



September 2006

## ACCESS

A Publication of the  
California Association of Legal Document Assistants  
[www.calda.org](http://www.calda.org)

### President's Message

It is hard to believe that another year has almost gone and Conference time is here again. This conference is a once in a lifetime event, as CALDA is celebrating its 20<sup>th</sup> birthday. Not only will we honor this achievement, but also those four Founders who made this achievement possible - Catherine Elias-Jermany, Mari Loftus, Jim Snyder and Glynda Dixon Mathewson. Without their dedication and the strong belief that they had in our profession in August 1986, this memorable event would not be taking place. I am truly proud to honor these individuals.

There have been many changes on our Board of Directors during this past year. Betty Cole resigned her position as Treasurer because her husband relocated his place of employment. It was important to me that her replacement be someone who was as good as Betty, and I am confident that I have found that person in Odine Limansky. Nancy Newlin had to resign her position as Conference Chair because of family health problems, and was replaced by Kimberlie Hall. Due to a very busy schedule, Debbie Driver has changed positions from Newsletter Chair to Nominations and Elections Chair. Carl Knoll, who has already shown that he is an extremely valuable asset to this Board, has replaced Debbie as Newsletter Chair.

Connette Blalock will be resigning her position as Vice President because she is retiring and moving to Oregon. Connette has been a great support to the Board of Directors, and to me personally. She has been a valuable member of CALDA, and will be truly missed. I have had an outstanding Board of Directors this year. Connie Crockett gave endless hours to the project of revising the bylaws. There were times when I know that she was absolutely exhausted, but she continued on in spite of this. Robin Schumacher has kept the administration side running smoothly, and is such a valuable asset to both this organization, and to me. She calmly, and without question, takes on anything that is asked of her. Moira Boyle, with her incredible enthusiasm for CALDA and for our profession, has pushed on, reaching amazing new horizons in her county. Marcel Neumann's valuable advice always adds a sense of quiet logic to the discussions. Annette Gomez is a natural to the position of Secretary. When Betty Cole resigned, I took on the Treasurer's job until I could find a replacement for her. About a month ago, Annette called me and said that she felt that she should offer to take this position. She admitted to me that she does not like to do her own bookkeeping, but wanted to help me in some way. I don't think Annette realized just how much this offer meant to me. Robin Wilson helped me to see the beginning of my dream of online education throughout the year. Andrew Voller has become not only a valuable board member, but is also a source of continued advice on matters pertaining to my own business. Debbie Driver provided an extremely valuable contribution in the writing of several brochures. Kimberlie Hall has gathered a wide variety of excellent

speakers for our Conference.

We have accomplished much as a Board this past year. The bylaws have been revised, the process of reviewing the brochures is well under way, and we have started to offer education via teleconference; however, our accomplishments pale in comparison to those of individuals such as Catherine, Jim, Glynda and Mari. It is their courage and determination that has contributed to the path that CALDA has taken over the last 20 years.

I would like to recognize the following members for their continued support throughout the years:

Lois Isenberg, Sylvia Cherry, Richard Lubetzky, Steven Elias, Diana Wade, Helen Bellamy, Lynne Stein, Kathy Ricci and China Long. I am truly honored to know all of you, and am looking forward to seeing all of you at this very special celebration.

Carol Ludlow  
Board President

**PRESIDENT**

Carol Ludlow  
 Phone: (408) 973-7861  
[President@Calda.org](mailto:President@Calda.org)

**VICE PRESIDENT**

Connette Blalock  
 Phone: (909) 384-0852  
[VicePresident@Calda.org](mailto:VicePresident@Calda.org)

**SECRETARY**

Annette Gomez  
 Phone: (951) 685-5444  
[Secretary@Calda.org](mailto:Secretary@Calda.org)

**TREASURER**

Odine Limansky  
 Phone: (714) 836-0300  
[Treasurer@Calda.org](mailto:Treasurer@Calda.org)

