

21ST ANNUAL CONFERENCE
 CELEBRATING CALDA'S 22ND YEAR!
 OCTOBER 17-19 — FRESNO, CA

Access Newsletter — Conference 2008

WELCOME TO FRESNO!

We welcome you to the 2008 Annual Conference of the California Association of Legal Document Assistants. We are excited to be holding our 21st annual conference!

All of the events will be held in the Ramada University Inn, including all workshops, general sessions and exhibitors.

This convention is one of California's premier conferences, allowing legal document assistants (LDAs) from across the

state an opportunity to network with other LDAs and gain insight and motivation to return to their business and tackle them with renewed enthusiasm.

As LDAs you establish and maintain professional relationships with the legal community and other legal assistance/paralegal organizations.

It is by Setting the Standard...education, ethics, and excellence that LDAs continue to prosper.



Tina Sandoval
 CALDA President

We appreciate your contribution to this profession.

In This Issue:

<i>Welcome To Fresno</i>	1
<i>B & P Codes §§6400-6415</i>	1, 2
<i>The Qualities Of A Successful LDA . . .</i>	2, 3
<i>News From The Legislative Chair</i>	3
<i>Did You Know...</i>	4
<i>Board Contact Information</i>	4
<i>Agenda</i>	(Insert)

BUSINESS AND PROFESSIONS CODES SECTIONS 6400-6415...REMINDER

Who cares about the Business and Professions Codes? Well, we should all care. At least if you want to stay out of hot water and in compliance with the laws.

We are in the business of preparing legal documents for customers. We are expected to know and be in compliance with the laws that govern our profession;

therefore, as a reminder, let me point out just a few requirements of the laws, as follows:

Business & Professions § 6408

The registrant's name, business address, telephone number, registration number, expiration date of the registration, and county of registration shall appear in any solicitation or advertisement,

and on any papers or documents prepared or used by the registrant, including, but not limited to, contracts, letterhead, business cards, correspondence, documents, forms, claims, petitions, checks, receipts, money orders, and pleadings.

How many are of you are in 100% compliance? If not, you should make it a priority for your own protection.

Business & Professions § 6408.5

All advertisements or solicitations published, distributed, or broadcast offering legal document assistant or

(CONTINUED ON PAGE 2)

unlawful detainer assistant services shall include the following statement: "I am not an attorney. I can only provide self help services at your specific direction." This subdivision does not apply to classified or "yellow pages" listings in a telephone or business directory of three lines or less that state only the name, address, and telephone number of the legal document assistant or unlawful detainer assistant.

Note: If you are incorporated, use: "(name) is not a law firm. I/we cannot represent you in court, advise you about your legal rights or the law, or select legal forms for you."

Whether you are advertising in a newspaper, on the radio, television, or on Craig's List, you MUST be compliant for your own protection. Also, as a member of CALDA, it is expected that your business practices are compliant.

Carl Knoll, Professional Standards Chairperson



Poolside...



Foyer...



THE QUALITIES OF A SUCCESSFUL LDA...

This is a great list created by Life-Hack, of qualities that successful people have, which have been noted in many books on the subject. I doctored it up a little.

1. They look for and find opportunities where others see nothing. They know that attending the CALDA conference is the best opportunity to improve their businesses.
2. They find lessons while others only see problems. They take advantage of CALDA's generous supply of opportunities to learn.
3. They are solution focused.
4. They consciously and methodically create their own success.
5. They may be fearful, but they are not controlled or limited by fear.
6. They ask the right questions -- the ones which put them in a positive mindset and emotional state. They

ask the right people, the ones who will be attending the CALDA conference.

7. They rarely complain.
8. They don't blame, and take complete responsibility for their actions and outcomes.
9. They always find a way to maximize their potential, and use what they have effectively.
10. They are busy, productive and proactive. They attend the webinars, the conference and participate in chapters.
11. They align themselves with like-minded people at the CALDA conference and chapter meetings.
12. They are ambitious. They set high standards, like the ones that CALDA sets for its members.
13. They have clarity and certainty about what they want.

