



CALDA *update*

SETTING THE STANDARD...EDUCATION, ETHICS, EXCELLENCE

Message from the President

Dear Members:

At long last, we've just posted the revised Agenda for our Annual Conference. I believe you'll find year's classes to be fitting for our 30th Anniversary event. We have a few main and important focuses at this year's conference:

STAR INSTRUCTORS

This year, we are featuring our most talented and sought-after instructors in



three main subjects. In particular, Helen Bellamy, LDA is teaching on probate and trust administration. We will benefit from Helen's decades of experience doing our work providing Californians with affordable access to justice.

Back by popular demand is family law attorney Paula Grohs, Esq., who will be co-teaching, with me, Uncontested Divorce from A-Z, in two sections. Paula and I appeared together at a Foster City seminar a few years ago to rave reviews; hopefully we'll impress again.

KEYNOTE SPEAKER

Of particular note is our Keynote Speaker, JULIE SAFFREN, Esq., Professor of Law at Santa Clara University, who has a expertise in domestic violence. Ms. Saffren teaches

Domestic Violence Seminar and Family Law at Santa Clara University School of Law and also does DV presentations for the local Santa Clara County Bar Association, State Bar conference, the AFCC conference which includes court professionals and mental health professionals, and DV agencies.

RELATED SECTIONS

Have you ever felt that a single class on a subject just isn't enough? This year we are putting on sections that are directly related to each other so that both a novices and advanced practitioners can get an immersive experience in the particular subjects.

In particular, note that Helen and Galen are each teaching two sections of their particular subjects. Galen Hammond, LDA, our renowned expert in estate planning, is teaching Introduction to Estate Planning; then he will be followed later in the day by attorney Diana Redding, Esq., an expert in will and trust litigation, who will help us to ensure that our office and intake procedures are spot-on for dealing with hair or contentious will and trust situations. Both beginner and advanced estate planning LDAs will benefit from this combination of classes.

GET YOUR MCLE!

We'll send our detailed information on the speakers shortly. You will also note that this Agenda contains 11.5 units of MCLE – nearly all that is necessary to renew one's registration.

NEW AND EXCITING BUSINESS CLASS

Nancy Newlin, LDA will provide a new take on growing your LDA business. She will discuss growth development, licensing,

advertising, marketing, software purchases, office equipment, and other strategies for managing and growing your business. This class will be available for all of our Friday attendees.

THANK YOU – SEE YOU THERE

I'd like to thank everyone for your patience while you've been waiting for this updated Agenda. I think you'll find it's worth the wait. Please sign up for the Conference without delay to ensure you have a space reserved.

Kind regards,
Ian Duncan
CALDA President

QUICK FACTS

Friday, October 14th

To

Saturday, October 15th, 2016

4 Points Sheraton

4900 Duckhorn Boulevard

Sacramento, CA 95834

916-263-9000

Member fee: \$420.00

Non-member fee: \$575.00

[Complete Details](#)

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2016 Annual Conference

Schedule of Events

Friday, October 14, 2016

7:30 AM to 8:30 AM

Continental Breakfast & Registration

8:45 AM to 9:00 AM

Welcome by CALDA President, Ian Duncan, LDA

9:15 AM – 10:30 AM

TRAINING #1 – Introduction to Social Security Disability Claims (1.25 hours CLE)

Instructor: Diana Wade

This class provides a brief overview of the process of filing SSD claims, the appeal process, and an explanation about the Agency.

Or

TRAINING #2 - Requests for Order (RFO) for Child Custody and Child Support (1.25 hours CLE)

Instructor: Connie Crockett, LDA

The Court retains jurisdiction over child custody and support until that child reaches the age of 18. However, a court cannot enforce this obligation until orders are issued. This often occurs when a party files an RFO to either make orders or modify previous orders. This class provides a brief overview of the process of preparing a RFO.

10:30 AM to 10:45 AM BREAK

11:00 AM – 12:30 PM

TRAINING #3 – Growing Your LDA Business: Structure follows Strategy (1.5 hours CLE)

Instructor: Nancy Newlin, LDA

This class will provide participants with a brief overview of the day to day focus on growth development, licensing, advertising, marketing, software purchases, office equipment and informational pamphlets and/or posters for client purposes

.12:30 PM to 1:30 PM – LUNCH

1:45 PM to 3:15 PM

TRAINING #4 Preparing the Petition for Letters of Administration or Testamentary: (1.5 hours CLE)

Instructor: Helen Bellamy, JD, LDA

This class will begin with an overview of the probate process, and then will focus on preparing the forms and following the procedures for starting an uncontested probate proceeding, and filling out the forms for being appointed as the Administrator or Executor of the estate.

