

# CALDA update

SETTING THE STANDARD...EDUCATION, ETHICS, EXCELLENCE

## The LA/Orange County Summer Seminar

### Education for LDAs

CALDA Presents Its 2016 Summer Seminar Series hosted by the CALDA-LA/Orange Chapter. Fee includes continental breakfast, buffet lunch and handouts.

### Schedule of Events

Registration 7:30-8:30 a.m.

#### Morning Schedule

#### 8:45 AM to 10:15 AM

**Completing an Uncontested Divorce from A to Z** (1.5 hours CLE) Instructor: Galen Hammond, LDA

Learn about the different ways to begin and end your marriage or domestic partnership, the requirements for each, and basic information about the court process.

#### 10:30 AM to 12:00 PM

**Understanding Examiner (Probate) Notes and Resolving Them In Probate Petitions** (1.5 hours CLE) Instructor Ian Duncan, LDA

This intermediate level class will help improve the skills of those who are already somewhat familiar with probate proceedings. Learn to

problem solve by seeing and fixing the most common errors in probate petitions, and learn how to read and respond to the Examiner's Notes.

#### 12:00 PM to 1:00 PM Lunch

#### 1:15 PM to 2:45 PM

**Child Support Calculation, Imputing Income and Time Share** (1.5 hours CLE) Instructor Judge Mark A. Juhas

Learn and understand how child support is calculated by imputing income which is a method courts use to assign or credit an income to a parent for the purpose of child support. If the court finds that either parent is, without just cause, voluntarily underemployed or unemployed, then the court will impute income to that parent.

#### 3:15 PM to 4:45 PM

**Preparing a Probate Accounting** (1.0 hour CLE) Instructor Michelle Wehrli

This class will cover how all accounts filed with the court must include a financial statement and report of administration according to specific guidelines found at Probate Code sections 1060-1064 and 10900. The account must state the period covered and contain a summary, supported by detailed schedules, showing the following:

- Property on hand at the beginning of the accounting period (i.e., the inventory value of all assets),
- the value of assets received during the accounting period, excluding property listed in an inventory,

- income receipts, excluding receipts from a trade or business,
- net income from a trade or business,
- gains on sales,
- disbursements, excluding disbursements for a trade or business and excluding distribution to beneficiaries,
- losses on sales,
- net losses from a trade or business,
- distributions to beneficiaries, and
- property on hand at the end of the accounting period, listing each asset at its appraised value as shown on the inventory and appraisal (carry value), and its current market value.

### QUICK FACTS

Saturday, July 16, 2016

Courtyard by Marriott

6333 Bristol Parkway

Culver City, CA 90230

(310) 484-7000

Member/Non-Member  
\$135.00/\$265.00

Parking \$8.00

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

# CALDA - Growing A Profession

by Maureen McCready

Those of us who enter the Legal Document Assistant profession as paralegals face unique challenges as we transition into the role of LDA. Gaining the experience knowledge and confidence to make services available to our communities in this capacity requires a thorough understanding of the statutes that govern the profession and continuing education to guide us and our clients through the channels that result in successful procedural services provided within the law.

In my experience as a paralegal, and as a business executive, the skills that I was called upon to develop dealt primarily with

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contracts, intellectual property and corporate law which included drafting documents, legal research and interpretation of both for my employers. Offering legal services directly to the public as an LDA meant altering the work I could deliver and the way in which I interact with the client. My biggest questions upon entering the field were, a) How will my clients know how to direct me in these matters? and b) Why are they in my office if they know how to do this?

Without CALDA to help answer questions like these I doubt that I would have persevered in this field. But CALDA and the CALDA network have been priceless in helping me to understand how to provide high quality services to my clients with confidence. What I have learned through the seminars, conferences, and most importantly, the generosity of co-members willing to share information, forms and procedural insights has made all of the difference in the world. I encourage any new LDA struggling with the growing pains of breaking into this unique profession to persevere. Take every class CALDA offers, connect with other members regularly via conferences and seminars ~ join the board! It is with great gratitude that I renew my

membership with CALDA annually. I love this professional community ... Many thanks to all of you have worked long and hard to create a home for us as professionals to support one another.

