



CALDA update

SETTING THE STANDARD...EDUCATION, ETHICS, EXCELLENCE

Message from the President

Dear Members:

The Conference is approaching, and the Board and I are very excited for you to see CALDA's new standardized Curriculum, which will be presented at the

Conference. We test-drove the Curriculum at the Los Angeles Seminar to rave reviews, and now, for the first time, the education presented at our Annual Conference will be drawn from that standard Curriculum.



When I refer to the "Curriculum", here is what I mean: The Curriculum is comprised of a standard set of classes and the written materials presented in those classes. Those materials consist of PowerPoint presentations, each of which also has a large and comprehensive set of sample forms. We are designing the Curriculum in-house in order to regulate and ensure the quality of the classes we provide at the Conference, and at our other events throughout the year.

Let's be honest with each other: How many times have you attended a Conference in the past and found that, although many of the classes were excellent, some were, well, maybe so-so at best. Ask yourself, did you ever leave a class thinking something like this: "Well, I now know what a QDRO is a bit better, and I know what the ERISA is. But I'm

not sure I am any closer to knowing how to prepare one. In fact, wait a minute, the attorney who just taught the class told me I shouldn't be doing them in the first place".

I have had many discussions with members who have made those statements and who asked me those same questions. Confronted with this, we had no choice but to act to correct these deficiencies in what I consider our most basic task: **Providing quality education to our members.**

Why was class quality so inconsistent in the past? How is it possible that we could be capable of so many excellent classes, while we also featured other classes that were less successful?

The answer to that question is simple. In the past, CALDA depended on the individual instructors to bring the classes to a CALDA event. This approach resulted in inconsistent quality. Many instructors did an excellent job assembling and delivering their classes. But other instructors slapped their classes together at the last minute and were poorly prepared. Compounding this problem was that many instructors were not proficient with technology, and the visual quality of their materials was very poor. Some provided sample forms, while others did not. Even when the sample forms were provided, some instructors did not draw enough attention to them.

The solution to this problem I've described is also straightforward. Designing the materials ourselves is the best way to ensure their quality. This approach gives us the ability to focus our Trainings in the direction we desire, which is preparing forms and other legal documents for our self-represented clients.

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**Discounted Annual Conference
Price Ends September 30th**



Register Today!

October 3-4, 2014

Burlingame, California

Space is Limited!

Register today at www.calda.org

Complete Details

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**Member
Resources**

LDA Business Contracts

Business contracts, in both English and Spanish, can be found on the CALDA website in the Members Resources section.

2014 Annual Conference

CALDA's 2014 Annual Conference is nearly here. Each Training Session will include 15 minutes of Ethics. Click on titles to read more about each Session.

Schedule of Events

Friday, October 3, 2014

7:30 AM to 8:45 AM

Continental Breakfast & Registration

8:45 AM

Welcome by CALDA President, Ian Duncan, LDA

9:15 AM – 10:30 AM

[TRAINING #1 - Family Law: Section 101 – Form Completion for Beginning a Divorce, Legal Separation, or Annulment Proceeding](#) (1.25 hours CLE)

Or

[TRAINING #2 - Probate Law: Section 301 – Form Preparation for the Petition for Letters of Administration/Testamentary](#) (1.25 hours CLE)

10:30 AM to 10:45 AM BREAK

10:45 AM – 12:00 PM

TRAINING #3 - *How to Run Your Own LDA Business*

Step by step from a home office, virtual office or rental office: Advertising your business, keeping your finances in order, how much to charge for your services and so much more.

