

# CALDA *update*

SETTING THE STANDARD...EDUCATION, ETHICS, EXCELLENCE

## Message from the President

Dear CALDA Members:

First I want to thank the association for allowing me to serve as President and be a part of an organization that not only gives knowledge back but allows friendships to be created within the industry. I am following the footsteps of some great leaders in the industry. This organization was formed back in the 1990's and the individuals who formed this association were motivated and persistent in pursuing a goal of success for California Association of Legal Assistants.



This next two years becomes a challenge for our board as they continue to develop classes that reflect our industry and become beneficial to our members.

Several opportunities will be available throughout the year to meet for education as well as networking with individuals within our industry. I have been a part of the CALDA for many years and networking personally has allowed several opportunities to come my way that might not have been recognized. Networking is a part of our industry and this organization has its wealth of knowledge and from this, long term

relationships have been created with CALDA members and they are priceless.

For our current members and perspective members I want to assure you that the intention of this board is to grow CALDA. We will stay focused on remaining as a benefit to our members and also stay current with this expanding industry's standards and requirements. I look forward to a productive successful year and invite each of you to participate, and most important become involved.

Best Regards,  
Nancy L. Newlin

### SPRING SEMINAR QUICK FACTS

#### *A Day of Family Law*

Saturday, April 21, 2018

Early Bird Rate (through April 10, 2018)  
Members \$145.00/Non-Members \$175.00  
Regular Rate (after April 10, 2018)  
Members \$175.00/Non-Members \$205.00

Elks Lodge  
2840 Soscol Avenue  
Napa, CA 94558

Family Law Panel Discussion with Santa Clara County Court Comm. Ed Mills, Michele Brent and Carla Sprugasci

Judge Towery on Family Law and Prosecutor Karyn Towery on Northern California Innocence Project

Afternoon MCLE classes coming soon

Includes breakfast, lunch, electronic materials and MCLE

**REGISTER NOW!**

## News You Can Use

Legal Update:

Effective 01/01/2018 - [Senate Bill 2](#)  
**\$75 Additional Recording Fees**

SB2 would affect all properties, except owner occupied residences. That includes applying the \$75 fee to rental properties, raw land, vacation homes and commercial properties. LDAs doing estate planning, probate, family law, and general deed work should check with the county recorders for fee requirements. If a cover page is required, it is charged a recording fee as an extra page. Many counties are stamping deeds with the appropriate exemption if you walk in the deed for recording. You can type the exemption on the face of the deed to avoid the extra page fee. Attached is a sample SB2 Exemption Cover Sheet that lists the exemption reasons.

Effective 01/01/2018 - [Senate Bill 179](#)

A New Gender Identity California became the first state in the nation to pass a law allowing the choice of a third "nonbinary" gender option on driver's licenses, ID cards and birth certificates.

Beginning in September, people will be able to file petitions with their local court to make the change, removing a previous requirement that a doctor give proof of gender transition treatment.

Continued on page 2

Last summer, both Oregon and Washington, D.C. began allowing residents to choose a gender-neutral option on driver's licenses.

#### LDA BPC 6400 et seq. Highlight:

Are you providing the required oral statement in the first contact with a prospective client?

#### BPC §6410.5.

(4) The statement: **"I am not an attorney"** and, if the person offering legal document assistant or unlawful detainer assistant services is a partnership or a corporation, or uses a fictitious business name, "[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."

(Amended by Stats. 2016, Ch. 86, Sec. 11. (SB 1171) Effective January 1, 2017.)

## Mentorship Program

By Cindy Elwell

We're implementing a mentorship program to help our new members get acclimated to CALDA and be successful in building their LDA businesses. So I'm asking for your help if you have a successful LDA business and would be willing to give back just a little. Remember what it was like when you first started and when you first joined CALDA? I think you'll agree with me that it's quite a journey, but VERY rewarding. Well, we are getting lots of new members who are just starting their businesses and need some support. It takes very little time; about ½ hour a month when you talk to them on the phone and see where they are at in starting their business. Your mission is to help them figure out what they need to do to build their LDA business and utilize CALDA's resources by focusing on the following:

- What goals they need to set?
- How will they be held accountable?
- How will they measure their success and at what intervals?
- How CALDA can help them

How the process works:

- For one year, meet by telephone or computer once a month for 30 minutes
- Set goals at the end of each meeting for the mentee
- Focus on showing the mentee how to use CALDA resources and become involved in their local chapter, if applicable
- Help in directing the mentee towards building their successful LDA practice

***This is not a place to show the mentee how to do the forms and actual work to learn their area of practice, but to point them to resources to help them build their skills and expertise.***

We all need some help and I know we have a lot of very experienced LDA's in our organization, who want to help but don't have a lot of time. This is your perfect opportunity to support CALDA and help our members thrive. Please let me know if you would like to consider doing this by emailing me at: [membership@calda.org](mailto:membership@calda.org).

We currently have 257 members and an average of 5 new members a month. We are also looking for ways to grow our membership, so if you have any ideas, please let me know.

#### WELCOME NEW MEMBERS

### Student Members

Angelique Barboa  
Pamela Dalton  
Carmen Leon  
Heather Roman

### Voting Members

Anne Gealta  
Barbara Gottlieb  
Lisa Mendez  
Edith Pomposo  
Jessica Ward  
Jennifer Zhu

## Education News

By Rob Van Steen

To do your job legally, you need MCLE credits. It's the "L" in the "Legal" part of your title. One way, and I have honestly not looked, but maybe the only way? And, in my opinion the best way to obtain these MCLE credits is through CALDA webinars, seminars and the annual conference. So, take a break. Take the time to attend these, it's healthy to get yourself out of the office occasionally. Be realistic about your expectations and come in with an open mind. Be prepared to learn from not only the presenters at the event,

*"Be prepared to learn from not only the presenters at the event, but also from the other LDAs at your table."*

but also from the other LDAs at your table.

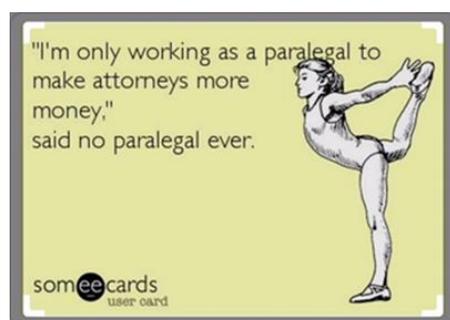
Set expectations. We, on the board, all run our own businesses and volunteer to hold these events only to fulfill the mission of CALDA, to provide education to our members. As volunteers, we do the best we can and are committed to continuously improve these events. But look at the curriculum of the particular event or presentation at a conference and come in with some goals. What do you want to learn? Are you looking to learn about and expand your business with a new service offering, probate, divorces, trust preparation, etc.? Or are you providing a service and need that extra boost in confidence knowing you are doing it right?

Continued on page 3

Soak it all in. Come in with very specific questions you want answered and work to get your answers from the presenters themselves (pin them down with questions, they are there to teach you) or from an expert LDA you are sitting next to. You pay to attend these events, take it upon yourself to get your money's worth.

Enjoy. Make a road trip out of it, get out of the office for a while. Take the family, or not, if you need that break too. Many of these events are held in Northern California only because all of the board of directors are from here, as much as we've tried to recruit from SOCAL. If you are interested by the way, contact someone from the board. We would love to talk to you. But enjoy yourself. It's just beautiful here.

So, respond to surveys you will be receiving from CALDA to help us improve. Get involved, make a difference, join us on the board. Come join us for some moral support and soak it up but enjoy the overall experience of it all. We will be in SOCAL in October for the conference! We look forward to seeing you.