Or

TRAINING #5 - Completing an Uncontested Divorce: Preparing the Petition, Disclosures, Judgment (PART 1):

Instructors: Ian Duncan, LDA and Paula Grohs, Esq.

(1.5 hours CLE)

There are 3 main ways to end a marriage or registered domestic partnership in California: divorce, legal separation, and annulment. It is not necessary for both spouses or domestic partners to agree to end the marriage. California is a “no fault” divorce state, which means that the spouse or domestic partner that is asking for the divorce does not have to prove that the other spouse or domestic partner did something wrong. This class provides a brief overview of the process of filing a divorce, exchanging disclosure documents and finalizing the judgment.

3:15 to 3:30 PM BREAK

3:45 PM– 5:00 PM

TRAINING #6 - Completing an Uncontested Divorce: Preparing an Uncontested Judgment by Agreement (PART 2): (1.25 hours CLE)

Instructors: Ian Duncan, LDA and Paula Grohs, Esq.

Parties can enter into an uncontested divorce by agreement whether or not the respondent has defaulted or filed a response. In the agreement, which is also called a “stipulated judgment,” the parties can both agree to end their marriage or domestic partnership. They can also agree about: how to divide their property and debt; whether anyone will pay the other spousal or partner support; and if children are involved, what child support and custody and visitation orders are wanted.



Or

TRAINING #7 - Completing a Petition for Custody & Support of Minor Children and the Income Withholding Order:

(1.25 hours CLE)

Instructor: Cathy Cowan, JD

This class will show you how to complete the relevant forms to seek custody and child support when the parties are still married, but separated, using California’s free support calculator, and preparing the Income and Withholding Order (IWO).

5:30 PM – 9:00 PM Dinner and Annual General Meeting

Schedule of Events

Saturday, October 4, 2014

7:30 AM to 8:30 AM

Continental Breakfast & Registration

8:45 AM – 10:00 AM

TRAINING #8 - Estate Planning, Introduction: One Way to Avoid Probate: (1.25 hours CLE)

Instructor: Galen Hammond, LDA

Estate planning is the process of anticipating and arranging, during a person’s life, for the management and disposal of that person’s estate during the person’s life and at and after death, while minimizing gift, estate, generation skipping transfer, and income tax. It can avoid probate at death, prevent court control of assets at incapacity and bring all of your assets together into one plan. This class will provide you with an overview of the estate planning documents needed.

Or

TRAINING #9 - Administering a Decedent's Estate (1.25 hours CLE)*Instructor: Helen Bellamy, JD, LDA*

The administrator's job is to (1) administer the estate – i.e., collect and manage assets, file tax returns and pay taxes and debts – and (2) petition the court to distribute any assets or make any distributions of bequests, whether personal or charitable in nature, as the deceased directed (under the provisions of the will). This class provides a brief overview of the process of administering a decedent's estate.

10:00 AM to 10:15 AM BREAK**10:30 AM to 12:00 PM****TRAINING #10 - Domestic Violence Restraining Orders (DVROs):**

(1.5 hours CLE)

Instructor: Florence Bracy of Jenesse Domestic Violence Center, Inglewood Court, Inglewood, CA

A restraining order (also called a "protective order") is a court order that can protect someone from being physically abused, threatened, stalked, or harassed. This can include orders such as personal conduct orders, stay-away orders and move-out orders. Although civil restraining orders can be requested, and are almost identical to family law restraining orders, this will mostly reference family orders but will focus on restraining orders requested through civil court.

OR

TRAINING #11 - Estate Planning, Advanced: Preparing a Plan to Withstand a Will or Trust Contest:

(1.5 hours CLE)

Instructor: Diana Redding, Esq.

Inevitably, some of your estate plans will be contested by a disgruntled heir. Make sure your intake procedures are right-on to ensure your estate plans are likely to withstand challenges. In this class, we would discuss determining capacity; proper intake procedures; "do's and don'ts"; proper signing procedures; when to refer to an attorney for an independent review; and how to support the family's attorney after the Settlor dies and the plan becomes contested.

