

BAY AREA LEGAL SECRETARIES FORUM

presents

43rd Annual Seminar

WHAT IS THE BAY AREA LEGAL SECRETARIES FORUM?

The Bay Area Legal Secretaries Forum was organized in 1966 by legal secretaries from nine Bay Area counties to fill a need for continuing education for legal secretaries in the "Continuing Education of the Bar" tradition.

With a relatively small membership, the Forum holds three quarterly workshops in the Bay Area each year (July, October, and January) and large multi-workshop seminar(s) in the spring.

Until 1973, the Forum presented only two large seminars in the spring, with the assistance of the University of California Extension. In 1974, the Forum began presenting the smaller quarterly workshops on single subjects, without outside assistance. Beginning in 1978, the Forum assumed complete responsibility for its full educational program.

Although many Forum workshop speakers are attorneys, the volunteer Forum membership works year round and is responsible for every aspect of the program, including: the brochure text; selection of subject matter; planning, recruiting and coordinating the panels; and the writing and proofreading of copy for handout materials.

The Forum was granted MCLE provider status by the State Bar of California in 1994.

APRIL 12, 2008

**Concord Hilton Hotel
1970 Diamond Boulevard
Concord, California 94520**

This seminar is intended to provide an opportunity for registrants to improve their skills and enhance their understanding of the legal profession.

Included in this concentrated one-day seminar are seven (7) all-day workshops covering a wide range of subjects, some of which are being presented for the first time at this seminar.

Outstanding representatives of the legal profession lend their expertise to demonstrate the most current procedures; discuss recent code and rule changes; and illustrate how your knowledge can provide invaluable support in the effective and efficient conduct of a law practice.

Membership in a legal secretaries association, or other professional organization, is not a requirement for attendance at the seminar.

No change of a selected and assigned workshop will be made on the date of the seminar. Seating in workshop meeting rooms is for registrants only. Absolutely no recording of any type is allowed in the workshops. No smoking is permitted in the workshops or lunchrooms. Please turn off all pagers and cell phones during each session.

PROGRAM

8:30 – 9:00 a.m. Registration (Coffee/Danish)
9:00 – 12:00 p.m. Morning Session
10:15 – 11:00 a.m. Coffee Break
12:00 – 1:30 p.m. Luncheon (included)
1:30 – 4:00 p.m. Afternoon Session

WORKSHOPS:

ADMINISTRATION OF LIVING TRUSTS AFTER DEATH OF A SPOUSE

*Presented by: Livermore-Amador Valley LPA
Chaired by: Sharon M. Beall*

Join us in exploring the administration of living trusts after the death of the first spouse from sending the initial notice to beneficiaries to asset distribution. You will learn how to review trust documents, educate clients and gather necessary information, and deal with assets outside the trust. In addition, the speaker will show how to use spreadsheets for subtrust funding, establishing targets, and asset allocation. Through checklists and forms, this workshop will give you a practical system for administering living trusts after death.

SPEAKER:

DAVID B. GAW, ESQ.

Certified Specialist, Estate Planning, Probate & Trust Law - Certified Elder Attorney
Gaw Van Male
Napa, Fairfield, Vacaville, CA

APPELLATE PROCEDURES – STATE & FEDERAL

*Presented by: San Francisco LPA
Chaired by: Christine Flores*

The rules that apply in the state and federal appellate courts are very different from the rules that apply in the trial courts. Well-known attorney and author James M. Wagstaffe will explain the rules and procedures for appeals in the state and federal courts. Mr. Wagstaffe is a nationally known speaker on federal civil procedures, he is a featured lecturer on federal jurisdiction, preemption, and the Judicial Improvements Act of 1990 at the annual Federal Judicial Center programs for all the Circuits. He teaches several times per year at the Center's "New Judges Workshops," lecturing on all aspects of federal procedure.

SPEAKER:

JAMES WAGSTAFFE, ESQ.

Kerr & Wagstaffe LLP
San Francisco, CA

ATTORNEY ETHICS AND PARALEGAL PRACTICE AND CALENDARING

*Presented by: San Mateo County LSA
Chaired by: Diana Prisk*

This informative workshop will show you the ethical issues involved in the attorney-paralegal relationship and dealing with your clients. You will see what is involved with attorney supervision of paralegals and what NOT to say at parties or in the elevator. You will also learn how ethical duties can be breached by missed deadlines or errors in legal documents. We will show you ways to help you stay on top of these issues so that you can better serve your clients. Listen and learn from real life examples. (The names have been changed to protect the ????)

