



# CALDA *update*

SETTING THE STANDARD...EDUCATION, ETHICS, EXCELLENCE

## Message from the President

Dear Members:

Last week I went to this: <http://laaonline.org/ModelApproachesStatewideMeetingSanFrancisco>

It was primarily focused on Elder services, elder abuse, and elder abuse restraining orders. I was invited so that I could see how other more influential groups put on trainings.



It was a good experience for me, and it helped to inform how we should plan CALDA's activities in 2015. So I thought I would take this opportunity to let you know what we're planning for 2015.

CALDA is an odd hybrid: We're a mutual-benefit association (i.e. we serve our dues-paying members), so we have an obligation to put on worthwhile events for our members, and we charge for those events to cover expenses.

But by the very nature of our work, we're also providers of legal access and so therefore we must look beyond ourselves and outside our own world. We need to do this in order to appeal to other similar providers of legal

access, such as providers of services to seniors, disability rights groups, domestic violence prevention and support organizations, and others.

We need to establish relationships with those groups, because they have more clout and credibility than we currently do. These groups propose legislation, and that legislation gets passed by the Legislature and signed by the Governor. We desperately need to join this community of providers. We're not disliked - but we are invisible, and this is dangerous for the health of our profession.

But how can we invite these other influential groups to our current set of activities, which we charge for? Picture the invitation: "Hello! We're so happy to meet you. Please pay \$325 to come and meet us." Would anyone do that? No.

The answer is to offer a new selection of free events in addition to our current offerings. These new free events will attract these other service providers to CALDA by showing off our expertise in teaching legal forms and procedures, and by leading discussions on the role Legal Document Assistants can play in providing legal access to the core constituencies of these groups. Our goal is to show them how invaluable we are to them.

I can picture a number of different possible trainings:

(1) January or February Event on Disability Legal Issues:

Purpose: To introduce groups like Disability Rights California and other Autism Groups to Legal Document Assistants

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## Los Angeles Summer Seminar

July 26, 2014

Space is Limited!

Register today at [www.calda.org](http://www.calda.org)

Complete Details Page 2



Member  
Resources

## Updated CALDA logos

The CALDA logo is available in several formats for your use on letterhead, websites, etc. Log in to the members only section and choose from JPG, EPS, AI, and TIF.

# Sizzling Summer Seminar Series in Los Angeles

CALDA Presents Its: 2014 Summer Seminar Series hosted by the CALDA-LA/Orange Chapter. Fee includes continental breakfast buffet, boxed lunch and handouts.

## Schedule of Events

### Registration 8:00 a.m.

### Morning Schedule

9:00 AM to 10:30 AM

*Probate: Section 301 – Form Preparation For The Petition For Letters Of Administration / Testamentary* (1.5 hours CLE)

10:45 AM to 11:15 AM

*Guardianship: Section 401 - Form Preparation on Guardianship of a Minor Child* (0.5 hour CLE)

11:15 AM to 12:15 PM

*Family Law: Section 107 - How To Prepare Applications For Publication And Applications For Posting* (1.0 hour CLE)

12:15 PM to 1:15 PM

Lunch

### Afternoon Schedule

1:30 PM to 3:00 PM

*Family Law: Section 113 - Steps On How Your Client Can Seek Grandparent Rights And Visitation By Filing A Request For Order or Joinder To A Case* (1.5 hours CLE)

3:15 PM to 4:45 PM

*Family Law: Roundtable Discussion On Family Law Forms* (1.5 hours CLE)



### QUICK FACTS

Saturday, July 26, 2014

Courtyard by Marriott, 6333 Bristol Parkway, Culver City, CA 90230

(310) 484-7000

Early bird member fee: \$85.00

Early bird non-member fee: \$100.00

After July 6, 2014 - \$100.00/\$115.00

Parking \$8.00

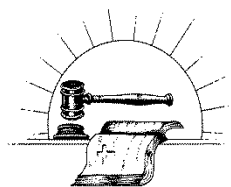
# Fall Conference

by Julie LaBlanc

CALDA's 28th annual conference is scheduled for October 3rd and 4th in Burlingame, California. The conference this year will offer a great selection of courses and highlight a variety of vendors including, Helen Bellamy from Judicial Self Help Center, Dennis Fox from Fore Trust Software, and Clifford Wiens from Pennbrook Insurance Services. Be sure to look for these three vendors.