14. They innovate instead of imitate.
15. They don't procrastinate. They don't wait until the last minute to sign up for the CALDA conference.
16. They are life-long learners.
17. They are glass half full people, while still being practical and down-to-earth.
18. They consistently do what they need to do, regardless of how they are feeling on a given day.
19. They take calculated risks.
20. They deal with problems quickly and effectively.
21. They don't believe in, or wait for, fate, destiny, chance or luck.
22. They take action before they have to.
23. They are more effective than most at managing their emotions.

(CONTINUED ON PAGE 3)

THE QUALITIES OF A SUCCESSFUL LDA...(CONTINUED)

24. They are good communicators.

25. They have a plan for their life and they work methodically to turn that plan into a reality.

26. They become exceptional by choice.

27. They work through the tough stuff that most would avoid.

28. They have identified what is important to them and they do their best to live a life which is reflective of those values.

29. They have balance. They know that money is a tool and ultimately, it's just another resource.

30. They understand the importance of discipline and self-control.

31. They are secure in their sense of self-worth.

32. They are generous and kind. They give something back to the community.

33. They are happy to admit mistakes and apologize.

34. They are adaptable and embrace change. They realize that if they don't their business will not survive in the long run.

35. They keep themselves in shape physically.

36. They work hard and are not lazy.

37. They are resilient.

38. They are open to, and more likely to act upon, feedback.

39. They don't hang out with toxic people.

40. They don't invest time or emotional energy into uncontrollable things.

41. They are happy to swim against the tide.

42. They comfortable with their own company.

43. They set high standards for themselves.

44. They don't rationalize failure. They know it's another opportunity to learn.

45. They know how to relax, enjoy what they have in their life and to have fun.

46. Their career is not their identity, it's their job.

47. They are more interested in what is effective than in what is easy.

48. They finish what they start.

49. They realize that not only are they physical and psychological beings, but emotional and spiritual creatures as well.

50. They practice what they preach.

51. They tell other professionals about the LDA profession and about CALDA.

*Annette Gomez
CALDA Secretary*

"They ask the right questions - the ones which put them in a positive mindset and emotional state. They ask the right people, the ones who will be attending the CALDA conference."

NEWS FROM THE LEGISLATIVE CHAIR...

DO YOU care about the difficulty inflicted on consumers and your business as a result of erratic, misleading Yellow Page headings for LDAs?

DOES IT bother you that there are no guidelines for this?

DO YOU care enough to exert a little energy to help create a database for CALDA's further review and action?

WOULD YOU be willing to fax, mail or email the information from your phone book?

WOULD YOU please include the name and address of the phone book company?

DO YOU really care? Then please don't assume someone else from your area will do this so you won't need to.

Please fax to: (530) 265-0197 OR email to legislative@calda.org, OR mail to SOS at 307 Spring Street, Suite C., Nevada City, CA 95959

If you are a Notary, check out the new language under Government Code section 8206.5 about sending out copies of your journal. While you are at it, check out section 8206 of this code, and 1185 of the Civil Code for information on allowable forms of ID for credible witnesses.

For those of you who began tracking DeVores Assembly Bill 250 in February, 2007 (the "Beneficiary Deed" or the revocable "Transfer Upon Death Deed or TOD), the bill did not pass in June 2008 and is up for reconsideration. You will see that the current version of this bill looks nothing like the original bill. The next hearing will be to require the California Law Revision Committee to study this bill and make a recommendation by 2013. I believe that was also the outcome of the first committee meeting in February 2007, the wheels turn ever so slowly.

Connie Crockett, CALDA Legislative Chair

DID YOU KNOW...