12:00 PM – 1:00 PM LUNCH**1:15 PM – 3:15 PM****KEYNOTE SPEAKER – JULIE SAFFREN, Professor of Law, Santa Clara University**

(2.0 hours CLE)

Ms. Saffren practices Family Law in Santa Clara County, with a focus on domestic violence issues. A former staff attorney at Support Network for Battered Women, she has practiced at the firms of Schlepfforst & Emede and Hoge, Fenton, Jones & Appel in San Jose. She trains attorneys, judges and mental health professionals on DV issues locally and statewide. She was one of the co-creators of DVLSR (Domestic Violence Limited Scope Representation), a grant-funded collaborative with the Pro Bono Project of Silicon Valley. DVLSR trains and mentors volunteer attorneys and certified law students to represent low-income litigants in civil domestic violence hearings in Santa Clara County Superior Court.

Ms. Saffren has been a member of the Santa Clara County Domestic Violence Council since 2007. Julie is a former member of FLEXCOM, the Executive Committee of the State Bar's Family Law section and a past Editor of the State Bar's Family Law News. In 2009, she co-authored a domestic violence appeal, *In re Marriage of Nadkarni*. The published case expanded the construction of the Domestic Violence Prevention Act by establishing a legal definition for conduct that "disturbs the peace" under Family Code section 6320. Ms. Saffren received her J.D. at Santa Clara University School of Law and her B.S. at Rochester Institute of Technology.

The Conference Committee thanks:**3:15 PM to 3:30 PM BREAK****3:45 PM – 5:00 PM****TRAINING #12 – Preparing an Unlawful Detainer:** (1.25 hours CLE)*Instructor: Richard James Carter, LDA*

A landlord may be able to evict a tenant if the tenant: fails to pay the rent on time; breaks the lease or rental agreement and will not fix the problem (like keeping your cat when pets are not allowed); damages the property bringing down the value (commits "waste");

becomes a serious nuisance by disturbing other tenants and neighbors even after being asked to stop; or uses the property to do something illegal. This class will provide the participant with the overview of the legal process and forms of filing an eviction.

OR

TRAINING #13 - Deeds: Transferring Title Successfully & Properly: (1.25 hours CLE)*Instructor: Debra Burton, LDA*

Learn how to prepare the basic forms needed for transferring title to real property, such as Grant Deeds, Quitclaim Deeds, and Affidavits of Death. In this class, you will learn how to: put real estate in joint tenancy or community property; add or remove someone's name from the title of real estate you own; transfer real estate into, or out of, a revocable living trust; transfer property into a family corporation or partnership; borrow or lend money with real estate as security; use real estate as security for a loan; buy out a co-owner of jointly held real estate.

Great news!

California Notaries got their first raise in more than two decades after Governor Jerry Brown authorized a new \$15 fee cap for acknowledgments and jurats - a 50 percent increase over the state's previous maximum allowable fee for notarial acts.

The fee increase signed into law by Gov. Brown does not take effect until January 1, 2017.

Here's a link to read more:

https://www.nationalnotary.org/notary-bulletin/blog/2016/08/ca-notaries-get-raise-15-fee?utm_campaign=bulletin08232016&utm_medium=email&utm_source=nnabulletin&utm_conte

CHAPTER NEWS – OUR LOCAL CHAPTERS ARE GROWING!



Bay Area Chapter

Please note there will be NO October Meeting, due to the Conference. The next scheduled meeting will be November 17, 2016 and we will discuss the Annual Conference. We meet in the basement conference room of the Southland Square Building at 24301 Southland Drive, Hayward, at noon. If you have questions, you can contact Marcel @ 510-782-6811, Debra @ 209-836-5430 or Jeri @ 650-574-2087.



North Bay Chapter

The next North Bay Chapter (Marin-Sonoma) meeting will be Tuesday, November 1, 2016 from 12:00PM to 1:30PM. The meeting will be at Divorce with Dignity - Marin (Conference Room) 7 Mt. Lassen Drive, Suite A-110 San Rafael, CA 94903

Please RSVP to Carlo Perez at carlo@a1documenthelp.com or Jim Wilroy at jlwlda@comcast.net if you plan to come to the meeting, or for any comments, questions and suggestions, or if you want to be involved in any way to the new North Bay Chapter, please feel free to contact the same.