## Marketing Your LDA Business

### Plan Your Work and Work Your Plan

by Carl Knoll, CALDA Vice President

Not everyone desires to build a multi-million or multi-billion dollar a year business. Most entrepreneurs simply desire to open a small business and fulfil that burning desire to provide a service or product to customers that they will love and tell everyone they know about it and, "Voilà," success! Well, if it was that easy, everyone would do it and nobody would work for anyone else. The world would be a much better place...peace, love and happiness abound! So, let's interject a dose of reality. I hate to say it, but most small businesses fail within the 1st two years because of a lack of a business plan and it is not property capitalized from the start. So, if you are not planning to succeed, then you may as well not start or find another passion. Now, here is the good news, if you do in fact "plan" to succeed, you have a much, much better chance of doing exactly that...attaining success! Let's take a look at how to do it.

Having a business plan or some sort of strategic plan or at minimum detailed notes on a post-it is the very 1st step. Without some sort of "written" plan, the plan does not exist. You have heard that the 1st step in attaining goals is to write them down is absolutely true. However, a goal would be to wake up earlier on a daily basis or take the trash out. Opening and running a business takes more than simply writing down a list of goals. Sure you can call your business plan a "goals list," but those goals better come with well thought out details on how to attain the goals. Plus, the plan or goals should have a timeframe associated with them for accountability. This short article is not intended to help you write your business plan, but to perhaps motivate you to do it or update yours if you do in fact have one. Most people who have a business plan rarely review it or update it regularly, which can also have its own set of issues. Therefore, I encourage you to schedule an hour or two at

the conclusion of reading this article to visit the Small Business Administration's website at SBA.gov to learn how to write a business plan and plan for a successful run at developing a business that has a good chance at success so you can continue your dream of running your own "successful" business.


## CALIFORNIA COUNTY PUBLIC LAW LIBRARIES

Join Us

### in Celebrating 125 Years of Service by California County Law Libraries


**When:**

**Wednesday August 17th, 2016  
5:30pm-7:30pm**





**Where:**

**The Wedgewood Sterling Facilities at  
[1300 H Street, Sacramento, CA 95814](http://1300.HStreet,Sacramento,CA95814)**



Light appetizers and beverages will be served.  
There will be a brief program at 6:30pm.

**Sponsored by:**

RSVP at <https://125anniversary.eventbrite.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.
7. The Board reserves the right and absolute discretion to revoke a Chapter's charter if, in the Board's judgment, the Chapter fails to operate in a way that is not in line with CALDA's Mission Statement, does not follow the basic requirements of operating a chapter, or is otherwise detrimental to CALDA.

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



#### Bay Area Chapter

Our meeting on July 21st will feature Helen Bellamy, long time CALDA member and past President, will speak on Rules of the Court for Probate. The Bay Area Chapter of CALDA meets the third Thursday of the month from 12:00 to 1:30 pm in the basement conference room of the Southland Square Building at 24301 Southland Drive, Hayward. Mark your calendar today so you can join us. For further information you can contact Marcel @ 510-782-6811, Debra @ 209-836-5430 or Jeri @ 650-574-2087. .

#### Central Valley Chapter

No Meetings Scheduled for July, August and September. The Chapter meets the third Thursday of the month at the Yosemite Falls Café, 5123 N. Blackstone Avenue, Fresno, CA 93710. Meetings are from 11:30 am to 1:00 pm. For more information you can contact Robin Schumacher [robinschumacherlda@gmail.com](mailto:robinschumacherlda@gmail.com) or Judy Locatelli at [judy@judyslegaldocumentservice.com](mailto:judy@judyslegaldocumentservice.com).



#### North Bay Chapter

##### North Bay Chapter

Our next meeting will be on **WEDNESDAY, AUGUST 10, 2016**, 12:00pm to 1:30pm at Solano Community Foundation Conference Room, 2nd floor, 744 Empire Street, Fairfield, CA 94533.