- ◇ Each year 38 million low and moderate income Americans get closed out of the legal justice system. ¹
- ◇ Americans could save \$3.3 billion a year by using Independent Paralegals instead of lawyers to handle routine matters in common legal areas. ²
- ◇ A 2002 American Bar Association survey found that only half of respondents that faced a legal situation in the past year hired a lawyer. The most frequent reasons given for not hiring a lawyer involved high legal fees. ³
- ◇ The main force driving *pro se* litigation is money. For example, attorney fees can range from about \$1,500 for a simple divorce to tens of thousands of dollars for more complex cases. In contrast, the cost of a do-it-yourself divorce typically ranges from \$250 to \$500. ⁴
- ◇ Only one in three Americans say they have a living will, one of the most important documents a person can have because it clearly states a patient's end-of-life wishes.
- ◇ Only 11% of people between the ages of 18 and 34 have drawn up a last will and testament. ⁵
- ◇ Courts in Arizona, California, Maryland, Washington, Utah and other states have developed a range of Web-based legal forms and instructions to help *pro se* litigants fill out forms for divorces, child custody orders and restraining orders. ⁶
- ◇ A recent survey found that the vast majority of California consumers (96%) were satisfied with the quality of their legal document assistant's service and would use an LDA again. ⁷

¹ American Bar Association, *Agenda for Access: The American People and Civil Justice – Final Report on the Implications of Comprehensive Legal Needs Study* (1996).

² *USA Today*, "Public Loses as Lawyers Block Access to Cheap Legal Help" (Feb. 19, 1999).

³ *National Law Journal*, "Polishing the Image" (September 16, 2002).

⁴ Do-it-yourself divorcees get online aid

Lawyers USA, May 8, 2006, NEWS, 1270 words, Nora Lockwood Tooher

⁵ www.findlaw.com, (2001).

⁶ *Lawyers USA*, "Do-it-yourself divorcees get online aid" (May 8, 2006).

⁷ HALT, *Helping Unrepresented Litigants with Legal Documents: Consumer Satisfaction with Legal Document Assistants in California's Bay Area*, (August 2005).

Marcel Neumann, CALDA Vice-President

CONTACT US...CALDA BOARD INFORMATION

PRESIDENT

TINA SANDOVAL
1014 "F" Street
Reedley, CA 93654
Phone: (559) 643-8470
Fax: (559) 643-8470
president@calda.org

VICE PRESIDENT

MARCEL NEUMANN
24301 Southland Drive
Suite 612
Hayward, CA 94545
Phone: (510) 782-6811
Fax: (510) 782-6812
vicepresident@calda.org

SECRETARY

ANNETTE GOMEZ
7710 Limonite Avenue
Suite N
Riverside, CA 92509
Phone: (951) 685-5444
Fax: (951) 685-5498
secretary@calda.org

TREASURER /NOMINATIONS & ELECTIONS

CAROL LUDLOW
20432 Silverado
Suite 5B
Cupertino, CA 95014
Phone: (408) 973-9004
Fax: (408) 973-9191
treasurer@calda.org

MEMBERSHIP

ROBIN SCHUMACHER
1057 "R" Street
Fresno, CA 93721
Phone: (559) 485-5445
Fax: (559) 570-0500
membership@calda.org

CONFERENCE

NANCY NEWLIN
430 Market Street
Suite B
Colusa, CA 95932
Phone: (530) 458-5400
Fax: (530) 458-5544
conference@calda.org

EDUCATION

VANESSA WATSON
4001 Inglewood Avenue
Suite 101-212
Redondo Beach, CA 90278
Phone: (310) 484-3607
Fax: (310) 263-0133
education@calda.org

LEGISLATIVE

CONNIE CROCKETT
307 Spring Street
Suite C
Nevada City, CA 95959
Phone: (530) 265-0192
Fax: (530) 265-0197
legislative@calda.org

PROFESSIONAL STANDARDS

CARL KNOLL
1006 Vine Street
Paso Robles, CA 93446
Phone: (805) 237-7770
Fax: (805) 237-7775
professionalstandards@calda.org

NEWSLETTER

ROBIN WILSON
535 Main Street
Suite 3D
Martinez, CA 94553
Phone: (925) 228-7780
Fax: (925) 226-1950
newsletter@calda.org