



# CALDA *update*

SETTING THE STANDARD...EDUCATION, ETHICS, EXCELLENCE

## Message from the President

Dear CALDA Members:

Last Saturday, March 21, I had the great honor and privilege of representing CALDA at the memorial service of CALDA co-founder Catherine Elias-Jermany in Kelseyville. It was very nice to see that, as with Steve's memorial service three years ago, the whole town came out to express their love and appreciation for Catherine and her life's work of helping those in need. Catherine and Steve were very active in their local Lake County community and served Lakeport's local community radio station KPZ 88.1 FM.



A long-time civil rights advocate and legal specialist, Catherine Elias worked in the areas of welfare rights, paralegal training, development of self-help law and other consumer materials, and education programs for youth and the public. She was executive director of the National Self-Help Law

Project, Founder of the National Association for Independent Paralegals, and associate director of the National Bankruptcy Law

Project. She also co-authored Nolo Press' Independent Paralegal's Handbook and wrote numerous articles, handbooks and training programs.

Beloved by CALDA members (who usually referred to her as "Mother"), she will be greatly missed. I remember her and Steve at the very first CALDA event I attended, perhaps in 2008 or 2009 on a rainy day in Foster City. I remember she gave the room one of her memorable quotes – "All money ain't good money" – which sums up in a phrase the need always to balance the consumer's interests with your own when assisting clients, which works to everyone's benefit.

Thanks everyone,

Ian Duncan

CALDA President

education. Attendees will earn 1.5 hours CLE credit per class. Topics include:

Training #704 *Essentials of Funding Living Trusts and Preparing and Filing a Heggstad Petition* presented by Ian Duncan. Half the class will be on funding a trust and the other half will be on Heggstad.

Training #114 *Advanced Family Law Motions and Ex-Parte Motions* – Form Preparation and Filing presented by Carla Sprugasci.

Training #904 *Ethics and LDA Practice* presented by Kerry Spence. One hour on working with an attorney consultant and 30 minutes on Ethics-related role plays.

Training #109 *Preparing Joinders and Creating a Qualified Domestic Relations Order (QDRO)* presented by Cindy Elwell

## Spring Fever

### 2015 Spring Seminar

The 2015 Spring Seminar is fast approaching and we have a terrific line up of classes. This event is designed to provide information to prospective LDAs, non-CALDA registered LDAs, non-registered LDAs, Legal Secretaries and pro pers who are looking for assistance in representing themselves.

This year's Spring Seminar is a full day event and will take place on Saturday, April 18, 2015 at The Vibe in Foster City.

Registration begins at 8:30am followed by a full line up of terrific continuing legal



THE VIBE  
670 Shell Boulevard  
Foster City, CA 94404

Saturday, April 18, 2015  
The conference fee includes a continental breakfast, classes, materials and lunch. Cost is \$100.00 for Members and \$105.00 for non-members.

## MEMBERSHIP

## Welcome New Members

Angela Angelovic  
 Myrna Chavarria  
 Joe D. Lowell  
 Laura Mendez  
 James Frederick Polk  
 Your Legal Clinic



*Log in online to access CLE whenever and wherever it's convenient for you.*

## GET CONNECTED

## CALDA is on Facebook



Just click on the link above and join us on Facebook.

## CALDA Chapters

CALDA currently has three active chapters. They are the Bay Area Chapter, the Central Valley Chapter and the Los Angeles Chapter.

If you're interested in starting a chapter in your area please read the [Chapter Guidelines](#) on the CALDA website and follow those instructions.

Areas with strong potential are San Diego, California's Central Coast, Sacramento and Foothills, Upper Northern California.

Please contact CALDA's Vice President, Carl Knoll, at [carl@wehelpyoulegal.com](mailto:carl@wehelpyoulegal.com) for additional information on how to establish a CALDA Chapter in your area.

## CALDA's Continuing Legal Education is Online

Your membership in The Association gives you access to relevant, ongoing Continuing Legal Education. The CLE that CALDA offers is created for LDAs and taught, primarily, by LDAs. CALDA Membership requires that each member participate in Continuing Education by completing 15 units of CLE every 2 years, which shall include 5 hours of UPL/Ethics as adopted by the Membership November 3, 2001.

Currently our online Continuing Education section offers several features. There are four sections:

- 1) Procedures & Requirements – This section covers the ways in which a member may earn their CLE. These include:
  - a. Class Attendance
  - b. Speaking, Teaching and Guest Lecturing
  - c. Published Articles
  - d. Self-Help Materials, Books and Computer Programs
  - e. Subscriptions
  - f. Chapter Meetings
  - g. Quizzes
- 2) CLE Log – A downloadable log to keep track of your CLE.
- 3) Class Recordings and Affirmation – Flyer, MP3 Recording and Materials for previous CALDA CLE. Topics Include:
  - a. Social Security Disability Advocates
  - b. Unauthorized Practice of Law
  - c. Navigating the CALDA Website

- d. How to Prepare a Chapter 7 Bankruptcy
- e. Assets & Aging

Plus many more recordings.

- 4) Quizzes – CALDA offers quizzes that can be taken and submitted for CE credit. Topics include:
  - a. Bankruptcy
  - b. Separation & Divorce
  - c. Marriage
  - d. Parents & Children
  - e. Foster Care & Adoption
  - f. Contracts
  - g. Government Support
  - h. Settling Disputes
  - i. Housing & the Consumer
  - j. Cars & the Consumer
  - k. Becoming a Smart Consumer
  - l. Negligence
  - m. Lawyers
  - n. Lawmaking
  - o. The Court System

Please take a few minutes and review the Continuing Legal Education section of the CALDA website. It's one of the many benefits of membership.



