November 1, 2015

CALDA
Special Edition
SETTING THE STANDARD…EDUCATION, ETHICS, EXCELLENCE

2015 Annual CALDA Conference: ANOTHER BIG SUCCESS

The 2015 Annual CALDA Conference was held last October 16-17, 2015 at the Holiday Inn-Los Angeles Airport. It was a well-attended event, with close to a hundred participants coming from all over California, including registered legal document assistants (LDAs), aspiring LDAs, and LDA-friendly attorneys and judges.

CALDA President Ian Duncan, LDA welcomed all the participants with great news of the successful passing of AB 285 which brings about changes beneficial to our LDA profession.

Friday morning began with a back-to-back session on Civil Litigation by Elias Referral Network Attorney Chris Stefan, and a simultaneous class on "X Spouse Program/Child Support Services Guidelines in Preparation of a Request for Order" with Orange County Family Law Commissioner Richard Vogl. This was followed by CALDA Vice President Carl Knoll's session on "How to Run Your Own LDA Business" which dealt with a step by step practical guide to choosing your office (i.e. home office, virtual office, rental office) to advertising your business, keeping your finances in order and how much to charge for your services.

To complete the excitement on Friday morning, Susan Volpe, CALDA's curriculum manager, introduced a new project: "LACE: Legal Access Education," CALDA's proposal to create a new paralegal school.

The Keynote Address was given by Connie Lapin and Dr. Harvey Lapin, husband and wife co-Founders, of the Autism Society of Los Angeles. For over 45 years Connie has been an internationally known lecturer and consumer/legislative advocate for children and adults with Autism Spectrum Disorders. Her work has involved testifying before governmental bodies and lecturing at universities and conferences. Years ago, she was the first autism representative in California when the Regional Center System recognized autism as a developmental disability. Her husband Harvey, a dentist by profession, has been a significant leader and strong advocate for individuals with Autism Spectrum Disorders and Disabilities for over 45 years. He has promoted disability awareness in lectures and publications and has authored and published articles. He has served as president of The Autism Society of America, California's Developmental Disability Area Board, and Client Rights Advocacy for Disability Rights of California. They presented to and appealed to LDAs to consider being Independent Personal Agents that can help the disabled be empowered to exercise their rights to independent living.

CALDA vice president, Carl Knoll, teaching "How to Run Your Own LDA Business

The afternoon sessions were just as dynamic with concurrent presentations by Michelle Wehrli on Probate Administration, and Ian Duncan on Conservatorship.

The first day of the conference was capped by the Dinner and Annual General Meeting and Elections.

The Lois Isenberg CALDA Legal Access Award 2015 was presented to CALDA member **Helen Bellamy**. CALDA presents this award to a **CALDA Member** who has made a special contribution to the promotion of access to justice for all Californians. Helen's commitment to education is her shining

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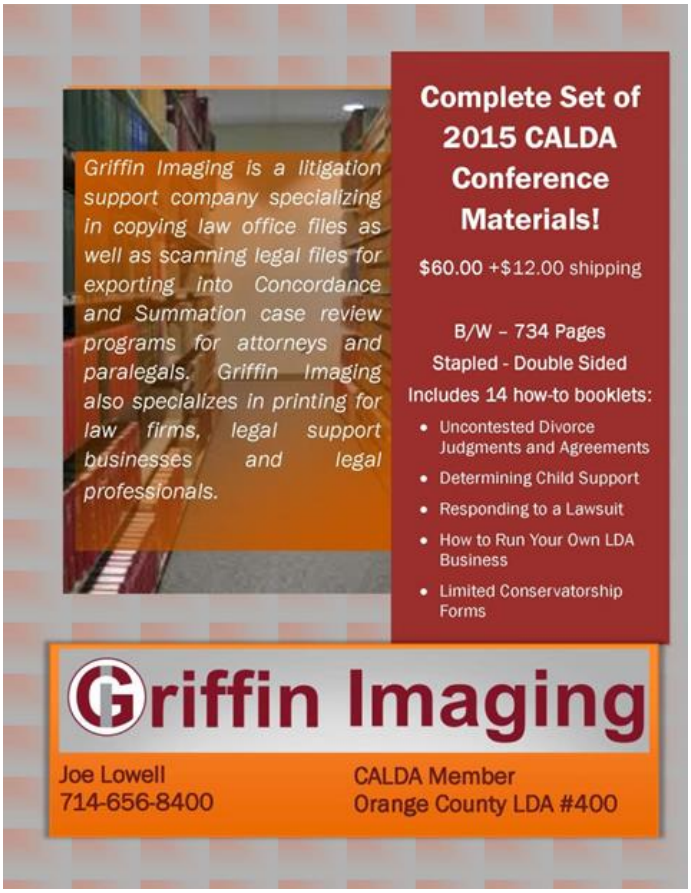
quality and what sets her apart as a true leader of our industry. Helen is a member of CALDA's faculty and is key to the development of our cherished Curriculum.