12:00 PM to 1:00 PM – LUNCH

1:00 PM to 2:30 PM

[TRAINING #4 - Family Law: Section 102 – Preparing the Forms for Declaration of Disclosure](#) (1.5 hours CLE)

Or

[TRAINING #5 - Probate Law: Section 302 – Form Preparation and Estate Procedures for After the Letters Are Issued: Creditors Claims, Change of Ownership, and Inventory and Appraisal](#) (1.5 hours CLE)

2:30 to 2:45 PM BREAK

2:45 PM– 4:15 PM

[TRAINING #6 - Family Law: Section 104 – Preparing Uncontested Judgment by Agreement](#) (1.5 hours CLE)

Or

[TRAINING #7 - Probate Law: Section 303 – Wrapping It All Up: Confirming Sales of Real Property and Petitions for Final Distribution](#) (1.5 hours CLE)

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

8:30 AM – 10:00 AM

[TRAINING #8 - Family Law: Section 105 – Overview on Family Law Motions: Form Completion and Procedure for Preparing a Request of Order](#) (1.5 hours CLE)

Or

TRAINING #9 - [Evictions](#) (1.5 hours CLE)

10:00 AM to 10:15 AM BREAK

10:15 AM to 12:00 PM

TRAINING #10 - President's Panel Discussion on LDA's Role in Providing Legal Access

12:00 PM – 1:00 PM LUNCH

1:00 PM – 2:30 PM

[TRAINING #11 - Family Law: Section 108 – Terminating the Marital Status: Bifurcation and Stipulated Status-Only Judgments](#) (1.5 hours CLE)

Or



[TRAINING #12 – Guardianships & Adoptions 401 – Guardianships of a Minor Child](#) (1.5 hours CLE)

2:30 PM to 2:45 PM BREAK

2:45 PM – 4:15 PM

[TRAINING #13 - Family Law: Section 110 – Restraining Order Preparation and Ex Parte with Temporary Orders Pending Hearing](#) (1.5 hours CLE)

Or

[TRAINING #14 - Guardianships & Adoptions 402 – Form Preparation for Terminating Parental Rights](#) (1.5 hours CLE)

QUICK FACTS

Friday, October 3rd – Saturday, October 4th, 2014

DoubleTree Hotel

835 Airport Blvd.

Burlingame, CA 94010

650-344-5500

Early bird member fee: \$350.00

Early bird non-member fee: \$400.00

After September 30, 2014 – Prices will be \$395.00/\$445.00

CHAPTER NEWS



Bay Area Chapter

The next Bay Area Chapter meeting will be October 16, 2014. 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 October 23, 2014. We will share key information from the 2014 CALDA Conference. Please note our next 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 October 17, 2014. This is a "bring your own lunch" monthly meeting with Judge Juhas. Please email Lois Isenberg at lois@divorcesos.com with your RSVPs (registration is a must - 25 attendee limit). Meetings are held every 3rd Friday of the month.

CALDA's Core Curriculum

Series 100, 300 and 400



How to Run Your Own LDA Business

Cindy Elwell will take you step by step from your home office, a virtual office or a rental office and show you how to advertise your business, keep your finances in order, how much to charge for your services and so much more!

101 Family Law Section: Form Completion for Beginning a Divorce, Legal Separation, or Annulment Proceeding

Instructor Cindy Elwell will teach the basics of form preparation to begin a divorce, legal separation or annulment proceedings (or responding to those different proceedings). She will describe how to prepare the forms needed for each type of proceeding, together with answers to some frequently asked questions.

102 Family Law Section: Preparing the Forms for Declaration of Disclosure

Marcel Neumann will show how to prepare a Declaration of Disclosure properly. In dissolution proceedings, parties are required to complete and serve their spouse within sixty days of filing a petition for dissolution, legal separation or annulment (Preliminary Declaration of Disclosure (PDDs)). This is to assure that each party complies with their statutory fiduciary duties to disclose assets and debts. This training covers the necessary forms for completing these disclosures.

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

Instructor Ian Duncan offers training that 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 when being appointed as the Administrator or Executor of the estate. Learn how to read and respond to the Examiner's Notes.

302 Probate Law Section: Form Preparation and Estate Procedures for After the Letters Are Issued: Creditors Claims, Change of Ownership, and Inventory and Appraisal

You've been appointed as the estate's personal representative; now what? Learn from instructor Helen Bellamy the forms and procedures needed after the Letters are issued, including Creditor Claims, 9202 Notices, Inventory and Appraisal, changing real property ownership and exclusions from reassessment.