Topic: **Best Practices for Providing Estate Planning Document Services: A Roundtable Discussion**  
Members who have been doing Living Trusts and Wills and other Estate Planning documents are sharing their best practices in a round table discussion. RSVP to Carlo Perez, [carlo@a1documenthelp.com](mailto:carlo@a1documenthelp.com), tel. 707-656-3212 or Judy Reyes, [judy@reyesdocuments.com](mailto:judy@reyesdocuments.com), tel. 800-921-2756.

#### 5 Cities and San Luis Obispo Chapter

NEW! The 5 Cities and SLO Chapter of CALDA will have its first meeting Thursday, July 21, 2016 from 12:00-1:30pm. The topic is Small Business Marketing - Without Breaking the Bank. Mark your calendar today so you can join us. For further information you can contact Tyler Gross-Stuart at (805) 245-3747 or [TylerGrossLDA@gmail.com](mailto:TylerGrossLDA@gmail.com).



#### Los Angeles/Orange Chapter

There will be NO JULY MEETING as we will be hosting the Summer Seminar on Saturday, July 16, 2016. Regular meetings are "bring your own lunch" monthly meetings with Judge Juhas. 111 North Hill Street, **9th Floor Cafeteria**, Los Angeles, CA 90012. Please email Lois Isenberg at [lois@divorcesos.com](mailto:lois@divorcesos.com) with your RSVPs (registration is a must - 25 attendee limit).

MEMBERSHIP

Welcome New Members

- Esther Aguirre
- Yolanda Alvarez
- Kathy Lynn Amyotte
- Tammy Billups
- Devon J. Bolla
- Yvonne Brown
- Margaret Buckley
- Richard James Carter
- Judy Castillo Marshall
- Antionette DiPerna
- Aida Duran
- Ryan Falk
- Diane Gunn
- Mary E. Hansen
- Olga Jefferson
- Angela Jones
- Joan Kessman
- Cindy Kim
- Patricia Klotz
- Diane Lopez
- Gina Lourenco
- Vannie Luong
- Arnoldo Meza
- Gabriel Morales
- Jennifer Morales
- Jacqueline Moya
- Martha Ornelas
- Ellie Partovi
- Stephanie Richter
- Randall Smith
- Jackie Soto
- Maria Vena

MEMBERSHIP

- Joanna Vivar
- David Weissman
- Chimere Williams
- Sonny S. Won
- Henry Yen



## The Advantages of Working with an LDA

By Regina Van Hecke  
CALDA Legislative Chair

When faced with any situation that requires legal paperwork, such as divorce, application for guardianship or custody, or estate planning documents such as wills and deeds, you have a few options available to you. You can read a legal self-help book that can guide you through which forms you will need and how to fill them out. You can also choose to hire an attorney who can give you legal advice and prepare everything you need. Your third option though, hiring a Legal Document Assistant (LDA) to complete and file the forms you need at your direction, can have significant advantages over the other two.

While a legal self-help book can indeed be helpful, and may be a good option in some cases, legal forms for many situations can be very complex and numerous. In addition, if they contain mistakes, if information is missing, or if they are not filed correctly, delays and extra work can result. For many

people who may already be going through a stressful time in life, the amount of work and attention required to complete and file legal documents correctly on their own can be overwhelming. It is not uncommon for people to start the process of doing their own paperwork only to become frustrated and seek out help part-way through. This can lead to delays in the process as well as extra costs. On the other hand, if you know what you want, as well as what your legal rights are in your situation, a Legal Document Assistant can assure that the documents you need are prepared and filed completely, correctly, and in a timely manner, relieving you of the stress and time commitment of doing it all on your own.

*For many people who may already be going through a stressful time in life, the amount of work and attention required to complete and file legal documents correctly on their own can be overwhelming.*

A Legal Document Assistant can help you for a small fraction of the price of an attorney. There are times, such as when you need legal advice or when you know that your case will be going to court, that hiring an attorney is not only wise but possibly necessary. In many cases though, hiring an attorney can be an unnecessary and very costly expense. For instance, the typical attorney fees for a divorce in California are \$300 - \$400 an hour while the total cost can range from \$15,000 - \$20,000 average per person. In contrast, many Legal Document Assistants will help you complete and file all the necessary documents for a divorce for a flat fee well under \$1,000, literally saving you thousands of dollars.

