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CALDA

CALIFORNIA ASSOCIATION OF LEGAL DOCUMENT ASSISTANTS

Setting the standard...education, ethics, excellence

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March 2007 — A Word From Our President

Time is certainly flying by and it is hard to believe that 5 months has passed since our conference. I have many things to bring you all up to date about.

We had a really productive board meeting in January. Many exciting issues were decided upon, the most important being the decision to accept a bid submitted by HitNet, Inc. to design our new website. HitNet was founded in 1986 and is based in Aurora, Illinois. By the middle of May we will have a fabulous new look. Michael Brinsley is assisting us with the transfer of information to our new web designer and this assistance is greatly appreciated. We are in a transition phase at the moment and I appreciate that you are all being very patient while we go through this process.

The Board has voted to have our 2007 conference in Sacramento. Moira Boyle and Kat Mountjoy put together a great presentation of the various properties for our January meeting showing several properties together

with pricing on these properties. We will be having our board meeting on April 28, at the Hyatt in Sacramento so that we can visit some of these locations and make a final decision.

On March 10, I was honored to have the opportunity to speak at a workshop put on by the Inland Empire Chapter. This was an extremely successful workshop with classes given by Moira Boyle, Ann Malane, Sherri Quadri. I would like to thank Debbie Jones and Annette Gomez for their continued hard work on CALDA's behalf.

In February I attended a retirement lunch for Sylvia Cherry. Sylvia has sold her business and is moving back to Kentucky. Sylvia has been a member of Calda since 1989, serving on the Board of Directors from 1990 through 1995. She served as Secretary in 1993 and 1994 and was voted in as President for 1995. Sylvia has continued to be a loyal member of CALDA and of our profession. The Board is proud to make her a lifetime member. She is really

an inspiration to all of us and I know that you all join me in wishing Sylvia the very best in her new life.

Another inspirational member is Helen Bellamy. I would like to congratulate Helen Bellamy on her recent success in obtaining her law degree. Helen actually served as Vice President in 1995 and President for 1996 and 1997. She has taught at many of our conferences and in fact was the teacher at the first conference class that I attended. Helen will be sitting the Bar in July and I would like to wish her every success.

I will be giving a workshop at the National Notary Association to be held in Los Angeles in June. They will have a "legal section" which is the category I will be teaching under. The topic will be The Legal Document Assistant. To be able to talk to so many people in one room about our profession is very exciting. I hope I will see some of you there.

Carol Ludlow

Meet Liza Piercy

Meet Liza Piercy – our featured CALDA member for March, 2007. Many of you may already know Liza or may have met her at our conference in Ontario in October 2006 at the registration desk.

Liza graduated with a certificate in Paralegal Studies from UC Riverside in 1993 and has worked for over 25 years as a paralegal in various small and large law firms. Liza formed a corporation, LJP Enterprises Inc. in 2000 and has (cont'd)




Meet Liza Piercy (cont'd)

been an LDA for two years, currently working in Temecula. Her concurrent professions are: Certified Foreclosure Trustee Officer, Certified Notary Signing Agent and Contract Paralegal. Liza joined CALDA in January 2006 and is also affiliated with LETIP, Professional Women's Roundtable, United Trustee's Association and NNA.

Working out of her home as an LDA for the first year, Liza then transitioned to renting professional office space, at the encouragement and invitation of fellow CALDA member, Shawna Velasco, whom she shares the office space with. The moral support, marketing ideas and shared expenses are advantages that she considered and continues to enjoy.

LDA and Contract Paralegal working time is equally split at this time but Liza's future plans are to expand her client base, increase her income and become a full time LDA.

Q. What interests you most about the LDA profession?

A. *I like producing quality work. I enjoy meeting people – the fact that they are my clients is very satisfying, after having worked in a law firm setting for so long – this is very different and rewarding. The aspect of meeting customers on a personal level, which as a paralegal I seldom had an opportunity to do, is interesting. I am very interested in ensuring that this profession grows and that the community at large begins to view the legitimacy of the LDA career.*

Q. What motivates you to work as an LDA?

A. *I believe that this profession will offer the quality of life that I desire. I am hoping that my business will eventually be completely self-sustaining and when the time comes, I will be able to sell the business, providing a secure future for my retirement years.*

Q. What challenges are you looking for in your profession?

A. *I want to expand my current services to include higher valued services and a larger client base. I love preparing foreclosures – it is a very challenging line of work. These documents must be absolutely perfectly done – there is no room for error and I like the challenge and reward these documents require.*

Q. What do you find are the most difficult decisions to make?

A. *Deciding NOT to take a case that seems complicated or risky.*

Q. What is a recent goal you reached and how did you achieve it?

A. *Opening my own office. I was really scared to incur the expense. I talked to several other LDAs at the CALDA conference, who encouraged me with their own stories and tips. So I took the leap of faith – with Shawna's help. Shawna Velasco found the location and asked me to share the space.*