**PUBLIC RELATIONS**

Moira Boyle  
 Phone: (714) 998-8259  
[PublicRelations@Calda.org](mailto:PublicRelations@Calda.org)

**CONFERENCE**

[Conference@Calda.org](mailto:Conference@Calda.org)

**MEMBERSHIP**

Robin Schumacher  
 Phone: (559) 485-5445  
[Membership@Calda.org](mailto:Membership@Calda.org)

**EDUCATION**

Robin Wilson  
 Phone: (925) 228-7780  
[Education@Calda.org](mailto:Education@Calda.org)

**PROFESSIONAL STANDARDS**

Kathleen Mountjoy  
 Phone: (916) 644-3090  
[ProfessionalStandards@Calda.org](mailto:ProfessionalStandards@Calda.org)

**NEWSLETTER**

Carl Knoll  
 Phone: (805) 237-7770  
[Newsletter@Calda.org](mailto:Newsletter@Calda.org)

**TECHNOLOGY**

Marcel Neumann  
 Phone: (510) 782-6811  
[Technology@Calda.org](mailto:Technology@Calda.org)

**LEGISLATIVE**

Andrew Voller  
 Phone: (209) 271-2243  
[Legislative@Calda.org](mailto:Legislative@Calda.org)

**FUND RAISING**

Connie Crockett  
 Phone: (530) 265-0192  
[FundRaising@Calda.org](mailto:FundRaising@Calda.org)

**NOMINATIONS AND ELECTIONS**

Debbie Driver  
 Phone: (530) 242-8720  
[NominationsandElections@Calda.org](mailto:NominationsandElections@Calda.org)

**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 A member community environment and forum participation for all voting members. This service enables our members to help and be supportive to each other. If you have not received your forum access, contact the administrator at [forums@calda.org](mailto:forums@calda.org)

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

- ✓ Increased professional knowledge and networking opportunities.
- ✓ Awareness of events and developments pertaining to the LDA profession.
- ✓ Subscription to the newsletter, ACCESS.
- ✓ A voice in decisions affecting the profession at the local, state and national levels.
- ✓ Discounts on educational seminars and workshops.
- ✓ 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-Mail to:  
[newsletter@calda.org](mailto:newsletter@calda.org)**

**Computer System used PC only, Software used, MS  
 Word or Word Perfect 12 or lower ONLY.**

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

## Words from our Secretary *Annette Gomez*

I've been the Secretary for almost 1 year now and the VP of the Inland Empire Chapter for almost 2 years. I am grateful for this opportunity to serve. I am always open to learn new things and I believe that any successful businessperson feels the same way. That mindset only enhances our endeavors and increases the bottom line. Along with attending and preparing the minutes for the board meetings, the chatroom meetings, conducting votes by fax, receiving minutes from the local chapters, helping put together our January workshop and our monthly Chapter meetings, I have learned quite a few things in this short period of time.

I'm so glad to see the formation of new chapters and continued involvement. Our Inland Empire Chapter has been very productive. The speakers that have offered their time have been very motivating. The one day workshop we sponsored in January was also successful. We had one judicial officer, one family law facilitator, two attorneys, and lunch for less than \$40.00 per person. Compare that to any other educational opportunity. Since I became secretary, a chapter was formed in the High Desert, Orange County (love your logo), Los Angeles and Sonoma County. Support the people who have taken the initiative. It can be hard to begin with a few people, but with desire and commitment, great things evolve for everyone who participate.

The more you are involved the more you will increase our knowledge. That means more dollars in your bank account if you take that knowledge and apply it to your business. Although we have chosen to be part of an honorable profession to help people, I know that we are also in business to make money.

Being involved in CALDA provides the opportunity for you to be a professional. If you read the Forums, attend Chapter meetings and workshops, make good contacts in this group, your business will prosper. A good businessperson is resourceful, and I believe that our organization is the best resource for LDAs.