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Core Curriculum

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104 Family Law Section: Preparing an Uncontested Judgment by Agreement

Instructor Carl Knoll will show how parties can enter into an uncontested judgment by agreement whether or not the respondent has defaulted or filed a response. Learn how to complete the required forms to prepare and file an uncontested judgment with an agreement.

303 Probate Law Section: Wrapping it All Up: Confirming Sales of Real Property and Petitions for Final Distribution

Helen Bellamy will teach the proper document preparation and procedure for successfully ending a probate proceeding; providing a detailed accounting; filing and serving the petition; responding to Examiner's Notes; and what to do after the petition is granted. This course also covers the procedure for obtaining court confirmation on the sale of real estate, which is required in some counties for pro-per litigants.

105 Family Law Section: Overview on Family Law Motions: Form Completion and Procedure for Preparing a Request for Order

Connie Crockett will help you learn and understand how to prepare a Request for Order form to ask the court to make orders in your family law case. This training is a general overview on how to complete the forms needed when asking for support, custody or property-related matters. This training will also cover the procedures for filing those forms, and for properly delivering them to the other party.

Evictions: Landlord/Tenant Matters

Jo Biel teach you how to properly understand, prepare, file and serve the necessary forms for completing an unlawful detainer (eviction lawsuit) from start to finish, with a good working knowledge of the principals of unlawful detainer proceedings.

108 Family Law Section: Terminating Marital Status: Bifurcation and Stipulated Status-Only Judgments

Instructor Marcel Neumann offers training the bifurcation process. Often parties are unable to resolve all the issues in their case, but want to become divorced. The bifurcation process allows them to do this while they continue to work out the remaining issues. This training will cover all the forms required to accomplish, file and complete this process

Guardianships & Adoptions 401: Guardianships 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 from Instructor Carl Knoll.

110 Family Law Section: Restraining Order Preparation and Ex Parte with Temporary Orders Pending Hearing

Instructor Robin Schumacher teaches how 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 training may reference civil orders but will focus on restraining orders requested through family court.

Guardianships & Adoptions 402: Form Preparation for Terminating Parental Rights

Instructor Debbie Driver explains how the termination of parental rights in an adoption is a court order that permanently ends a legal parent-child relationship. This training will cover the various grounds for terminating a parent's rights to parent a child, and form preparation and procedure.

The Conference Committee thanks:



Meet the Teachers

Carl Knoll

Carl A. Knoll has been a CALDA member in good standing since December 2002 and has served on the CALDA board as President (briefly), Vice President and as Professional Standard's Chair. Carl has been in the legal field since 1988 and began working on his own, first as an Independent Paralegal and now as a registered Legal Document Assistant since December 2001.

Carl lives in the beautiful Central Coast of California's wine country in the city of Paso Robles. Currently Carl's LDA business serves the San Luis Obispo and Santa Barbara counties and is expanding into other counties. Marketing his business is a passion of Carl's and providing the best possible service to his customers is a promise.

Helen Bellamy

Helen M. Bellamy is a business woman, professional Legal Document Assistant and ardent teacher. As a steward of Judicial Self-Help Center she has been providing legal assistance directly to the public since 1991.

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Meet the Teachers

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Helen is a member of the California Association of Legal Documents Assistants (CALDA) and is registered in Alameda County number 094.

Helen was a founding member of CAIP (California Association of Independent Paralegals) which is now known as CALDA. She also served as president and member of the Board of Directors and delegate to the National Federation of Paralegal Associations (NFPA).

Because of her love of learning and teaching, Helen has presented seminars on Probate, Stepparent and Adult Adoptions and Family Law at CALDA annual conferences, CALDA chapter meetings, law offices and financial planners workshops.

In 2007, Helen earned a law degree from John F. Kennedy University School of Law, Pleasant Hill, CA. She holds a Bachelors of Arts Degree in Political Science and a Paralegal Certificate from California State University at Hayward, CA.

