has been remitted to cover CALDA member's dishonored payment, membership benefits would be restored. This issue will be addressed in the upcoming Board meeting and CALDA members will be notified of its decision.

The conference was a tremendous success, not only in offering a multitude of venues for continuing education, but to provide a fun environment for meeting other members, sharing successes, war stories and other ideas. For those who were unavailable to attend the conference, the seminar material handbook can be purchased for \$75, individual class tapes for \$15.00. Conference materials can be ordered through the web site.

Finally, at the request of many members, we have translated the required LDA contract into Spanish. The contract can be purchased from our website for \$20.00 as a downloadable product.

I have many other ideas that I will be exploring in the upcoming year so stay tuned for more exciting news in the months to come.

Sandy McCarthy
Fundraising Chair



LEGISLATIVE CHAIR By Peter Kroeber

On July 19, 2003, I was elected as the Legislative Chair of the CALDA BOARD. I am committed to carrying on with the work already established by the former Legislative Chair, Debbie Driver. Ms. Driver had been tracking Assembly Bill 69, which proposes changes to the “Unfair Competition Law.” This bill was prompted by a complaint filed by the California Attorney General under the Unfair Competition Act (UCA). The cause of this complaint is related to lawsuits directed at small businesses to obtain nuisance settlements. AB 69 was designed to “impose specified requirements on an unfair competition action brought on or after January 1, 2004, by a private person acting for the interests of the general public, which the bill would designate as a representative cause of action.” (An act to add Chapter 6 (commencing with Section 17300) to Part 2 of Division 7 of the Business and Professions Code, relating to business. An act to amend section 14672.100 of the Government Code, relating to public works).

Per my conversation with a representative from Assemblyman Correra’s office and my general reading of these bills, the current status is bleak. The “Business and Unfair Competition” portion of the bill has been completed “gutted,” and the bill was passed as a “public works” amendment. There is some discussion about resubmitting a

revised version of this bill to again be considered by the Assembly, but no one is currently working on this. The representative in Assemblyman Correra’s office called this bill “controversial.”

I shall bring this up for discussion at the upcoming board meeting on January 24, 2004.

Davidson Staffing Lunchtime Classes:

MS Word Tips and Tricks

Designed specifically for legal support professionals by a legal professional, their lunchtime classes cover different topics each month and are offered in Davidson Legal Staffing's Orange County, Los Angeles, San Diego, and San Francisco office locations. The cost is \$15.00 and includes lunch.

Their 2004 topics will include Microsoft Word - Table of Authorities, Modifying Styles, and more, Microsoft Excel, Microsoft Outlook, Microsoft PowerPoint, Microsoft Access and Summation.

If you’d like to learn some new MS Word Tips and Tricks to save you time and frustration, sign up or for more information on their upcoming MS Word 2000 Tips and Tricks lunchtime training sessions, send an email to Diana Baker at dbaker@dpijobs.com.

Visit their website at <http://www.calawjobs.com/legal-training/ms-word-tips-tricks.htm> for specific class locations, dates, times and topics.

Bay Area Legal Secretaries Forum

Their next **Quarterly Workshop** is their Annual Changes in the Law, presented by Alameda County LSA, and will be held as follows:

Where: Concord Hilton, 1970 Diamond Boulevard, Concord, California, (925) 827-2000

When: Saturday, January 24, 2004. Registration is at 8:30 a.m., workshop is 9:00 a.m. to 4:00 p.m.

Registration: \$125 if received on or before January 14, 2004, or \$145 after January 15, 2004; the last day to register is January 19, 2004. Registration fees include program materials and lunch. If you make a reservation and cannot attend, you must cancel in writing at least three days in advance of the program in order to receive a refund (less a \$10 service charge).

To mail in your registration, or for a complete brochure, visit their website at www.balsf.org, and print out a brochure. They are an MCLE provider and all programs qualify in an approximate amount of 5.0 hours of credit. Speakers will include Heather Anderson, Esq., Bonnie Hough, Esq., and Patrick O'Donnell, of the Administrative Office of the Courts, and Naomi S. Comfort, Esq., Law Offices of Naomi S. Comfort, Probate, Estate Planning, Tax.

Annual Seminar - In 2004, they will be presenting only one Annual Seminar, on March 27, 2004, at the Concord Hilton in Concord, California. Topics will include estate planning/probate; patent prosecution; beginning civil litigation; calendaring; E-Filing; family law, and much more. Check their website for details as they become available.

CALDA WORKSHOPS – UPCOMING

Watch the CALDA TALKLIST for the upcoming workshop in Los Angeles being planned by CALDA member Victoria Orellana.

The Bay Area CALDA chapter plans to have Mike Bailey, a Family Law attorney, give a class on Family Law at February's meeting. Suggestions for topics are child custody, support and unbundling. Watch the CALDA Talklist for more information. Meetings are open to members and non-members.

CALDA TAPES

Tapes from our Conference at Asilomar are available on our website for purchase, and don't forget – they qualify for CALDA continuing education credit!