



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

**November 2005**

## President's Message

I can't tell you all how honored and excited I am at being given the opportunity to serve as President of such a great association. CALDA is growing rapidly and with each new member comes new ideas and inspirations, which in turn brings even more new members. Thanks should go to all those who have participated in getting new members to join and special thanks should go to Sandy McCarthy and Tamara Parker for their dedication to their organization during the past year. We all benefit from people with their caliber and dedication to our organization.

2006 will be an extra special year as it marks the 20th anniversary of CALDA. I welcome your suggestions as to how we can make this a really memorable year. Please call or e-mail me with your ideas.

There are going to be many exciting things happening in the coming year. We are in the process of revising our Brochures to reflect recent changes in the law. Of particular importance are those changes in the area of Bankruptcy. Steve Elias and Sandy McCarthy have agreed to collaborate on the Bankruptcy brochure and these should be available to the membership very soon. Bankruptcy is not the only area that we are revising, and any members wishing to participate in this task should feel free to contact me. For those new members who are not yet aware of our Brochures, these are a great resource for both the Legal Document Assistant as well as the customer. They enable the customer to direct the Legal Document Assistant through the form preparation process.

We are almost finished with the revisions to our bylaws and these should be mailed to members to vote on very shortly. These revisions are necessary to reflect our changing times, such as the move into the electronic era. I am particularly excited about our forthcoming special Board Meeting to be held on November 12, on the Inland Empire Chapter's chat room. This is the first time a meeting will be held via the Internet, and it will provide members with the opportunity to hear Board discussion from the comfort of their own computer. Information on how to access the chat room has been provided on the forum.

I am particularly happy to announce that I have appointed Andrew Voller to be Legislation Chair. This will take effect on February 2, 2006, when he has been a voting member for one year. I consider this to be an extremely important position and I know that he is going to do a great job.

Once again I would like to thank you all for your support. Let's all work together and make this a really fabulous year.

*Carol Ludlow*  
*President*



**PRESIDENT**  
CAROL LUDLOW  
Phone: (408) 483-0061  
[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**  
BETTY COLE  
Phone: (530) 677-9363  
[Treasurer@Calda.org](mailto:Treasurer@Calda.org)

**PUBLIC RELATIONS**  
MOIRA BOYLE  
Phone: (714) 998-8259  
[PublicRelations@Calda.org](mailto:PublicRelations@Calda.org)

**CONFERENCE**  
NANCY NEWLIN  
Phone: (530) 458-5400  
[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**  
JEANNIE WIERSON  
Phone: (760) 723-3336  
[ProfessionalStandards@Calda.org](mailto:ProfessionalStandards@Calda.org)

**NEWSLETTER**  
DEBBIE DRIVER  
Phone: (530) 243-8720  
[Newsletter@Calda.org](mailto:Newsletter@Calda.org)

**TECHNOLOGY**  
MARCEL NEUMANN  
Phone: (510) 782-6811  
[Technology@Calda.org](mailto:Technology@Calda.org)

**LEGISLATIVE**  
[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**  
SANDY MC CARTHY  
Phone: (805) 985-9588  
[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 Vice President *Connette Blalock*

As past Conference Chair, I never realized how many hours it took to put on a successful conference.

Thanks to all those who assisted in making the 2005 CALDA Conference one to remember! Marcel was a great sport and if you missed his performance, we have pictures! Thanks to all the speakers who volunteered their time to teach us new and refresher classes. My thanks to Connie Crockett who arranged for the vendors, items to sell, tickets for the drawings, prepared the schedule and, in general, assisted me in all facets of the conference.

Thanks to Diana Wade, who obtained the beautiful bags for the conference; Tamara Parker who arranged for the food and accommodations; Betty Cole, who prepared the MCLE credit forms, teacher evaluations, assembled the conference binders, and her husband, John, who tirelessly ran to Kinkos or anywhere else we needed him to go; Robin Schumacher and Jim Wood, who I constantly called to see if we had new members who somehow didn't get registered on the website; and a special thanks to Betty Cleveland and her husband, Jerry, who worked tirelessly, numerous hours again this year at the registration desk, to assist in a smooth registration process.

My goal for this year is to have more seminars in the Southern California area. I would like to see an increase of 50 members this year. We can do it. I am planning two one-day seminars in Southern California, one in January and one in June. I have already contacted some potential speakers and hope to have the first seminar mid-January.

As Inland Empire Chapter President, we have been successful in putting our Inland Empire CALDA brochures in Family Law Facilitators offices in San Bernardino, Victorville, Hemet, and Murrieta. We will be contacting the Family Law Facilitators Offices in Riverside and San Bernardino as well. These brochures have been well received.

We have a new board and I am excited to work with these members to make this year one of CALDA's best years ever. We are already planning the next conference. HINT: Does anyone have a special talent they'd be willing to share

**Connette Blalock**  
**Vice-President**

## Words from the Treasurer *Betty Cole*

I joined CALDA in April 2003 and have been active with the organization since. I served as Education Chair for one year, and was pleased when asked to be on the board as Treasurer of CALDA for the new year. I have worked in the legal field since 1995 and have operated my own LDA business since 2002. I earned her B.S. in Paralegal Studies, from Wesley College, graduating Magna Cum Laude. I am very honored to serve on the board for another year for CALDA, and will do my best in serving as your Treasurer.