Helen is an active member of her church, is married to Glenn R. Bellamy and is the mother of two adult children, Auzerais and Abayomi.

Marcel Neumann

Marcel A. Neumann is a Legal Document Assistant (LDA) and owner of Affordable Document Preparation Services of Hayward, California, a self-help Legal Document Assistant Company established in March of 1991 with the purpose of providing top-quality legal document preparation services, and giving the consumer an affordable alternative to gain access to the courts.

With more than 15 years experience, Marcel provides affordable and valuable self-help services to those of us who choose to approach our legal system without an attorney.

Marcel has been a member of the California Association of Legal Document Assistants (CALDA) since 1998, and he is currently a member of the Board of Directors.

He is professionally registered with the County of Alameda (LDA # 44 – Alameda

County) and he holds an LDA Bond with Merriwether & Williams Insurance Services.

Jo Biel

Jo L. Biel has worked under the direction and supervision of attorneys for the last 25 years specializing in landlord tenant law and property management. Last year Jo received her LDA license and UDA (unlawful detainer) license to begin her own business working with pro per landlords.

Jo has assisted in thousands of unlawful detainers, and based upon her expertise is looking forward to being and working with CALDA members.

In addition to raising five children, Jo is also a notary public and on the board of directors of a non-profit foster care agency.

Debbie Driver

Debbie Driver grew up in Yreka, California and started work as a legal secretary in the legal field in 1973. After many years working for civil attorneys as a legal secretary and then a paralegal, she opened her own business, Quality Document Preparation Center in Redding on March 1, 1998. Debbie has been a member of CALDA since 2002 and was a member of CAIP from 2000 to 2002. She has served on the Board of Directors of CALDA in the past and taught document preparation classes for unlawful detainers, guardianships, conservatorships and probate at previous CALDA conferences.

Connie Crockett

Connie grew up in Nevada City, CA, and received her paralegal certificate from Chico State University in 1986. Her interest in law stemmed from working as a foreclosure secretary at a local title company (with an escrow secretary, who is now a local judge!). After working with family law attorneys for the next eight years, on January 30, 1994 Connie opened S.O.S. in downtown Nevada City (originally known as Savelly's Office Services), now in business for over 20 years! S.O.S. originally contained a small stationary store and free self-help law library full of Nolo books, a prelude to the creation of the Nevada County Public Law Center.

Between March, 1992 and March, 2002 Connie served as the Nevada County Small Claims Advisor. She currently assists Sierra

County Superior Court with guardianship matters. She has been on the board of the California Association of Legal Document Assistants (CALDA) since 2002 serving as fundraising, legislative and conference chair, and as vice-president until October, 2013. Prior to this she was a member of CAIP, and LSI.

Connie focuses primarily on (happy) divorce, custody and support modifications, setting family law matters for hearing, trial and discovery, emergency matters, and some probate matters.

Connie is grandmother to 10ish grandchildren, and lives in a beautiful mountain town where she spends her days watching her grandkids grow, and hanging out with her awesome family and friends!

Robin Schumacher

Robin Schumacher is a Legal Document Assistant in Fresno, CA. She received her Certificate of Paralegal Training at San Joaquin College of Law and has been in business since 1994. After eight years of operating her business from her home office, she moved into an office in downtown Fresno where she continues to assist clients with document preparation for Family Law, Probate, Bankruptcy, Property Deeds and Unlawful Detainer matters.

Robin is president of the CALDA Central Valley Chapter and previously served on the Board of Directors for CALDA for over 10 years. She currently resides in rural Fresno County with her husband Craig where they enjoy tending their fruit trees and family get-togethers with their five grown children and four grandchildren.

In this 20th year of business, the family celebrated their son Aaron's graduation from San Joaquin College of Law, earning his Juris Doctorate.

Ian Duncan

Ian grew up in Alamo, in central Contra Costa County (which is in the San Francisco East Bay Area) and attended Monte Vista High School and San Francisco State University. He has been CALDA president since 2012 and views expanding the role of LDAs as critical to filling the justice gap.