Helen M. Bellamy is the steward of **Judicial Self Help Center** and is introducing a new concept: small group direct education to the legal consumer. Under the umbrella of "Set Your House In Order" after the LDA

completes the paperwork for a Statutory Will or Revocable Living Trust the consumer is left with the question: What's next? That's when you educate. Helen has put together a curriculum which teaches the testator or



settlor what to expect after their Statutory Will or Revocable Living Trust is drafted. Helen is committed to helping legal consumers gain access to the law through education and preparation. She is a long time CALDA member and is looking forward to discussing her new service. Stop by and see how she can help your business. Please visit:

<http://www.selfhelplawservices.com> for more information.

Dennis Fox with **Fore Trust Software** will discuss his Living Trust Software. This software provides the Legal Document Assistant with an automated process for the drafting and assembly of state specific estate planning documents. The question and answer intake format in this software aids in the preparation of quality documents custom created for each client by any professional in a matter of minutes. If you're considering adding estate planning services to your new or existing business you won't want to miss Dennis. Please visit his website at: <http://www.foretrustsoftware.com/Index.aspx>.

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## CHAPTER NEWS



### Bay Area Chapter

The next Bay Area Chapter meeting will be July 17, 2014. Dr. Robert Doerr, PhD, a family law and divorce mediator, will be speaking. It will be in the conference room at the Southland Square Building at 24301 Southland Drive in Hayward, topic TBD. The date is always the 3rd Thursday of each month, except at the December meeting.



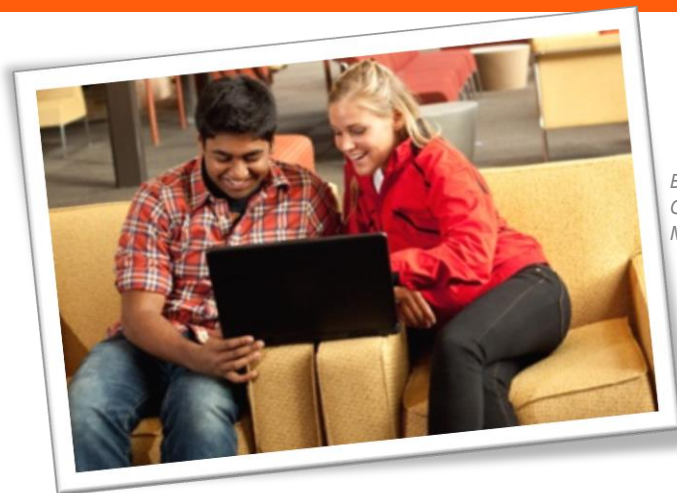
### Central Valley Chapter

The Central Valley Chapter will have their next meeting on August 20, 2014. Attorney, Joel Winter, will be speaking on Bankruptcy and post-filing credit repair. Please note our new meeting address: **The Downtown Club, 2120 Kern Street, Fresno, CA 93721**. The date is always the 3rd Thursday of each month, except the May meeting.



### Los Angeles/Orange Chapter

The next meeting of the Los Angeles/Orange Chapter is August 15, 2014. 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.



*Be sure to log in to the CALDA Community Forums for Member to Member contact.*

## Online with CALDA The Community Forums

The CALDA Community Forums is where LDAs share their knowledge with each other.

### 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.



**MEMBERS ONLY**

If you would like to receive notices as soon as they are posted to a discussion or group, you may go to that **Group** (i.e. All Active Members), to the right **Group Notifications**, and update to **Instantly**.

The best way to learn about the Community Forums is to jump on and start poking around. There is a wealth of information that your fellow members are ready to share with you.

## MEMBERSHIP

**Welcome New Members**

Aurora Franco Becerra

Ron J. Castaneda

Tony Coles

David Bass

Bill Ferguson

Melissa Foraker

Ruby Garcia

Cassandra Geoghegan

Yvette Green

Charles Hull

Denise Klingenberg

Kelly Landa

Alka Madan

Julia Mitchell

Elizabeth Olvera

Elena Paritskaya

Hope Peck

Sandra Sandoval

Deedra Lynn Van Strien Alvarado, J.D.

