



ACCESS

A Publication of the
California Association of Legal Document Assistants



September 15, 2003

PRESIDENT'S MESSAGE

It's hard to believe that we are once again ready for our annual conference. This year we have so many classes to choose from, you will have a hard time choosing. Ed Sherman from Nolo Occidental will be demonstrating Cal Support. I can say from experience that this program is very easy to use and is, in my opinion, priced just right for any LDA practice. We have several Commissioners teaching classes – Rich Vogl is back by popular demand. He is always entertaining and informative. Lynne Stein and her son David Stein will each be teaching a class. We look forward to seeing them again. Commissioner Foland and his wife will be presenters too. I just can't pick! The UPL class with Steve, Catherine and Richard is always fun – and wait until you see what we have planned this year.

Chris Donica will be with us again. He is our web master and has done an absolutely wonderful job of making our web site beautiful. Jeri Blatt, as our Technology Chair introduced us to him last year and has worked closely with him to make sure our needs have been met. Great job!! Have you checked out the referral section?

Anita Parga has been our Public Relations Chair (and is running for President). She has introduced us to Karen Graff. Karen has given the Board some impressive observations on how to market CALDA better and she will be available to answer any personal business questions from members. She is also our Key Note Speaker at the Saturday lunch.

Tamara Parker should have the permanent position of Conference Chair!! She has coordinated all of the Asilomar preparations and has done a marvelous job. Too bad we can't have it there every year.

Cara Gould and Cindy Elwell have also done wonders for CALDA this year. We are fortunate that both of them are running for office again this year. Without Cindy's help, I just can't imagine how we would have been able to move in a forward direction. She has the experience and the ability to give the Board a detailed cost breakdown for each contemplated mission we have set and a goal to get it done – with a profit. Without Cara's organizational skills and eagle eye, we would be a mess. She has been working quietly behind the scenes with the rest of the Board to make sure that everyone is registered properly.

My space is too short for the accolades for the rest of the board, so you will have to attend the membership meeting for the rest of my praises!!

Hope to see all of you at the conference. We will be unveiling the new logo and the plans for 2003-2004 year to increase the bottom line – more profits for our members. Stay tuned!

Diana

CALDA 2003 OFFICERS

Diana P. Wade
President
760-379-8138

Tamara Parker
Vice President
831-469-8470

Cara Gould
Secretary
559-298-5582

Cindy Elwell
Treasurer
510-523-7290

Marcia Burke
Professional Standards
510-791-2700

China Long
Newsletter
909-694-0608

Joann Gray
Interim Fund Raising
805-543-6923

Conference (Open)

Hinda Lucas
Education
661-944-6421

Anita Parga
Public Relations
559-673-6006

Robin Schumacher
Membership
559-442-4969

Jeri Blatt
Technology
650-574-2087

Debbie Diver
Legislative
530-242-8720

ATTENTION

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 Talk list 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**

Campaign Statement for President ANITA D. PARGA

I'd like to thank you for the nomination of President. I have served as your chair for Public Relations for one year.

To help you understand the purpose of my chair and the duties that I have performed on your behalf for the past year, I have listed them below:

- Prepare press releases to the legal community and our website regarding updates in the laws pertaining to CALDA activities and us.
- Communications with the county clerks and public to educate them on the purpose of our association and our individual businesses.
- Educating the legal community about CALDA.

On April 26, 2003, your board met to discuss several issues and one of them being public relations. As the chair, I decided that the office of public relations should become more aggressive for the association and its members. Therefore, I scheduled Karen Graff of Info-Media to prepare a presentation to your board. Her proposal was simple:

- Define the Goal
- Planning and Programming
- Taking Action and Communicating
- Evaluating the Program

The board members were asked to complete a survey regarding their concerns for public relations.

Using these surveys, a proposal was prepared. I plan to put the proposal into action so there will be a greater awareness of our association. In, July 2003 the proposal was presented to the board for review. After, the review of the proposal I asked Karen Graff to be present at the Board Meeting on October 17, 2003 to supply supplements to the proposal. After this board meeting, I hope to put the plan into action!

Plus, as an added benefit to membership, you will soon be offered a discounted public relations packet to improve the quality of your professional and personal lifestyle.