SPEAKERS:

DIETRA PRATER SLACK

Paralegal/Legal Secretary Instructor
Skyline College
Oakland, CA

BASIC CIVIL LITIGATION

*Presented by: Alameda County LSA
Chaired by: Donna Day
Tracey Newman*

Are you thinking of transitioning into the litigation department? Do you want to keep your litigation skills up to date and current? If so, then this is the workshop for you. This workshop will cover all of the aspects of civil litigation – state and federal procedures, including the initial filing of a summons and complaint, discovery, calendaring, and pre/post-trial procedures. This will be a basic overview and will include use of various resources including court websites and updated Judicial Council forms. We invite you to come learn more about civil litigation or just to brush up on your existing litigation skills.

SPEAKER:

VINCENT CASTILLO, ESQ.

Lombardi, Loper & Conant
Oakland, California

BEGINNING LEGAL SECRETARY

*Presented by: Napa County LSA
Chaired by: Lori A. Hunt*

This workshop will benefit the legal secretary and support staff with less than one year of experience in the law office. The speakers will introduce registrants to court structure and provide an overview of multiple areas of law including civil litigation, family law, corporate, estate planning and estate proceedings. The workshop will also address the preparation and filing of legal documents with the court, written and oral communications, and legal terminology. Law office management, ethics, career development, and tips on dealing with difficult office situations will also be covered.

SPEAKERS:

MARY J. BEAUDROW, CCLS

Morrison & Foerster LLP
San Francisco, CA

BEVERLY JOHNSON

Landmark Legal Professionals
San Francisco, CA

KAY E. KASIC, CLA

Coombs & Dunlap LLP
Napa, CA

DISCOVERY: TECHNIQUES, STRATEGIES, PLANS, PITFALLS AND E-DISCOVERY IN COMPLEX LITIGATION

*Presented by: Members-at-Large I & II
Chaired by: Beverly Kundracik & Jane Ann Rager*

Join us for an intense day of discovery activities in complex litigation cases. Our speakers will identify various techniques and strategies in planning avenues of discovery by utilizing deposition skills, interrogatories, requests for admissions, and requests for production of documents, including activities using e-discovery and paper discovery. The speakers will discuss the various pitfalls when propounding and responding to discovery.

SPEAKERS:

SOMNATH RAJ CHATTERJEE, ESQ

Morrison I Foerster LLP
San Francisco, California

OLIVER Q. DUNLAP, ESQ.

Morrison I Foerster LLP
San Francisco, California

FAMILY LAW

*Presented by: Mt. Diablo LPA
Chaired by: Nancy McMahan*

This workshop is designed for the legal secretary/legal assistant/paralegal with experience in family law. Subjects covered will include the initial client interview, assessment of the case and the need for temporary orders, preparation of an initial Order to Show Cause, preparation of the Income and Expense Declaration, child and spousal support calculations using Dissomaster, discussion of custody issues and procedures, discovery methods, preparation of preliminary and final disclosures, reimbursement claims, bifurcation of marital status, complex issues in property division, the use of experts, and mediation (collaborative practice). The speakers will also cover resources, tools, and aids for use in family law.

SPEAKERS:

SUSAN E. NICKELS, PARALEGAL

Lakin Spears LLP
Palo Alto, California

RITA A. PATTERSON, ESQ.

Lakin Spears LLP
Palo Alto, California

REGISTRATION FORM

Mail to: Adele Badoyen, 3451 Hostetter Road, San Jose, CA 95132.

For registration information, please telephone Adele Badoyen or Veronica Farias at (415) 561-9706 (leave message). For workshop information, please telephone Donna Day at (415) 984-8255.

Enclosed is \$ _____ as payment for _____ enrollment(s) for April 12, 2008.

- Registration received on or **before** March 30, 2008 \$175
 Registration received on or **after** March 30, 2008 \$200

IF ENROLLING MORE THAN ONE PERSON, PLEASE USE A SEPARATE SHEET FOR EACH REGISTRANT. The Forum offers a group discount of ten percent (10%) for six (6) or more registrations, submitted together with a **single payment**, and to members of LSI. Only one discount applies.

Name _____ State Bar No. _____
Attorneys ONLY

Firm Name _____

ADDRESS _____
Street and number

_____ City _____ County _____ State _____ Zip _____

Daytime telephone _____ E-mail _____

SPECIAL DIETARY LUNCH REQUIRED. Yes No
Restrictions: Please check: Vegetarian No Dairy Diabetic
Other _____

Physical Disability: Please specify: _____

Make checks payable to Bay Area Legal Secretaries Forum. **There is a \$10 charge for returned checks.**

BALSF Tax Identification No. 94-2338260.

Space in all workshops is limited and will be filled in the order that enrollments with payment are received. **Advance written cancellation is required.** If you enroll and cannot attend, a refund will be granted only if written request is received by noon on Wednesday, April 9, 2008. There is a \$10 service charge for all refunds.