Leslee R. Vincent

Annamarie Williams

Tavoria L Wilson, J.D.

Denise Yetter

# CALDA's Curriculum

Series 100, 300 and 400



## 301 Probate Section: Form Preparation for the Petition for Letters Of Administration / Testamentary

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: the Petition for Letters. Learn when a probate is needed versus when it is not; the differences between the different types of probate proceedings; filling out the forms for being appointed as the Administrator or Executor of the estate.

## 401 Guardianship Section: Form Preparation on Guardianship of a Minor Child

A legal guardianship is when the court gives custody of a child under the age of 18, or the child's property, or both, to an adult caregiver. Learn the proper form preparation and procedure for filing for guardianship of a minor child's person and/or estate.

## 107 Family Law Section: How to Prepare Applications for Publication and Applications for Posting

Serving family law documents by either publication or posting is an alternate method of service permitted by the court when the whereabouts of the other party has been unknown for quite some time. Posting is only available to those meeting the low-income guideline used for fee waivers. Service by either of these methods involves several additional steps, which will delay your case.

## 113 Family Law Section: Steps on How Your Client Can Seek Grandparent Rights and Visitation by Filing a Request for Order or Joinder to a Case

Under California law, a grandparent can ask the court for reasonable visitation with a grandchild but in order to do this that grandparent has to establish there was a pre-existing relationship between the grandparent and grandchild. This class will teach how to prepare the documents and procedures required for such a petition.



# Message from the President

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Morning training: Class on how to prepare Limited Conservatorship forms taught by a Legal Document Assistant.

After lunch: Panel discussion by disability advocacy groups, LDAs, and others about the legal issues faced by families with severely challenged children.

(2) June Event on Elder Issues:

Purpose: To introduce groups like California Elder Justice Coalition, Legal Aid Association, and other influential groups to Legal Document Assistants.

Morning training: Class on how to prepare Elder Abuse Restraining Orders taught by a Legal Document Assistant.

After lunch: Panel discussion on legal issues faced by seniors. We already know Judge Cram from Contra Costa (who designed their Elder Abuse Court), and I am certain we can successfully invite Assembly member Yamada from Yolo County, whose bailiwick is senior issues.

(3) August Event on Domestic Violence:

Purpose: To introduce groups like California Partnership to End Domestic Violence and others to Legal Document Assistants.

Morning Training: Class on how to prepare Domestic Violence Restraining Orders.

After Lunch: Panel Discussion.

Admittedly, this is a high-risk strategy that puts us on the main stage. But not joining that stage is doubly dangerous. We not only need to join this greater community in order to thrive - I would suggest to you that we need to do this in order to survive. The Association must grow as new providers enter into our field. We need to join this greater community in order to thrive, and to serve the communities that need us.

The Curriculum is a crucial part of this strategy. The classes we teach must be excellent and beyond reproach, because we only have one chance to perform. If we don't shine, we'll fall flat on our faces. The

Curriculum and a well-trained faculty is critical in accomplishing our goal.

Thanks all, for your support of our Association, and thank you for the work you do every day,

Ian Duncan

CALDA President

## Fall Conference

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Clifford Wiens with **Pennbrook Insurance Services** will discuss the various types of insurance he has to offer. Since 1982, Pennbrook has assisted clients to understand their risks and provide them with the right insurance products including liability, errors & omissions, bonds, workers compensation, and more. Clifford is familiar with the special needs of the Legal Document Assistant. Whether you are new to the business or are a long time CALDA member, be sure and visit Clifford to see what he can offer you. Please visit his website at:

<http://www.pennbrookinsurance.com/company/history/index.php>.



### CALDA PUBLICATIONS NEWS

CALDA's Questionnaires are being translated into Spanish. We have contracted with a translator and are working toward having all of our brochures and questionnaires available to you in both English and Spanish. We will let you know when they have been completed.

Liz Fleischer

Publications Chairperson

*"No man is above the law and no man is below it; nor do we ask any man's permission when we ask him to obey it. Obedience to the law is demanded as a right; not asked as a favor."*

- Theodore Roosevelt