I hope you will get involved. Our profession has undergone major changes and continues to do so. Many new opportunities and changes are happening this year alone, our 20<sup>th</sup> year. Our alliance with NALDP will strengthen our purpose. We made several decisions at our board meeting (read the minutes on our website) that will make our organization and profession more prominent and more beneficial for you.

## Words from our Education Chair *Robin Wilson*

It's hard to believe that almost a year has passed since our last conference and our upcoming 2006 conference celebrating our 20<sup>th</sup> Anniversary is nearly upon us! Your education committee put together and held CALDA's first two teleconference classes this year!

The first teleconference class was held on July 29, 2006. Richard Lubetzky, our "CALDA Attorney" generously donated nearly 2-1/2 hours of his time, educating and reminding us of the various aspects of our LDA business as relate to UPL, always endeavoring to help us run our business legally and stay out of trouble. It covered such areas as advertising requirements, giving legal information, telephone disclaimers, and much more. Fourteen CALDA members participated in the conference call class.

Our second teleconference class was held on September 16, 2006. The instructor was Odine Limansky, and the topic was "An Overview of Wills and Trusts". Odine has her own LDA business in Santa Ana, California, where she offers document preparation services in such areas as business entities, bankruptcy, deeds, dissolutions, trusts, wills, and trust administration. Odine took the class through back-up and pourover Wills, then through a single person living trust, a joint living trust, an AB Trust and an AB Disclaimer Trust. The class also covered the preparation of the Deed to transfer the property, the Preliminary Change of Ownership Report, the Assignments and Certificate of Trust. Five CALDA members participated in the class.

The Conference Call service we use allows us to record the conference call so that those who cannot participate "live" in the conference call itself can visit the website ([www.freeconferencecall.com](http://www.freeconferencecall.com)) and with the appropriate login and password

information, can either listen online to the call, or can download the call and listen that way.

Our webmaster has set up these classes for registration on our website. Visit the CALDA website at [www.calda.org/mcle](http://www.calda.org/mcle) and register there, or visit [www.calda.org](http://www.calda.org), choose Member Services, click on MCLE, then register. Members will need to download any materials at the time of registration, as there is no way to go back to get them currently once you leave the registration area. So, if you were unable to participate in the class on 9/16/06, it's not too late to take advantage of the class content!

The UPL/Ethics class is no longer available for download; however, our webmaster has saved the conference call to a CD, so if there is any interest, let us know and we can look into making it available to members at a nominal cost to cover the materials and shipping costs. It is a 60 mb file so at this time, we can't make it available on our CALDA website due to storage capacity. Each class recording will be available on the [www.freeconferencecall.com](http://www.freeconferencecall.com) website until the next class is offered, at which time it is written over. Again, we are working to make CDs available to members. Watch the forums, your email and the website for further details

We hope that more members will take advantage of these classes in the future so that we can continue to offer them. It takes a lot to organize the classes, but we felt it would be a great way for members all over the state to be able to take classes at a reasonable cost, in the comfort of their own home or office, with no traffic or parking challenges! I received an email from one member who had participated in the UPL class, who told me that he had downloaded the UPL class recording and had listened to it several times, and each time he picked up something else.

We'd like to know what other classes you would be interested in having offered in the future. I've talked with Robin Schumacher and we tentatively set the next class for November to cover "An Overview of Evictions" since Evictions are not being covered at the CALDA conference this year.

I hope to see many of you at the Conference next month in Southern California for our "20<sup>th</sup> Anniversary" celebration. I won't be continuing on for the 2006-2008 term as CALDA's Education Chair since I was appointed to finish Betty Cole's term last year when she was elected as the CALDA Treasurer, so I will be "turning over the reigns" to a newly appointed/elected Education Chair at the end of the Conference next month. Thanks to those of you who have participated in the classes who have expressed your gratitude in offering them. It is nice to have our efforts be found to be useful by members, especially since that's our ultimate responsibility! There is a lot that goes on behind the scenes in each board member's position to make things happen for the membership, so I personally really appreciate the support.