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Meet the Teachers

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Ian became an LDA in 2006. Last year, Ian's spouse Corey Priest came to work in Ian's office with him. Ian primarily focuses on family law and probate matters, while Corey specializes in estate planning and deeds. They love the Grand Lake neighborhood in Oakland where their office is located, where they feel like they make a hugely positive impact on their local community

Cindy Elwell

Cindy Elwell is the founder of the Divorce With Dignity Network, who helps legal professionals become successful in having their own company and provide their clients with a safe place to obtain an amicable divorce that is easy, safe and affordable. She also provides these services in the Divorce with Dignity-Marín office.

In 1995, she opened the first Divorce with Dignity office in Alameda, California, and operated that until April 2013, when she sold it. She has been in the business for almost 20 years and helped thousands of people obtain an amicable divorce. She now focuses on expanding the Divorce With Dignity Network and as well as running Divorce with Dignity-Marín.

Unlike many of you, this was a change in career for her, and to make the transition, she took some paralegal classes at San Francisco State University and received much of her training and information from the California Association of Legal Document Assistants (CALDA). In addition, she has an Accounting Degree and many years of experience working for small businesses and nonprofits in various positions ranging from Controller to Business Manager.

In June of 2008, she began the global expansion of her company, which now has a network of legal professionals, all promoting peaceful, holistic divorces. They currently have offices throughout California and Florida, and are always looking to add new providers. All their providers are committed and trained in how to provide amicable divorces and resolutions for other legal matters, and in how to run their own business and provide quality service to their clients.

Message from the President

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Also for the first time to my knowledge, all of the instructors at the Conference will be experienced and learned Legal Document Assistants who are experts in form preparation. We are showcasing our best and brightest LDAs, and they will be the ones who are providing the education.

Attorneys are our invaluable partners and, in many cases, our friends. Obviously we must continue creating relationships and alliances with attorneys, because we have complimentary professions, and we need each other. We often need to refer our clients to them for advice, and they need to refer their clients to us for operational tasks that they cannot perform in a cost-efficient manner. Those needs are important, and we should nurture them. But we should not continue looking to attorneys as the basic providers of our education. We need to shed that old paralegal mentality of looking at attorneys as god-like creatures, which is terrible for our profession's growth and overall mental health.

It's time for us to stand up on our own and take responsibility for our own education ourselves. We prepare forms and legal documents every day, so why would we not look to *ourselves* for providing education to our members? It's what we do every day, and we are the experts in doing it. What profession would not look to its own greatest practitioners as the obvious purveyors of education on how to perform its work?

These exercises will make CALDA better. We need to improve, grow, and we need to be prepared to present ourselves to other members of the statewide Legal Access movement. Currently CALDA is invisible on a statewide level. We provide access to justice to our clients every day, but no one knows it. This is a dangerous situation.

When was CALDA last **invited** – yes, **invited** – to present at an important event regarding legal access? Did the State Bar ask CALDA to participate in its Task Force concerning legal access that is happening right now? No. Such an occurrence would have been normal in the distant past, but has not happened in years, possibly decades. We've presented ourselves on our own initiatives many times, but with limited effect.

Considering CAIP's former relevance and CALDA's current irrelevance, do you think that the policies of the past – of looking up to attorneys for everything, not taking our education as seriously as we should have done, and for looking solely within – have served us and our profession? These policies must change so that CALDA can rejoin the rest of the Access movement.

Our start will be this Conference. We welcome your feedback on the classes we'll be showing at this upcoming Conference.

MEMBERSHIP

Welcome New Members

Lisa Baumgardner

Aurora Franco Becerra

Kim Baldridge

Smile Dhir

Doreen Domer

Diane Ebbitt

Lynda Garman

Michael Glatfelter, Sr.

Nya Green

Laura McGee

Robert Alfred Revel

Stacy Saldutti

Carla Sprugasci

Brook Thurston

W. Henry Younger, Jr.