Los Angeles/Orange Chapter

There will be NO JULY MEETING as we will be hosting the Summer Seminar on Saturday, July 16, 2016. Regular meetings are "bring your own lunch" monthly meetings with Judge Juhas. 111 North Hill Street, **9th Floor Cafeteria**, Los Angeles, CA 90012. Please email Lois Isenberg at lois@divorcesos.com with your RSVPs (registration is a must - 25 attendee limit).



Solano County Chapter

Solano County Chapter will have regular meetings starting next month, November, no longer in Fairfield, but instead at A-1 DOCUMENT HELP, 1626 Tennessee St. Vallejo, CA 94590.

Meetings are held every **SECOND WEDNESDAY OF THE MONTH** at A-1 DOCUMENT HELP, 1626 Tennessee St. Vallejo, CA 94590, from 12:00 to 1:30 pm, unless otherwise noted. RSVP to Carlo Perez, carlo@a1documenthelp.com, tel. 707-656-3212 or Judy Reyes, judy@reyesdocuments.com, tel. 800-921-2756.



Central Valley Chapter

The Chapter meets the third Thursday of the month at the Yosemite Falls Café, 5123 N. Blackstone Avenue, Fresno, CA 93710. Meetings are from 11:30 am to 1:00 pm. For more information you can contact Robin Schumacher robinschumacherlda@gmail.com or Judy Locatelli at judy@judyslegaldocumentservice.com.



5 Cities and San Luis Obispo Chapter

The 5 Cities and SLO Chapter of CALDA will have its first meeting Thursday, July 21, 2016 from 12:00-1:30pm. The topic is Small Business Marketing - Without Breaking the Bank. Mark your calendar today so you can join us. For further information you can contact Tyler Gross-Stuart at (805) 245-3747 or TylerGrossLDA@gmail.com.

Accessing the Forums

Getting There

Log into the Members Only section of the CALDA website and choose **CALDA Community Forums**.

You will need to agree with the **Terms of Use** the first time you enter.

In the left hand column choose **Groups**.

Click on the group **All Active Members**. There are additional 'specialty' groups but All Active Members is the group that most announcements and discussions occur on.

To the right, underlined in green, choose **Join Group** – Once you have joined **All Active Members**, you may **Start a New Discussion**

To Post a Question

Now that you are in All Active Members (or any other group you've joined) you may read through prior posts or post your own question.

Click **Add Discussion** to start a new topic. This is a blue box, on the right side of your screen, midway down. Type in your question, it looks like email, and hit **Submit**.

Join Groups & Edit Your Settings

My Dashboard, on the left of the screen, will allow you to sign up for various content alerts, groups, etc.

Edit My Setting – Top left, under your name, you will find **Edit My Settings** – There is the subset **Notifications**, this is where you will set what you will types of notices you receive and how often you want to be notified. You should be preset to **Daily**. Everything else should be set to **On**.

Setting Your Alerts

My Content Alerts – We've created several categories of content (i.e. Estate Planning, Family Law, Legislation, etc.). You should sign up for an "alert" for every field you want to hear about. If you would like to receive notices as soon as they are posted to a discussion or

It is with a heavy heart and much sadness that I report that Lynne Myers Stein, a longtime member of CALDA passed away. Lynne died peacefully surrounded by her family and friends on May 13, 2016.

Lynne opened Lynne Stein Paralegal Services in 1986 with the desire to help people access the law. Lynne later changed the business name to Lynne Stein Legal Document Assistant and was a staple on Second Street in Livermore, CA for over 28 years.

After opening the paralegal business Lynne joined the California Association of Independent Paralegals (CAIP) in an effort to promote the profession and access to the law for pro per litigants. Seeing Lynne's dedication to the profession, in March 1994 Lois Isenberg, president of CAIP, appointed Lynne to the board of Directors of the association. Lynne went on to serve CAIP for several years, serving as Membership Chair and Secretary. You know those conference minutes we love to receive, give a shout-out of thanks to Lynne for perfecting the format. Lynne was on the front line demanding access to the law for all people. Lynne understood that integrity in business and producing a quality product was the key to gaining respect for the profession.

In business Lynne was giving and worked hard to make sure each customer received her best. Lynne from the beginning specialized in uncontested divorce, wills and trust, simple probates and other area of form preparation. As Lynne's business grew she enlisted the services of Margret Fazio and then Betty Cleveland. Lynne's further increased the business by adding other services and became an expert on joinders, living trust preparation, and drafting qualified domestic relations orders (QDRO). Lynne was a notary and a frequent teacher at the CALDA Annual Conference. Lynne taught classes on stepparent adoption and living trust. Toward the end of Lynne's career she became the go-to for teaching CALDA members the in-and-out of QDROs. Lynne loved to teach and was always prepared with great information. Lynne was so full of knowledge and always willing to share that knowledge with fellow CALDA members.