## Words from our Public Relations Chair *Moira Boyle*

On September 9<sup>th</sup>, 2006 I had the pleasure of attending a one day seminar titled "Strategic PR: Be Heard through the Clutter". I represented CALDA as the PR Chair, and was able to network with other nonprofit agencies such as, The United Way, Habitat for Humanity, California Water Environment and Art Institute of Orange County. The media panelists included KABC-TV, The Orange County Register, Orange Coast Magazine and The Daily Pilot.

It wasn't until this seminar that I realized how much importance the Public Relations Chair is. We haven't until now had media come in and see what CALDA offers to the public. The only time the media has an interest is when a non-LDA practices law, or whose self-help services damaged a consumer.

We didn't have a plan set out to market CALDA as a business and take advantage of what we do to get the media's interest.

One of the best things about this seminar was that I was given over 2 hours of free consultation with PR Specialists. They were able to help me work out a PR plan for CALDA.

"Who are we, what do we represent and what makes us different"? This was what I started out with, and quite honestly CALDA is different because we are the only CA State Legal Document Assistant Organization.

Yet how do we as a Nonprofit compete with a corporation that has a larger PR budget?

Our strategic plan should involve:

- Situational analysis: "Where are we now"?

- Planning: “coming up with ideas, doing something different. Perhaps auctioning off a trust to the public through a silent auction once a month for a year, using our website.
- Evaluation: after a year how many people have we reached out to by implementing something as easy as donating our services for fundraisers.

**One of the best resources we have is our website, and using the Internet to reach the entire state. Our website caters to so many individuals, which is their first impression of us as an organization.**

Right now many people socially network online. CALDA can take advantage of the ‘net if we can just find our audience and target them. Which is why it is essential we have a professional polished web image so we can link up to legal professional organizations.

So many members can start their own PR base in their county. I noticed Jo Ann Gray has CALDA linked to San Luis Obispo County Bar Association’s website. Well done Jo Ann.

All of us are walking talking PR, we all can make an effort to get the message out there of what we as Legal Document Assistants do, and better yet CALDA.

PR is always the lowest budget for many nonprofits, and with the PR budget being \$800.00 there wasn’t much we can do. Bill Gates quoted, “If I were down to my last dollar, I would spend it on PR”.

When I tried to get our event in the newspaper, no media resource covered Cherry Valley. Ironic, it had to be on fire for the media to go out there.

CALDA will be taking advantage of a PR opportunity with our conference being in Ontario. The general area has a wide variety of newspapers, that we can have coverage of one of the most important events in CALDA’s history. I hope the turnout will be the best ever, as the media will finally get to see just who CALDA is, and if there is only 50 of us, what does that say as an organization we all support?

I look forward to seeing so many CALDA faces this year at our conference. I am very excited about the new location and think it is advantageous to make CALDA visible.

**Words from our Membership Chair**  
***Robin Schumacher***

Please join with me in welcoming the following new members:

Angie Isaacson	Placer County
Diane Farley*	Visalia, CA
Tyrone Wade	Santa Clara County
Shawna Velasco	Riverside County
Tammy Casados*	Anderson, CA
Victor Leos	San Bernardino County
Terry Albeyta	San Joaquin County
Alice Verstegen	Orange County
Julia Nissley	Los Angeles County
Sharon Self*	Rancho Cordova, CA
Mary Ann Vorasky	Los Angeles County
Alicia Ayers	Nevada County
Maria Fierro	Sacramento County
Cecilia Smrkovsky	Contra Costa County
Richard Grigsby*	Folsom, CA
Sean Baeza	Sonoma County
Thomas Connelly	Sonoma County

New Members – WE WANT YOU! If you are interested in participating on a committee and helping CALDA with its mission, please give me a call at (559)485-5445. I will make sure you get connected with the right person. Committees available:

Public Relations, Education, Membership, Technology, Conference, Newsletter, Professional Standards, Legislation, Fund