## My Experience as a CALDA Board Member

By Elizabeth (Liz) Fleischer

I have been a member of CALDA since October, 2006, and I initially joined as a student member and then I won a scholarship to attend my second conference in 2007 during my first year of my membership. Then in 2008, I became a Registered and Bonded Legal Document Assistant and opened A Legal Bridge

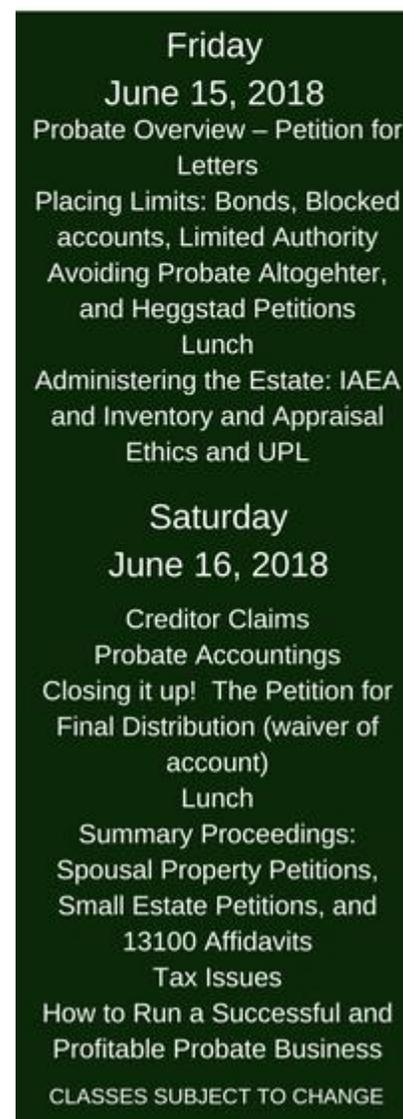
Attorney Support and Self Help Center in Chico, where I assist self-represented litigants as an LDA and I assist Attorneys with their caseloads as a Paralegal.

Prior to my membership with CALDA and LDA registration, I worked as a Legal Secretary for Legal Services of Northern California, a Legal Aid office that is funded by the State of California, and I worked as a Library Assistant for the Butte County Law Library. And during the 1990's, I worked as an Evening Supervisor for Catalyst Women's Advocates, a shelter for those impacted by Domestic Violence where I assisted clients with Temporary Restraining Orders, and I also worked for Parent Education Network, a Court Referred Social Service Agency, as a Child Care Provider where I worked with children considered to be at risk for Abuse and Neglect. Then, in August, 2001, I began the Legal Assistant (Paralegal) Program at Shasta College in Redding, and graduated in May, 2004.

In January 2012 just after the passing of Steve Elias, who was one of CALDA's supervising Attorney's, I was appointed to the Board by the then President of CALDA, Carl Knoll, as the Fundraising Chair where I worked closely with the Treasurer and sold Disclaimer Plaques, Flowcharts, Mouse pads and Pens. And as a Board member from 2012 through 2017 with two subsequent re-elections to the Board by the membership, I assisted with many other functions too; including the implementation of the Elias Attorney Referral Network in honor of Steve Elias where CALDA members could access LDA friendly Attorneys for their clients. I also assisted in the updating of the CALDA Brochures and Questionnaires as the Publications Chair. Then as the Conference Chair, I oversaw the putting on of two CALDA Conferences that were held in first Southern and then in Northern California. And lastly, as the newly formed Events Chair, I worked closely with the CALDA Administrator assisting with our other events and created the initial Policies and Procedures Manual derived from the recommendations of the Events Task Force Committee that had been formed due to the implementation of the 2016 new law (AB 285) that required Registered and Bonded LDA's to have 15 MCLE credits every two years.

I enjoyed my time as a Board Member of CALDA and have continued in my CALDA membership as many others have, who have come on and off the Board. It was a lot of work, but it was also rewarding work to see

that our profession continues to prosper, so that those who need low cost Legal Document Assistant services can continue to have them.



# Meet the Board

## CALDA 2017-2018 BOARD OF DIRECTORS:



PRESIDENT  
NANCY NEWLIN  
Phone: (530) 458-5400  
[nnewlin@frontiernet.net](mailto:nnewlin@frontiernet.net)



VICE PRESIDENT  
CONNIE CROCKETT, LDA  
SOS  
Phone: 530 265-0192  
[connie@soslda.com](mailto:connie@soslda.com)



SECRETARY  
JEANNIE BRUINS  
Bruins Legal Document Preparation  
Phone: (916) 532-3373  
[jeannie@bmsch.com](mailto:jeannie@bmsch.com)



TREASURER  
CAROL LUDLOW  
(408) 973-9004  
[carol@legaldocs4u.net](mailto:carol@legaldocs4u.net)