I plan to continue all the efforts I have put forth in holding the chair for Public Relations, into the position of President.

Thanking you in advance for your vote.

Anita D. Parga
Public Relations

***Campaign Statement For
Board Member
By Robin Schumacher***

Candidate for Board Member:
California Association of Legal Document
Assistants: 2 year term

I believe that the term "Legal Document Assistant" needs to become more widespread, recognizable and respected. Through our efforts in this organization, we can educate the public as to what an LDA is and become a strong and resilient branch of our legal community as well. With certainty, there is a place for several variations of the legal profession in each community. Through our shared efforts, in conjunction with our Mission Statement, we are capable of making positive changes.

2004 will be my 10th year in business as a Certificated Paralegal and Legal Document Assistant. I graduated from the San Joaquin College of Law Paralegal Training program in

Fresno in 1994. I currently work as an LDA in my own office in downtown Fresno. This profession has many rewards and challenges. It is so advantageous to have such an organization as CALDA for support and information. I first joined CAIP (now CALDA) in 1998 and have immensely appreciated the support and guidelines offered through the organization and many of its individuals. I am currently serving my second year on the board as Membership Chairperson.

My husband Craig, a vineyard farmer, and I, with our children, John 24, Aaron 22, Centa 17, Anne 13 and Caleb 7, have lived in the Fresno area all of our lives. We are active in various local community, agricultural, educational and sporting events and projects. By far, my greatest and most treasured asset is my family.

For the sound future of our profession, I wish to emphasize education of the public and of our local legal communities.

I respectfully ask for your vote and the privilege to serve you on your Board of Directors.

Robin Schumacher

***Campaign Statement for Vice-President
JERI BLATT***

I have been nominated for the office of Vice President of CALDA and have accepted the position.

I have served on the board as Technology Chairperson for the last year and, under my direction, the webmaster and I have revamped the entire website with a minimum degree of inconvenience to our members. At the present time, the site is completely updated with the latest information available to us. Since I have a very close working relationship with the webmaster I feel I should continue as the Technology Chairperson, since all that is required now of the site is to keep it updated and maintained.

As for the office of Vice President, I feel that since I now have limited duties as Technology

Chairperson I will be able to devote more time to the office of Vice President and continue serving on the board. I feel I have proven my capabilities as Technology Chairperson and will prove that I am also capable of serving as Vice President.

As an LDA for only one year, I know I have a lot to learn and am willing to devote the time to learn what is necessary to do the best I can for our organization. The talklist has given me a wealth of information, as have many members of the organization, in my quest to learn. For all that has been willingly passed on to me I feel that it is important for me to give something back to a great organization.

Jeri Blatt

AN INTERVIEW WITH THE PRESIDENT

Diana P. Wade

By China Long

In 1992, a young lady by the name of Diana Wade sat in her office contemplating whether or not she wanted to get involved in Bankruptcies. She then picked up a Nolo Press Book and saw the name of Virginia Simmons, our past president, now deceased. Little did she know that the phone call to Virginia would change her life forever and the lives of so many other people.

Diana Wade, current president of CALDA is a true leader. After chatting with Diana, you feel that you can conquer any mountain and won't be afraid to try. She has a calming spirit that causes any uncharted trails to not look so threatening. She has held several different offices in our organization. This year will end her second year as President. She is totally committed to whatever is put before her and has always given 100%. I had an opportunity and privilege to interview Diana over the phone. Our interview follows:

CHINA: Diane, "How long have you been with CALDA?"

DIANA: 11 years, I joined in August, 1992

CHINA: What offices have you held?

DIANA: Fund raising for three years, Technology for one year, Vice President under Virginia Simmons for two years, National Federation of Paralegal Association (NFPA) primary representative for CALDA. Last two years - President.

CHINA: What would you say has been your most memorable time with CALDA?

DIANA: During the time the legislation was passed. It made a tremendous impact.

CHINA: What would you say has been your most challenging time?

DIANA: When NFPA never understood what CALDA does, they never got it.

CHINA: Do you ever feel like quitting? I know you have so many responsibilities and work so hard.

DIANA: No, I care a lot for this organization and want it to be very successful and if I can do my part to help make this happen, then I will.

CHINA: Where do you see yourself in the future with CALDA?