**Betty Cole**  
**Treasurer**

Words from our Membership Chair  
*Robin Schumacher*

## NEW CALDA MEMBERS

Yolanda Alvarez, LDA	Fresno County
Marianne Cooper, LDA	San Bernardino County
Vanessa Davis (student) *	Fresno, CA
Elizabeth Rimbault, LDA	Contra Costa County
Charlotte Ruse *	Lake Isabella, CA
Cheryl Patterson, LDA	Shasta County
Holly Sheen, LDA	Sonoma County
Diana Slater, LDA	Ventura County
Valarie Wiley, LDA	Siskiyou County
Robert Peltz, LDA	San Bernardino County
Stanley Ho *	San Francisco, CA
Elizabeth O'Howell, LDA	San Bernardino County

\*exempt from registration

**If these new members are in your area, please give them a call and welcome them to CALDA.**

Newbies – **WE WANT YOU!** If any of you are interested in becoming a part of a committee and helping CALDA with its mission, please give me a call and I will make sure you get hooked up with the right person. My office number is (559)485-5445. Committees available are:

Public Relations  
Education  
Membership  
Technology  
Conference  
Newsletter  
Professional Standards  
Legislation  
Fund Raising  
Nominations and Elections

**Robin Schumacher**  
**Membership**

## Words from our Education Chair

*Robin Wilson*

Hi, I'm Robin Wilson, CALDA's Education Chair. I was asked to chair the Education Board position for the next year term, and was appointed by our President, Carol Ludlow, to complete the position vacated by Betty Cole when she accepted the nomination for the Treasurer office. I look very much forward to the upcoming year. So far, Jolene Dashut and Socorro Vizcaino have volunteered to be on my committee to help me fulfill the duties of this position, and I greatly appreciate their offers of assistance. Of course, I welcome anyone else who would be interested in helping as well.

Like many other Conference attendees, I came back from this year's Annual Conference filled with new ideas on new ways to do my Legal Document business, new areas to pursue such as Evictions and SSDI, as well as having learned about the new Bankruptcy Reform laws and requirements. I heartily encourage all CALDA members to try to set aside the funds to attend next year's conference. Since joining as a student member in 2002, I haven't missed a conference yet, and each time, have learned a new skill, area or process I am able to put to use in my business, which has more than paid for itself within the following year. This, of course, is in addition to all the new friends and acquaintances made during our networking opportunities. It has been a great experience the last three years at Asilomar, which is so beautiful, quiet and peaceful without television or phones other than our cellular phones! I'm always disappointed that the time passes so quickly before another Conference is over, and we have to pack our bags and leave for home.

My goal for the education position during the upcoming year is to offer at least three workshops, one each in Southern, Central and Northern California, so I'm open to hearing feedback from our members as to what you would be interested in. Some topics suggested have been Evictions, QDROs, Judgments (getting your Judgment through), How to Find People, Selling your Business (when you are ready to retire or are moving), Internet Marketing, Websites and Retirement Planning, to name a few. I would like to look into perhaps offering classes via teleconference format, which would alleviate having to find a room/location and which would allow more members to participate in the classes than if they are offered regionally. I would appreciate any thoughts or information any members might have in this regard.

**Robin Wilson**  
**Education**



## Words from our Public Relations Chair

*Moira Boyle*

I am still coming down from my conference high, as it gave me that much needed energy to store up for the LDA Winter Blahs. I was a first timer conference attendee so everything was rather new and exciting. The best part for me was the face to face contact I made with CALDA members, from seeing names on badges of those who were active on the talk list to those who post on our forum.

CALDA's public exposure has already taken its first step by my introduction to the Public Relations contact for the State Bar, all the way to Sacramento where I spoke with the aide to the latest bill that passed giving the State Bar jurisdiction over UPL matters. I take pride in CALDA members, as the tagline for our logo is about Education, Excellence and Ethics. Yes, we as members do hold ourselves out to a higher standard than non-members. We would like members of the State Bar and California's legislators to know that we do conform to State laws. Each member is our own Public Relations representative for CALDA, and our example will set the standards for our profession.

CAPA also know as California Alliance of Paralegal Associations, has taken an interest in working together with CALDA through a collaborative effort of educating the public the differences between Paralegals and Legal Document Assistants. I will be working with Jeannie Wierson our Professional Standards Chair on this project.

My own 74 year old father was golfing recently with his geezers and one of them who wants a divorce said he wants to have a paralegal do it. In fact 3 of the old codgers said, "Para-legals are the way to go." My father stepped in and told these guys, "They are Legal Document Assistants now, not paralegals." It is in itself quite a project getting the record straight between the two professions, educating the public and making those who are unaware, finally aware there is a difference in the profession.

I encourage all CALDA members to add our new logo to your website, and have a link to CALDA's webpage. The new member feature shows just how many hits your web page receives by virtue of CALDA, this in itself shows how valuable membership is because we do get many hits daily.