**Words from our Professional  
Standards Chair  
Kathleen Mountjoy**

The standards we uphold as members of this association grant each member a great reputation for excellence. We stand united in our endeavor to educate people by bringing public awareness to our profession. Our business is constantly changing and CALDA is changing right along with the profession. We all are making great strides toward the future and success. Technology brings new concepts in business practices and procedures. There are now many interactive law web sites. Sign up with your Visa, fill out a questionnaire or legal papers, and presto – you can do your own disso . . . or bankruptcy . . . or trust. Soon, we will all be competing with these sites and we will also employ interactive fields for “do-it-yourselfers” who want to save time and money. We will soon all be offering “no fuss” document preparation with little practical application on our part. With tremendous advances in technology and the global reach of the internet, we need to remain true to our common goals – to educate the public while maintaining our reputation for excellence.

CALDA is in the process of launching new brochures and questionnaires. These are the tools used by CALDA members to educate the public and obtain necessary information from clients for the purpose of document preparation. CALDA is also offering seminars at conference on topics concerning LDA web pages, design, and marketing.

The Professional Standards Committee would like to gently remind members of the terms of use governing CALDA brochures and questionnaires:

**CALDA members are NOT allowed to offer these brochures or questionnaires as a downloadable product via the member's website unless:**

- **The download process is accomplished through a secure server with restricted access;**
- **The customer has paid for and retained the CALDA member's services for the type of brochure/questionnaire being downloaded; and**
- **General visitors (browsers) to the member's website are not allowed access to these materials.**

**CALDA members are free to offer and otherwise disburse printed/hardcopy brochures at their will.  
Questionnaires should only be utilized for existing clients.  
Your purchase of these products constitutes your acceptance of CALDA's terms of use.**

(General excerpt copied from CALDA.org Products Page)

This committee has tabled two other projects, which were supposed to be completed prior to conference. It is our hope that we will be able to pick up and go with our plan to review and revamp procedures related to consumer complaints and to streamline the member complaint process. The committee also promised to draft a letter to each county's District Attorney Consumer Protection Unit introducing CALDA, including CALDA's policies supporting high standards of ethical behavior and business practices. Our goal is now to complete these tasks by year's end.

The Professional Standards Committee needs your help! We are a committee of three and are looking for members wishing to donate time and serve CALDA. We are seeking sharp, open-minded professionals who are well versed in the rules of the association and the provisions of the B&P governing Legal Document Assistants. Candidates must agree to keep all matters before the committee confidential and should be ready to accept the challenge of working on the Professional Standards Committee. And, trust me, it is often a challenge.

*Lascili tutti i lotti di marca di soldi.  
Ciao!*

**Words from a Past President  
Jeri Blatt**

As a past president of CALDA I am pleased to be a part of this special newsletter and also a part of this great organization. I served as president in the year 2004 as a result of the elected president resigning due to personal reasons – so, as Vice President, the job was mine. I was terrified to discover that I was now the leader. This wasn't the plan when I took on the position of Vice President. How could I do this? I was a new LDA, hardly knew anything about my job let alone how to run an organization like CALDA. All I kept thinking was, these people are experienced, talented professionals. I shouldn't be in this spot. How could I get out of this? Resign as Vice President? Let the next person in line take over? I had nightmares and cold sweats just thinking about it.

I decided, with encouragement from Diana Wade and several board members, who apparently had more confidence in me than I had in myself, to do it. And I'm glad I did. Plus the thought of quitting was worse than nightmares and cold sweats.

The experience was challenging, exhausting, frustrating at times, always interesting, never boring! With the help of a wonderful, cooperative board, we made it through the year, accomplished a few things and had a great conference. All in all, it was a good year despite having a novice at the helm. I learned a tremendous amount working with such talented people and ended up very grateful for having had the opportunity to fulfill and carry out the duties of the office. I look forward to being a part of the 20<sup>th</sup> year celebration of CAIP/CALDA in September and for many years to come.