DIANA: I will always see myself with CALDA. Right now, I need to step back and be an advisor.

CHINA: What would you like to see for CALDA?

DIANA: I would like to see CALDA become more politically active and more member driven. There are about 500 LDA's, more than half should be members of CALDA. Everybody should at least once, take a shot at being on a committee or on the board. Being on the board helped me make the transition into Social Security. Being before people gives you more confidence.

CALDA Conference Instructors and Speakers

RICHARD G. VOGL, COMMISSIONER, SUPERIOR COURT, Orange County
“Requirements of a Family Law Judgment”

STEPHEN FOLAND, COMMISSIONER, SUPERIOR COURT, Alameda County
“Guardianships”

DAVID J. ELEFANT, ATTORNEY AT LAW, JUDGE PRO TEM,
PROBATE REFEREE, COURT APPOINTED MEDIATOR, Walnut Creek, CA
“Probate”

DAVID STEIN, ATTORNEY AT LAW, Alameda County
“Advanced Family Law”

RICHARD LUBETZKY, ATTORNEY AT LAW, Los Angeles, CA
“UPL”

STEPHEN ELIAS, ATTORNEY AT LAW, Lake County, CA
“UPL”

CATHERINE ELIAS, “THE GRAND LADY OF ALL LDA’S”, Lake County, CA
“UPL”

RAEANNE PASSANTINO, LEGAL SERVICES COORDINATOR, TRI-VALLEY HAVEN,
Livermore, CA “Domestic Violence”

KAREN GRAFF, VICE PRESIDENT, PERSONALIZED INFO-MEDIA
Key Note Speaker
“Public Relations and the Critical Ingredient for Business Success”

ALAN ROSENTHAL, San Francisco, CA
“Bankruptcy”

MEL IRVIN, PARALEGAL, THURBER LAW OFFICES, Santa Clara, CA
“Wills & Trusts”

MIKE BAILEY, Alameda County
“Domestic Partners Act”

HELEN BELLAMY, LDA, Hayward, CA
“Beginning Family Law”

LYNNE STEIN, LDA, Alameda County
“QDRO” (How to successfully divide a retirement plan)

CINDY ELWELL, LDA, SECRETARY-CALDA, Alameda County
“How to Operate a Successful Legal Document Assistant Business”

TAMARA PARKER, LDA, VICE-PRESIDENT-CALDA, Santa Cruz County
“Step-Parent and Adult Adoptions”

DIANA P. WADE, LDA, PRESIDENT-CALDA, Kern County
“Social Security Disability”

California Association of Legal Document Assistants

**16th Annual Conference
October 17-19, 2003**

Asolimar Conference Center
800 Asilomar Blvd.
Pacific Grove, Ca.
831-372-8016

CLASSES ARE CHOSEN AT THE CONFERENCE

FRIDAY 10/17/03

7:30 am Registration

8:30 – 9:30
Operating an LDA Business Part
1
MCLE :45 mins

AM Session 9:30 – 11:30
MCLE – 1 ½ hours

Beginning Family Law -or-
Adoptions -or-
QDRO's

11:45am to 1:30pm

Lunch &
Networking

PM Session 1:30 – 3:30
MCLE 1 ½ hours

Probate -or-
Social Security Disability –
or-Bankruptcy

4pm to 6:00pm

Roundtable Discussion
Issues in Family Law

SATURDAY 10/18/03

7:30 am Registration

8:30 – 9:30
Operating an LDA Business Part 2
MCLE :45 mins

AM Session 9:30 – 11:30
MCLE 1 ½ hours

Requirements of a Family Law Judgment -or-
Guardianships -or- Domestic Partner Act