## CHAPTER NEWS



### Bay Area Chapter

The next Bay Area Chapter meeting will be SATURDAY, April 18, 2015. It will be in the conference room at the **Southland Square Building at 24301 Southland Drive in Hayward**. Marcel Neumann will be talking about Status Only Judgments. The date is always the 3rd Thursday of each month, except at the December meeting.



### Central Valley Chapter

The Central Valley Chapter meets on the 3<sup>rd</sup> Thursday of each month at the Yosemite Falls Cafe (new location!) 5123 N. Blackstone, Fresno, CA. Upcoming topics: 4/16/15 - Unlawful Detainers, Pete Russo, Attorney = 1 unit MCLE  
5/21/15 - Default Dissolution, Yolanda Alvarez, LDA & Robin Schumacher, LDA = 1 unit MCLE  
6/18/15 - Topic TBA



### Los Angeles/Orange Chapter

The next meeting of the Los Angeles/Orange Chapter is April 17, 2015. This is a "bring your own lunch" monthly meeting with Judge Juhas. Please email Lois Isenberg at [lois@divorcesos.com](mailto:lois@divorcesos.com) with your RSVPs (registration is a must - 25 attendee limit). Meetings are held every 3<sup>rd</sup> Friday of the month.

# Calendar of Events



*Lobby of the beautiful Holiday Inn at LAX in Los Angeles*

### SUMMER SEMINAR

Save the date! The CALDA-LA/Orange Chapter is very excited to be hosting CALDA's 3<sup>rd</sup> Annual Summer Seminar Series.

We have an awesome line-up of speakers and interesting class topics.

The seminar will be held on:

**Saturday, July 18, 2015**  
**Courtyard by Marriott**  
**6333 Bristol Parkway**  
**Culver City, CA 90230**

We will be presenting four 90-minute MCLE classes. Additional information, including an agenda, class topics, speakers and registration details is forthcoming.

Yours truly,

CALDA-LA/Orange Seminar Committee

### OCTOBER CONFERENCE NEWS

The October Conference will be here before we know it, with many great classes (and MCLE credits) along with opportunities for networking and eating great food!

There will also be a class on the logistics involved with running a business as an LDA and a class on the ethics involved with the LDA profession.

This year it will be held in Los Angeles by the LAX airport, which will make getting there for those flying in very convenient.

The dates are October 16 and 17<sup>th</sup> at the:

Holiday Inn Los Angeles Airport  
9901 S. La Cienega Blvd.  
Los Angeles, CA 94405  
(310) 649-5151

To make reservations, just call the hotel at the above referenced number and ask for In-House reservations and the CALDA rate, which is \$119/per night plus tax. Early bird fees for the conference are:

Members- \$350.00 through August 1, 2015  
Non members - \$400.00 through August 1, 2015

Please make checks payable to "CALDA" and they can be sent to:

Carol Ludlow-CALDA Treasurer  
20432 Silverado, Suite 5B  
Cupertino, California 95014

So save the dates on your Calendars, and we'll see you at the Conference!

Elizabeth Fleischer  
Conference Chair

# Central Valley Chapter

All members of the legal community are invited:

**Thursday, March 19, 2015**

11:30 am to 1:00 pm

**Yosemite Falls Cafe (new location!)**

5123 N. Blackstone, Fresno, CA

**No host lunch available – Business card drawing – Please RSVP - \$7 for non-members**

The CALDA Central Valley Chapter meets on the 3rd Thursday of each month for continuing education and networking. MCLE credits are available at most meetings.

## **Remaining 2015 Meetings\*:**

04-16-2015 – Topic: Unlawful Detainers, Pete Russo, Attorney = 1 unit MCLE

05-21-2015 - Topic: Default Dissolution, Yolanda Alvarez, LDA & Robin Schumacher, LDA = 1 unit MCLE

06-18-2015 - Topic: TBA

07-16-2015 – Group Field trip to Bay Area Chapter Meeting via Amtrack = 1 unit MCLE

August no meeting

09-17-2015 - Topic: Trusts, Wills, Advance Health Care Directives, Teresa Petty, Attorney = 1 unit MCLE

10-15-2015 - Topic: Exparte Custody Requests – Robin Schumacher = 1 unit MCLE

11-19-2015 – Sharing of information from CALDA's annual conference = 1 unit MCLE

12-17-2015 – Holiday Get-Together

\*Content may be subject to change due to scheduling. If changes are to be made, members shall be notified in a reasonable amount of time prior to the meeting.

The California Association of Legal Document Assistants was established in August 1986, and was formerly known as "California Association of independent Paralegals" (CAIP). CALDA is the time-honored organization for legal document preparation professionals and supporters of this profession. CALDA promotes and encourages high standards of ethical and professional conduct while offering its members educational opportunities, professional alliance, a website business listing, member forum exchange, and attorney approved printed brochure materials. Commitment is given to increasing public access to the legal system and CALDA recognizes the Legal Document Assistant's professional responsibilities to the public, to the legal system, and to colleagues. CALDA is a Nonprofit Mutual Benefit 501(c)6 Corporation. CALDA is a California State Bar approved MCLE provider.

RSVP: Robin Schumacher (559)485-5445 or Judy Locatelli (559)395-4640  
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