Lynne had a great sense of humor and never allowed the issues affecting the paralegal profession to cloud the mission, delivering a



Lynn Myers Stein
Longtime LDA and
CALDA Member

quality product to the consumer at an affordable price. If your birthday made it onto Lynne's calendar you could count on receiving a handwritten birthday card every year. Letter writing was a passion of Lynne's and she sent cards and gifts out every year. Lynne's heart was full of generosity. Raise your hand if you received a personal gift from Lynne. Giving was second nature and she possessed the gift of hospitality, making others feel welcome spelled Lynne.



Lynne was loved by her customers as evident by these testimonials:

Anna L. 04/21/10 said "Lynne helped us craft our Living Trust. She is extremely professional, knowledgeable and helpful. I would recommend her services without hesitation."

Kristal S. 05/26/10 said "Lynne Stein, Margaret and Betty are absolutely fabulous. Lynne is as smart and professional as they come. I would HIGHLY recommend using Lynne Stein. Her fees are extremely reasonable for the high quality that you get from her."

Lynne retired and closed her business in 2014. She was greatly loved by the Livermore community and the community lost a gem of a business when she closed.

Lynne leaves to carry on her legacy John D. Stein, her husband of over 47 years, her children Steffi Kelly, David Stein, and Michelle Stein Purvis; her daughter-in-law Anna Brodsky Stein, her son-in-law Brian Purvis, and her grandchildren Brandon Crews, Joel Stein, Isaac Stein, Ella Purvis and Aaron Purvis.

Lynne we the members of CALDA will greatly miss you. You left us too soon, but you left us with an established legacy and when we grow up we want be just like you.

Helen M. Bellamy, JD, LDA

The Benefits of CALDA Membership

By Debra Hollis
Professional Standards Chairperson

October is that time of year when CALDA members look forward to the annual conference. This year, it is being held October 14-15 in Sacramento. The new, revised agenda has exciting classes. Being a member of CALDA offers you a discount in the cost for attending the conference. Membership also offers so many other important benefits.

You have access to our forum, where you can ask any question regarding a case or potential case, and have other members respond with their views or experiences. You get your business listed on our website.

The CALDA website has an on line library, where you can use NOLO books for assisting with many things including divorce, custody and support, Small Claims, Guardianship and many more. We also have brochures and questionnaires that are attorney approved and provided for our members use. You will get 15% off of Nolo Press Publications

There is an attorney referral list, which is a list of LDA-friendly attorneys that we can use to refer our clients to if they need advice or representation. There are chapters of CALDA that hold regular meetings/classes.

CALDA offers quality education that is now a requirement for registering or renewing a registration. We have a Member Match Mentoring program.

But probably the most valuable benefit of being a member of CALDA is the

camaraderie of our members, and the networking opportunities.

Don't miss these great benefits. Register for the annual conference at www.calda.org. You won't be sorry you attended when you meet other LDAs, form lasting friendships, network with others, and get quality education in a friendly learning environment.

MEMBERSHIP

Welcome New Members

Ingrid Adkins	Barbara McRae
Angela Aguiar	Steve Miller
Barry Aksoy	Carla Navarro
Helene Armand	Sandra Navarro
Sandra Lee Boucher	Al Parsad
Larry DeBose	Melissa Popham
Laura Dodd	Rose Quarels
Euan Fernsler	Maria Rench
Monique L. Fisher	Alana Reyes
Marina Foster	Barbara H. Reynolds
Marian Gorman	Isaac Rodriguez
Jacqueline Greene	Leticia Rodriguez
Angela Grijalva	Reynaldo Rodriguez
Dr. Jay B. Gritzner	Valerie Romero
Diane Gunn	Mary L. Shaffer
Andres L. Helm	Patricia Shelvin
Nereyda Hernandez	Tina Sholes
Catherine Herzog, J.D.	Jennifer Smith
Karen Hovanessian	Sharon Toma
Kristal Keith	Eva Dolores Villa
Tammy K. Levi	Elaine Lee Wood
Carol Marchant	
Calle McKee	

Congratulations

**ANN
SNYDER**

Lifetime
Member