Working with a Legal Document Assistant can also help maintain a calm and cooperative experience by often helping their clients to avoid the prospect of litigation when going to court is not necessary. LDAs commonly work in close relationship with mediators to whom they can refer you if you need assistance coming to agreements with other involved parties. LDAs tend to be very knowledgeable about community resources that can be utilized to

help their clients when a particular situation calls for added help from other professionals.

If you have any questions about how to find an LDA or would like more information about the work that LDAs do in your community, visit the CALDA website at [www.calda.org](http://www.calda.org) for more information. With the help of a Legal Document Assistant, many people can successfully achieve their goals affordably and efficiently. Working with and developing a connection with an LDA can be a great asset for many people throughout their lifetimes.

## The LDA Trail

by Carol Ludlow

As I write this article I am sitting in the observation deck of an Amtrak train, travelling through the Cascade Mountains of Oregon. Our tour guide is telling us about the immigrants, who travelled along the Oregon Trail in 1853, and of the hardships they had to endure, many of whom did not survive.

And, as I look out on this incredibly beautiful scenery, I am very thankful that I live in 2016 and not 1853, that I drive a car and not a covered wagon, that I have my computer and cell phone and do not have to rely on a pony express.

One story that the tour guide related to us was about a man called Elijah Elliott, who in 1853, was tasked with leading a group of immigrants along a previously established trail called The Meek Cutoff. However, instead, of turning north at the Deschutes River, he mistakenly turned south and led the immigrants across the Cascades and onto a road known as the Free Emigrant Road. They

lacked provisions and were forced to eat some of the horses, many were without shoes and suffered bad cuts from the briars, many became crippled and had to be abandoned and approximately 24 died. To their detriment, they had relied on Elijah Elliott to lead them to their destination safely.

Although we are not entrusted with leading 1500 people through the wilderness, our task is no less important. Our clients trust and rely on us for help in what, for many of them, feels like a life threatening situation. They rely on us to lead them down the right path, to understand, and avoid, the dangers. But how do we prepare to help our clients?

Our new educational requirements will ensure that we are equipped with the knowledge and resources to accomplish that goal. We have access to technology that was not even thought of in 1853. Imagine how different the result might have been if Elijah had a cell phone or GPS. But, even if our technology were stripped away, we have something else that could have saved Elijah and his group of weary immigrants.

Access to the collective knowledge of LDAs, many of whom have travelled the very same road we find ourselves on with our client. Our most valuable resource is CALDA. After 15 years in this business, when I have questions about a service I am not familiar with, I still turn first to other CALDA members, all of whom provide that help without question. I never go to a seminar or conference or attend a teleconference class without learning something that I did not know prior to attending the class. It was at my first CALDA conference in 2002 that I was encouraged to move out of a home operated business to an office. I took this advice and I

have never looked back.

I am thankful not only that I live in 2016, but that I am a Legal Document Assistant in 2016. With the recent change in our law, I truly believe that our profession is on the verge of exploding into something even bigger and better than it is now.

Elijah's trail had been cleared but he chose not to listen to those who had gone before him. Let's take advantage of this path that has been cleared for us and enjoy this exciting time on the LDA Trail.



## SAVE THE DATE

### CALDA's Annual Conference

October 14-15, 2016

FOUR POINTS BY SHERATON

SACRAMENTO INTERNATIONAL AIRPORT

4900 Duckhorn Drive

Sacramento, California 95834

YOU ARE CORDIALLY INVITED TO  
**LA LAW LIBRARY'S  
 ROARING 125TH  
 ANNIVERSARY BASH**

**JULY 27, 2016**

**5:30 PM - 8:00 PM**

Win a cash prize in the 1920's-themed costume contest.  
 Enjoy continuous music. Take a themed tour...and visit the haunted 6th floor.  
 Get the inside scoop on some of LA's celebrity trials. This night is guaranteed to  
 be the bee's knees, the kipper's knickers, the cat's pajamas...you know, great!

FREE Parking. No Admission Charge.  
 To reserve your spot please RSVP by July 20<sup>TH</sup> to [www.lalawlibrary.org/125](http://www.lalawlibrary.org/125)

**301 W. 1ST STREET | LOS ANGELES, CA 90012**