A PARTICIPANT WHOSE ENROLLMENT IS RECEIVED MORE THAN 15 DAYS BEFORE THE SEMINAR WILL BE ADVISED OF WORKSHOP CONFIRMATION BY RETURN E-MAIL (IF ADDRESS IS PROVIDED).

WORKSHOPS (choose one) Please indicate if there is an acceptable second and third choice.

- A. ___ Administration of Living Trusts After Death Of A Spouse
B. ___ Appellate Procedures – State and Federal
C. ___ Attorney Ethics and Paralegal Practice and Calendaring
D. ___ Basic Civil Litigation
E. ___ Beginning Legal Secretary
F. ___ Discovery: Techniques, Strategies, Plans, Pitfalls and E-Discovery In Complex Litigation
G. ___ Family Law

ENROLLMENT

The enrollment fee for each seminar is **\$175**. This includes coffee, rolls, the complete seminar materials, luncheon, and attendance in the workshop for which you register. Early enrollment is advised; payment must accompany enrollment. Space is limited and registrations are accepted in the order received. Enrollments will be accepted at the door **only if space is available**; late registration is **\$200** per registrant.

The Forum reserves the right to cancel a workshop with insufficient enrollment.

Tuition fees and related educational expenses paid by taxpayers primarily for the purpose of maintaining or improving skills required in their employment or other trade or business are deductible for federal income tax purposes (Treas. Reg. 1.162-5). Further information may be obtained from the Internal Revenue Service.

CCLS or CLA re-certification hours are awarded at the conclusion of the seminar upon presentation of completed form(s) to designated individual(s). Certification forms are to be provided by the registrants.

CANCELLATION - REFUND

ADVANCE CANCELLATION IS REQUIRED. If you enroll and cannot attend, a refund will be granted if written request is received by noon on Wednesday, April 9, 2008. There is a \$10 service charge.

HOTEL ACCOMMODATIONS

Although the Forum cannot make hotel reservations for the registrants, the Concord Hilton Hotel has reserved a block of rooms that will be held through March 28, 2008, and has offered the rate of \$94 per night plus applicable taxes for Forum registrants; registrants requiring hotel accommodations should act promptly to take advantage of this special rate and the limited block. Please contact the hotel directly and indicate your attendance at the Bay Area Legal Secretaries Forum seminar to obtain the special rate. This rate applies to both Friday and Saturday nights. The Concord Hilton Hotel is located at 1970 Diamond Boulevard between Willow Pass Road and Concord Avenue off 680 in Concord.

FOR MORE INFORMATION

PLEASE CONTACT ONE OF

OUR MEMBER ASSOCIATIONS:

Alameda County LSA Donna Day
(415) 984-8255

Livermore-Amador Valley LPA
Sharon M. Beall
(925) 447-1222

Mt. Diablo LPA
Nancy McMahan
(925) 518-0562

Napa County LSA
Lori A. Hunt
(707) 252-9000

Palo Alto LSA
Helen D' Alessandro
(650) 839-5064

San Francisco LPA
Christine Flores
(415) 773-5566

San Mateo LSA
Diana L. Prisk
(650) 296-9840

MAL Group I
Beverly Kundracik
(408) 255-2374

MAL Group II
Jane Ann Rager
(925) 672-2914

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www.balsf.org

**Hotel Reservations &
Directions**
Concord Hilton Hotel
1-925-827-2000

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April 12, 2008

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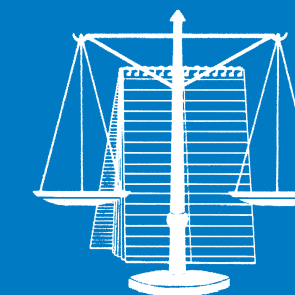
A NONPROFIT CORPORATION

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April 12, 2008

CONCORD HILTON HOTEL
1970 DIAMOND BOULEVARD
CONCORD, CA 94520



- ADMINISTRATION OF LIVING TRUSTS AFTER DEATH OF A SPOUSE
- APPELLATE PROCEDURES
- ATTORNEY ETHICS AND PARALEGAL PRACTICE AND CALENDARING
- BASIC CIVIL LITIGATION
- BEGINNING LEGAL SECRETARY
- DISCOVERY: TECHNIQUES, STRATEGIES, PLANS, PITFALLS
AND E-DISCOVERY IN COMPLEX LITIGATION
- FAMILY LAW

MCLE CREDIT: *The Bay Area Legal Secretaries Forum has been approved as a provider of MCLE credit by the State Bar of California. All programs are qualified for MCLE credit by the State Bar of California in an approximate amount of 5.25 hours. The Forum certifies that the designated activity conforms to the approved standards for education activities prescribed by the Rules and Regulations of the State Bar of California governing minimum continuing legal education.*