The Glynda Dixon Community Legal Access Award 2015 went posthumously to **Stephen Elias and Catherine Jermany-Elias** jointly for their myriad contributions to the people of our state, our industry, and to many of us personally. CALDA presents this award to honor a person who is not necessarily a CALDA member, but is or was key to the promotion of access to the legal system for all Californians. Steve passed in 2012, and Catherine just passed this year. Steve and Catherine touched so many of our lives and we will be forever grateful to them.

The elections were held, facilitated by Past President Marcel Neumann. Ian Duncan, was uncontestedly reelected for another two-year term as President and Carol Ludlow was reelected treasurer. Elected to the Board of Directors were Conference chair Elizabeth Fleischer, Publications chair Maureen McCready, Public Relations chair and Central Coast Chapter President Tyler Gross, Newsletter chair Peter Phuong Luong, and North Bay Chapter President Carlo Perez. The second day of the Conference was packed with another set of powerful speakers: Helen Bellamy, J.D. discussed Limited Conservatorships; Laura McGee, J.D. explained "Stipulated Judgments and Marital Settlement Agreements;" Judge Michael J. Convey of the Los Angeles County Superior Court lectured on "Petition to Establish a Parental Relationship" and Debra Burton, LDA taught the class on "Inter-spousal, Trust Transfer, and Other Special-Purpose Deeds."



CALDA president, Ian Duncan, presenting Helen Bellamy with CALDA's Legal Access Award

The afternoon was a good wrap-up with Galen Hammond, LDA on Estate Planning;

Laura Biewer, Certified Instructor for the National Notary Association, on Notary Updates; another session with Carl Knoll on practical LDA business tips; and finally, Ian Duncan's updates about the LDA changes effective January 1, 2016.

CALDA Members and supporters went forth empowered with fresh knowledge and renewed passion to provide legal access to the public. As Ian Duncan remarked during the General Meeting, "More work needs to be done." With a promising set of old and new leaders, CALDA is off to a good start, and will work harder to promote the highest standards of the LDA profession, providing access to legal services to all.

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Galen Hammond is Appointed New Director and Membership Chair

Galen Hammond, Vice President of CALDA LA-Orange Chapter, has been appointed by CALDA President Ian Duncan as Director and Membership Committee Chair. This appointment was done to fill in the vacancy on the Board resulting from the voluntary resignation of Noemi Artigapinto, who was elected to the position last year.

Galen was a nominee for Director in the recent elections held last October 16, 2015 during the Conference. He will serve as Director for the remainder of Noemi's term, which runs for another year.

VOLUNTEERS WANTED!

We are organizing an **"LDA Access Program"** in public libraries in Vallejo, Benicia and American Canyon, to provide an opportunity for the public to meet and get to know LDAs as a non-attorney option to meet their legal services needs. Please contact Carlo Perez at 707-656-3212 or carlo@a1documenthelp.com for more information or to volunteer.

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CHAPTER NEWS - MEET UP WITH YOUR LOCAL CHAPTER THIS MONTH

Bay Area Chapter

The next Bay Area Chapter meeting will be November 19, 2015 at noon. We will be discussing the October Conference and sharing resources. We will meet in the 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.

Central Coast Chapter

CALDA's Central Coast Chapter will meet on November 18, 2015, from 1-2pm at Family Legal Document Services . The topic will be Estate Planning with speaker Tonya Krueger. Family Legal Documents is located at 129 North I Street, Suite A, Lompoc, CA 93436. The Chapter meets the third Wednesday of the month. If you plan to attend, please RSVP by emailing Tyler Gross at tylergrosslda@gmail.com.

Central Valley Chapter

The Central Valley Chapter meets on the third Thursday of the month (October revised due to conference). We will be meeting at the Yosemite Falls Café, 5123 N. Blackstone Avenue, Fresno, CA 93710

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

12-17-2015 – Holiday Get-Together

North Bay Chapter

NEW VENUE EFFECTIVE THIS MONTH!

Meetings are now held at 718 Main Street, Suite 201, Suisun City, CA 94585. Topics for upcoming meetings:

November 10, 2015 "Technology and Software for LDAs"

December 8, 2015

Christmas Holiday Gathering

The meeting day is always the 2nd Tuesday of each month from 12:00 to 1:30pm. 1 hour CE credit will be earned for attending the chapter meeting. Dues are $5 for CALDA Members and $10 for non-members attending the meeting.

Los Angeles/Orange Chapter

The next Judge Juhas meeting will be held on November 20, 2015. The meetings are every 3rd Friday (unless noted otherwise), 111 North Hill Street, DEPARTMENT 64, Los Angeles, 90012. The Los Angeles/Orange Chapter meetings are held immediately after the Judge Juhas meetings on the 9th Floor Cafeteria of the courthouse. Please email Lois Isenberg at lois@divorcesos.com with your RSVPs (registration is a must - 25 attendee limit).

HELP YOUR LOCAL CALDA CHAPTER!

Find your Local CALDA Chapter and get involved!

Do you think the closest Chapter is too far away?

Get together with your local CALDA members and talk about starting your local chapter in your area...

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