### CALDA Committee Members:



LEGISLATIVE CHAIR  
JIM WILROY  
Affordable Estate Documents  
Phone: (415) 883-9594  
[jwLDA@comcast.net](mailto:jwLDA@comcast.net)



EVENTS CHAIR  
ROBERT VAN STEEN



EDUCATION CHAIR  
CARLO PEREZ  
707-656-3212  
[carlo@a1documenthelp.com](mailto:carlo@a1documenthelp.com)



PROFESSIONAL STANDARDS  
DEBRA HOLLIS  
Phone: (209) 836-5430  
[debbieh624@aol.com](mailto:debbieh624@aol.com)



MEMBERSHIP CHAIR  
CINDY ELWELL  
Divorce With Dignity Network  
(415) 521-5696



NEWSLETTER CHAIR  
ANGELA GRIJALVA  
Legal Document Preparers  
(916) 750-0073  
[angela@saclegalprep.com](mailto:angela@saclegalprep.com)

## Starting a Chartered CALDA Chapter

Are you interested in starting a CALDA Chapter in your Area? Here are the basic requirements:

1. At least five potential chapter members are required for an application.
2. The organizer of the Chapter will be a CALDA member in good standing for at least one year preceding submission of the application.
3. The Executive Board (or the full Board if the application was so referred) will consider all applications for approval and shall take any factors into consideration they deem relevant and reserves the right to deny any application at its sole and absolute discretion.
4. After chartering, the Chapter shall meet regularly at least one time per month. The Chapter shall hold an election to name officers at its first meeting: president, secretary, treasurer.
5. The secretary of the Chapter shall keep minutes of each regular meeting. The minutes shall be submitted to CALDA's secretary monthly, within 30 days of each preceding meeting.
6. The president of the Chapter shall submit a quarterly progress report to the Board as to how the chapter is effectively furthering the Mission and ideals of CALDA. Said progress report shall be due at least 10 days prior to regularly scheduled CALDA Board meetings.

### CHAPTER NEWS – OUR LOCAL CHAPTERS ARE GROWING!



#### Bay Area Chapter

The Bay Area Chapter meets at conference room at the Southland Square Building at 24301 Southland Drive in Hayward. The date is always the 3rd Thursday of each month, except at the December meeting.



#### Capital City Chapter

The Capital City Chapter meets on the third Thursday of the month. Upcoming speakers and topics included:

- 3/15 – Attorney William L. Porter will present on Construction Collections
- TBD – Placer County Public Law Librarian Diane (Huijgen) Huygen subject TBD
- TBD - Attorney Gary Link will present on Unlawful Detainers
- TBD - Sac County Assistant PJ David W. Abbott will present on UPL
- TBD – LDA Jim Hildreth will present on SB2, TOD, & Real Estate Mediation



#### Central Valley Chapter

The Central Valley Chapter meets on the third Thursday of the month. Upcoming speakers include:

3/15 - Attorney Todd Armas will speak on Evictions  
4/19 - Attorney Michael Buettner will speak on Probate  
5/17 - Attorney Robert Abrams will be speak on Civil/ADA

We will be meeting at the Yosemite Falls Café, 5123 N. Blackstone Avenue, Fresno, CA 93710



#### Los Angeles/Orange Chapter

The April 2017 meeting date with Judge Juhas has been changed from April 20 (the 3rd Friday) to April 27 (the 4th Friday). The Los Angeles/Orange County chapter meets monthly with Judge Juhas in his courtroom (12:15 PM – 1:15 PM), in Department 64 on the 6th floor at the Stanley Mosk (Central) Courthouse located at 111 North Hill Street, Los Angeles, CA 90012. PLEASE NOTE: All meetings take place on the 3rd Friday of each month, unless otherwise noted in the online schedule. If you are interested in attending, please email your RSVP to either Lois Isenberg at lois@divorcesos.com, or Galen Hammond at galen@grhdocs.com (registration is a must - 25 attendee limit).



#### Solano County Chapter

Chapter meetings are held the second Friday of the month from 12:00 noon to 1:30 pm at A-1 Document Help, 1626 Tennessee Street in Vallejo. .