Once again, I have the pleasure of being on the board of directors as Public Relations Chair and look forward to all the exposure for CALDA.

**Moira Boyle**  
**Public Relations**



## Words from our Fundraising Chair *Connie Crockett*

I'm your re-elected fund raising chair. I served one year in this position and only now do I feel like I know what I'm doing. It's real exciting to see so many new people on board and hear of so many members who would like to volunteer their time to join various committees. We all see the importance of CALDA and the energy is invigorating.

Over this last year I have also worked on an ad hoc committee to revise the bylaws for CALDA so we can enlarge our scope and focus. I hope to continue working on these issues in addition to being your fund raiser. My predecessor, Sandy McCarthy, began the process of creating the CALDA brochures during her fund raising year (with the help of other volunteers!). This project was quite an undertaking and now requires a separate committee to continue the updating process. This tool will hopefully become a steady source of information for CALDA members and provide some income to help pay for the process of updating (each brochure also requires attorney approval).

As your fund raiser chair, I would like to know what your thoughts are in terms of additional aids that will help you market your business and bring something useful to the table. In the past, some of the items that have been sold through fund raising include t-shirts. Many organizations sell hats, mugs, and like items. Although it was my plan to have sweatshirts available for sale at the conference, personally I don't believe these things are instrumental in growing a business. I would love your thoughts on what you believe might grow your business in addition to being functional items that either you or your clients would use. For instance, the brochure racks have been instrumental in drawing in additional business as the clients wait and peruse the contents, realizing they need help in more areas of law or know others who do. I am also working on adding plexiglass holders for these brochure racks which will be made available through the website.

This is your organization. Make your needs be known. I look forward to working in this capacity for two more years.

**Connie Crockett**  
**Fundraising**

## Words from our Technology Chair *Marcel Neumann*

### **GOVERNOR SIGNS BAR-SPONSORED BILL ON PRACTICING LAW WITHOUT A LICENSE**

San Francisco, Governor Arnold Schwarzenegger has signed State Bar-sponsored bill establishing the bar authority to take action against individuals who practice law without a license. The bar-sponsored measure " SB894 by Dunn " tackles unauthorized practice of law, which is a misdemeanor. The new law gives a superior court authority, on its own motion or upon application of the State Bar, to assume jurisdiction of the practice of a person who is not a lawyer. "Long ago the jurisdiction of the State Bar should have reached not only those authorized to practice law, but also those engaged in the unauthorized practice of law, said Dunn. Unfortunately, until the governor's signature on SB 894, the State Bar could not reach those in the latter category. SB 894 closed that gap and completes the jurisdiction of the State Bar over the practice of law," he said. The bar receives more than 100 complaints a year about the unauthorized practice of law, Heiting noted. This law is definitely a step in the right direction in the effort to stem abuses of clients who are victims of unscrupulous individuals posing as attorneys.

Source : The State Bar of California

**Marcel Neumann**  
**Technology**

## Words from Professional Standards

*Jeannie Wierson*

Thank you Carol Ludlow, President of CALDA, for appointing me as Chair to the Professional Standards Committee. I hope I can do you all proud. After review of the files I received, I have concluded that a lot of work needs to be done to get the Professional Standards Committee rolling the way our board by-laws state. In a short time, I have been able to enlist a few members to sit on the committee and will continue to solicit additional members until the seats are filled. I am please to announce our new committee members, April Johnson of "T&H Caseworks," West Covina, CA (Los Angeles County); Mike Conzelman of "Docs-In-The-House," Corona, CA (Riverside County); and Rita Capello of "Rita R. Capello, LDA/Notary," Fresno, CA (Fresno County). Each one of us are anxious to get started.

Our first order of business will be to adopt rules for the committee that are consistent with CALDA's bylaws or with the rules adopted by the Board, to establish a Procedural Manual and to establish duties for each committee member. Some of the duties will include, but are not limited to:

1. Send out letters to non-conforming legal document assistants (LDAs) as they are reported to us;
2. Receive all complaints regarding LDAs and respond in writing according to CALDA procedures;
3. Handle complaints or violations of the Code of Ethical Standards regarding CALDA members;
4. Educate the public and the legal system about what a LDA is and what they can do;
5. Collect current LDA registration lists from each of the 58 county clerks in California;
6. Conduct an annual survey of current LDA registrations on each of the 58 counties in California and supply copies of the LDA registration lists to the CALDA membership chair and president;
7. Communicate with 58 county DAs, as necessary, regarding enforcement of LDA laws;
8. Write an article for each issue of the newsletter, Access, reporting actions of this chair and/or on a subject relating to professional standards;
9. Hold regular Professional Standard Committee meetings (via chat room);
10. Attend all board meetings and annual conference; attend local chapter meetings, if any;
11. Submit board meeting report and annual report for each meeting; and
12. Perform other duties as requested by the CALDA Board.

Anyone interested in joining this committee should contact me at [ProfessionalStandards@calda.org](mailto:ProfessionalStandards@calda.org). Again, thank you for the appointment.

**Jeannie Wierson**  
**Professional Standards**