11:45am to 1:30pm

Vendors
Lunch

Networking & Keynote Speaker
Karen Graff
MCLE 1 hour

PM Session 1:30 – 3:30
MCLE 1 ½ hours

Wills & Trusts -or-
Domestic Violence -or-
Advanced Family Law

4:00pm to 6:00pm
General Session for
Membership & Elections

7:00pm
Installation Dinner &
Entertainment

SUNDAY 10/19/03

7:30am Registration

9:00am to 11:30am

UPL Session Open to all Members &
Non-Members

*Mandatory class for
CALDA Members!!*

11:45am to 12:15pm
General Closing Session

12:30pm
CONFERENCE CLOSES

12:45pm to 2:30pm

Board Meeting for all
Incoming & outgoing
Board Members

**The California Association of Legal Document Assistants
(CALDA)**

**is a State Bar of California approved MCLE provider
A maximum of 8.5 credits is possible**

Conference Price only – You must make own room and meal reservations

CALDA Members	\$350.00
Non-Members	\$525.00

<u>Members per day Registration</u>	<u>Friday Only</u>	<u>Saturday Only</u>	<u>Sunday Only</u>
	\$210.00	\$210.00	\$25.00
<u>Non Members per day Registration</u>	<u>Friday Only</u>	<u>Saturday Only</u>	<u>Sunday Only</u>
	\$210.00	\$210.00	\$25.00
Children 7-17 add \$56.42/per day			

Above includes all conference materials ONLY

Name: _____	Phone: _____
Address _____	Home Phone: _____
City: _____ Zip: _____	FAX: _____
E-Mail Address: _____	

Please make Checks payable to CALDA & mail to:
Cindy Elwell, Divorce With Dignity, 1138-A Ballena Blvd., Ste 3, Alameda, CA 94501, or phone 510-523-7290

Or Credit Card information: # _____ Exp. _____
Visa ___ Mastercard ___

Signature _____

A NEW CALIFORNIA LAW

California Business & Professions Code Section 17538, places several regulations on businesses advertising and making sales over the Internet or other electronic means of communication.

Section 17538(d) states that in any transaction involving a buyer located in California, a vendor, before accepting any payment, must disclose to the buyer in writing or by electronic communication (e.g. e-mail or on-screen notice): (1) the vendor’s return and refund policy; (2) the legal name of the vendor; and (3) the complete street address from which the vendor's business is conducted. Another provision governs the means for disclosing the vendor's legal name and address by on-screen notice.

Section 17538(a) states that within 30 days of accepting payment for goods or services offered over the Internet, a company must (1) ship or provide the goods or services ordered; (2) provide a full refund; (3) send written notice advising the buyer of the delay and offer a refund; or (4) provide substitute goods or services and offer a refund. There are various exceptions to the thirty day provision, including one exempting companies whose advertising indicates the possibility of a delay in delivery.

Violation of either provision is a misdemeanor punishable by up to six months in jail and/or a fine of up to \$1000.

Treasurer's Report **By Cindy Elwell**

To date, we have almost reached our goal in number of participants for the Conference; we still need 3 more registrations, so get your reservation in if you have not yet done so; there's still time. Overall, it does look like we will make our revenue and net profit goals on the conference so that is very exciting. Anyway, this is our time to get together and learn and network with and from each other, so please join us at Asilomar; I know you will be glad you did and it will help you increase the bottom line of your own business.

I have sent out invoices for the balance due for everyone, and these payments should be mailed to me by September 30th, so we can finalize everything. If you owe money for the conference and have not received an invoice, please e-mail me at: Dwdignity@aol.com.

A special invitation to my class, which is being offered in two parts on Friday and Saturday mornings: *How to Operate a Successful LDA Business*. The first morning, we will review how to set up your LDA business and concentrate on the things to do and not to do; try to have a "mock" interview with a potential client to help

us keep on track, and review client files, tickler systems, etc. And in the second session on Saturday morning, we will start working on your business plans, look at some marketing ideas, and help you price your business so that you can enjoy a nice large profit in your business. So I hope you will sign up for the class, either both sessions or just one session, whatever you need, I promise you'll learn something new and increase your profitability. Because there's no reason, we all cannot be successful in this business if we operate an efficient business. If you are thinking that you cannot afford to attend the conference, and this is your primary business, that's an indication that you need to attend more than ever and find out how to be successful, so beg, borrow or charge to attend the conference and learn how to be successful and profitable. It took me a long time (six years) to really understand the business and believe that I could be successful. I now know that I could have cut that time in half, if I had devoted more energy and resources to building *Divorce With Dignity*, rather than running around trying to do too much to "get by." We are professionals and we deserve to earn a decent living and invest in ourselves for our future growth.

Hope to see you at Asilomar!!