Q. Describe a decision you made that was unpopular and how you handled implementing it.

A. *I have worked for one particular attorney for many years and I had to tell him about going out on my own as an LDA. He has still not fully accepted my decision, felt that I was being disloyal, and has rather dubious thoughts regarding the LDA profession. I continue to work for him on a contract basis and he still wishes I would come back full time, but I am looking forward to full time LDA work in the future.*

Q. Can you tell us a little more about the non-LDA person – Liza?

A. *As the child of missionary parents, I grew up in India, attending boarding schools. It was a great upbringing and I still have many international friends.*

I have two grown daughters, two granddaughters, and my parents who all live nearby. We are a close family and it is such a pleasure to be involved in their lives. I live on a one-acre parcel with LOTS of animals – including chickens, dogs, cats and birds. I like to be outdoors and enjoy running, hiking and softball.

It was my pleasure to interview Liza Piercy and I hope you all enjoy having learned about her as much as I have. All the best to you Liza!!!

Robin Schumacher, CALDA Membership Chairperson

Staying Ahead Through Change


After celebrating CALDA's 20th birthday, we, as an organization now look forward to our future. The essence of life is change. Because of this you have to plan to stay ahead. We plan to look and be more professional. We plan to use professional public relations to accomplish this and to be more visible. That is our goal.

What are your goals as an LDA in the marketplace?

At our October conference Carl Knoll explained in his marketing class that one of things we have to do is adapt to change.

Some recent changes that may have affected you are the new bankruptcy laws, LegalZoom, or the family law courts continued effort to empower the pro pers. Social, economic and political forces affect your business, whether you realize it or not.



Staying Ahead Through Change (cont'd)

If you are serious about your business you must be aware, innovative and proactive in carving out your niche in the marketplace.

The U.S. Census Bureau recently announced that for the first time in our country's history, single households outnumbered married households. The demand for family law services is increasing. The Riverside County Family Law Court is seriously overburdened. Child support payments are being handled differently. An increasing number of Respondents are overseas fighting the war. These divorces will be finalized differently.

What is the status of AB12? If you prepare trusts, and this becomes law, how will you respond?

Competition breeds innovation. Do you know what unbundled legal services are? More LDAs are teaming with attorneys to offer this.

Our chosen profession has seen a lot of positive change. In the last

10 years I have watched a very hostile climate evolve toward a climate of acceptance (I know we have a long way to go) I have also seen the consumer's mistrust of our profession all but disappear.

The best way to stay ahead is to continue your education. That is also CALDA's goal this year, to increase your opportunity to learn. Our education chair, Tina Sandoval, has been consistent in offering you the opportunity to learn with her monthly classes.

Past Board member, Kat Mountjoy distributed a packet of seeds to the conference attendees with a label that said "Grow with CALDA". I hope that everyone in CALDA will take advantage, grow with us and have a prosperous new year.
Annette Gomez

Marketing Tips

Many small businesses begin with some sort of a business plan, albeit a full blown comprehensive plan or something written on a napkin. For a business to grow and develop over time, a marketing plan is often necessary. Daily "operational" functions often overshadow "marketing." What many business people fail to realize as they are pondering why their business is not growing month over month and year over year is that their marketing efforts are either non-existent or substantially inadequate. Here are two helpful "Marketing Tips" to begin growing your successful company:

Marketing Tip 1

Schedule your marketing efforts! Just as you schedule customer appointments, you must schedule time for marketing. Marketing takes shape in many ways, from referrals from past and current customers to a full blown television advertising campaign. Start small, but the "key" is to start actively marketing. One of the first things you can do is follow-up with your past and current customers and ask: a) First, if they were/are happy with your service and find out how to improve; and b) Second, do they have friends or relatives you can help with say your other services...Living Trusts, Wills, Incorporations, etc. Remember, your customers bought from you and are likely pleased with your service for many reasons you may not even realize. Take advantage of those customer relationships; they will be surprised to hear from you and happy to give referrals. Then, follow-up with the prospective customers and remember to thank the referral source so it does not dry up. Once you have mastered this very simple marketing technique, you can move onto other forms of marketing mediums and Public Relations.

**Start small,
but the
"key" is
to start
actively
marketing.**

Marketing Tip 2

**It is paramount to have a
nice balance between
getting traffic and converting
them into customers.**

The "main" goal of marketing is to generate traffic to walk in or call your business. This is often the most difficult aspect for small business owners to understand and capitalize on. Therefore, you may have to seek a professional's help. There are many marketing and advertising agencies that can and will cater to your small business needs; look in the Yellow Pages and set an appointment with one or two of them. One of the key things to remember about marketing is that you can spend hundreds or thousands of dollars getting "traffic" only to fail to "convert" that traffic into paying customers. It is paramount to have a nice balance between getting traffic and converting them into customers. If I had a magic

formula that was 100% guaranteed, I would be a multi-billionaire. Marketing is somewhat of a trial and error, but by failing to market your business will likely not experience the kinds of growth most small business like to see so they can enjoy the fruits of why we became small business owners in the first place...to make money and enjoy more free time! A proper marketing plan and effort will ensure you have a stab at it.
Carl Knoll

She Puts Her Name in the Papers

By DARLA MARTIN TUCKER—DTucker@TheBizPress.com 10:00 PST Sunday, November 5th, 2006

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In 2004, an anxious young husband and father approached Just Document Preparation in Riverside to help him file a domestic violence restraining order against his wife. He wanted to protect himself and his young daughter from his wife's abuse stemming from her refusal to take medication for schizophrenia. Annette Gomez, owner of the firm, interviewed the client. An assistant quickly typed up the court papers, filing them within 24 hours. "He got temporary sole custody of his child," Gomez said.

Gomez is bonded and registered as a legal document assistant in Riverside and San Bernardino counties. For 10 years, she has prepared legal documents for pro per litigants at her Just Document Preparation. Gomez was re-elected secretary of the California Association of Legal Document Assistants during the organization's annual conference Oct. 28-29 at the Doubletree Hotel in Ontario. She is interim president of the association's Inland Empire chapter.

Gomez and two assistants type up court documents for clients who represent themselves in bankruptcies, living trusts, divorces, custody cases, adoptions, name changes, wills and other matters. The clients fill out questionnaires related to the necessary documents and Just Document staff transcribes the information into legal papers. Gomez and her staff are prohibited by law from providing legal advice or opinion, or even from helping clients choose the correct forms needed in their case. "They have to be able to sit down and tell us what they want," she said.



Photo By Dan Elliott

Just Document Preparation owner Annette Gomez works at her office in Riverside. The sign advises customers that she is not an attorney.

From a legal standpoint, Gomez's profession is just six years old.

She has seen the industry mature with the enactment of Senate Bill 1418 in 2000 and a follow-up bill in 2001. The legislation established the "legal document assistants," or LDA, profession in state business codes. It differentiated the job from paralegals who work for attorneys and redefined independent paralegals as legal document assistants. Paralegals are not allowed to dispense legal advice or independently prepare court documents.

The law requires paralegals to hold certificates from paralegal programs approved by the American Bar Association, or a law-related degree from an accredited higher education institution.

Unlike document assistants, paralegals are not required to register or pay bonds.

Legal document assistants have the same educational background as paralegals and must be bonded and registered with the county in which they work. They must stamp each page of court documents they prepare with their business name, address, phone number and registration number. State law authorizes them to prepare court documents for consumers who represent themselves in court. They are not allowed to give legal advice, interpret forms for clients or tell clients what information to place on court forms.

They can link clients with attorney-approved law books and other resources, Gomez said. "Our job is to put the law into the people's hands," she said. Gomez saw the level of respect for the profession rise as more people entered the field and as incidents of fraud diminished.

"It's quite a step up. There were so many fly-by-nights and crooks," she said. In the past, fraudulent independent paralegals would take clients' money and disappear. "You don't hear about that anymore," Gomez said.

Gomez earned a paralegal certificate and bachelor's degree in business administration from California State University, San Bernardino in 1993 and 1996, respectively. In 1996 she started Just Document Preparation in her home, offering independent paralegal services.

In 2000 she posted a statewide bond and registered in Riverside County as a legal document assistant. Gomez registered in San Bernardino County in 2002 as a document assistant.

Gomez wanted to work at home to care for her son, Joel Smith, who was 12 when she started her business. And she wanted to maintain her independence. "It was never my intention to make my career working for an attorney. I just wanted to work for myself. It was something that really interested me," she said.

After five years, her business had outgrown her home office. Clients waited for their appointments in parked cars and in her yard. She rented space from an attorney on Brockton Avenue. Less than a year later, she moved to her current offices on Limonite Avenue.

CALDA's Mission Statement:

- ✓ Encourage high standards of ethical and professional conduct;
- ✓ Promote, encourage, and sponsor educational activities;
- ✓ Establish good fellowship and mutually beneficial networks among its members;
- ✓ Establish and maintain professional relationships with the legal community and other legal assistance/paralegal organizations;
- ✓ Afford business opportunities to all members of the profession regardless of age, race, creed, religion, or sexual preference;
- ✓ Promote the use of Legal Document Assistant services to the public;
- ✓ Carry out such other purposes as the Governing Board of the Association shall determine from time to time;
- ✓ The purpose of the Association shall be exclusively of a non-profit, mutual benefit nature, all within the meaning of Section 501(c) of the Internal Revenue Code of 1986, as amended.