



CALDA *update*

SETTING THE STANDARD...EDUCATION, ETHICS, EXCELLENCE

Message from the President

Dear CALDA Members:

I am very happy to report that Governor Brown has signed AB 285. The changes made by this bill will now be the law as of January 1, 2016. Thank you to everyone who helped us to make this happen. I'd like to extend an extra special thanks to member Terri O'Connor for the special dedication she showed to the "Special Ops" that presented this opportunity to us.



Here is a link to the [AB 285 Fact Sheet](#).

We will have a discussion at the Conference about the changes and improvements this bill makes to our governing statute, and also on CALDA's plans for the future. Please join us there and register for the LA Conference.

Kind regards,

Ian Duncan

CALDA President

Mandatory MCLE

As of January 1, 2016, Business & Professions Code §6402.2 will dictate that an LDA shall complete 15 hours of continuing legal education courses during his or her two-year period. An LDA attempting to re-register will be required to attest to the fact that this education has been completed.

MCLE activity must relate to legal subjects. The upcoming conference is designed to provide legal access education in Family Law, Probate, Wills & Trusts, Civil Law, Property & Legal Ethics relevant to Legal Document Assistants, Paralegals, and members of the State Bar.

The conference will also offer classes in how to conduct a business that provides equal access to justice for all constituents demonstrating significant current professional and practical content. The materials presented in these activities are approved for MCLE credit and some classes represent content for required credit in legal ethics, elimination of bias, and competency issues. These classes will be free from interruption and are scheduled for over one hour. CALDA will provide substantive written materials relevant to MCLE activity. On-line content of this material will remain on our public website for 30 days.

GOALS OF THE PROGRAM

The outline and purpose of all classwork is to train a Legal Document Assistant (LDA), paralegal, attorney, or other non-attorney advocate such as a Social Security Disability Advocate to complete forms and to prepare documents relative to an established legal

issue or dispute acknowledged by a self-represented (pro per) constituent.

The legal statutes and doctrine referenced in these presentations are provided in attorney-approved material form for educational & information purposes. This is done in order to train the practitioner in assisting his or her constituent/pro per client with preparing the legal documents necessary to pursue the constituent's case. These resources are meant to be shared with constituent/client in their decision-making process when evaluating their facts to the elements of law necessary to form a basis for a legal issue.

ANNUAL ELECTION

For Voting Members NOT attending the conference, please fill out the proxy form posted on the CALDA website and return it by **October 2, 2015** to Marcel Neumann. All instructions are on the proxy form and instruction sheet. It is **very important** to cast your vote by proxy if you are not planning to attend the conference as we need a quorum to have an election. Please vote! Thank you.

[Nominee Statements](#)

[Proposed Bylaw Changes](#)

[Proxy & Instructions](#)

2015 Annual October Conference

CALDA's 2015 Annual Conference is nearly here. Sign up today at www.CALDA.org.

Schedule of Events

Friday, October 16, 2015

7:30 AM to 8:45 AM

Continental Breakfast & Registration

8:45 AM

Welcome by CALDA President, Ian Duncan, LDA

9:00 AM – 10:15 AM

TRAINING 1: Civil Litigation 803: Filing and Responding to a Lawsuit. Completing judicial council forms in filing and responding to a lawsuit with the focus on a breach of contract case.

Instructor: Chris Stefan, Attorney at Law (1.25 hours CLE)

Or

TRAINING 2: Family Law 105: X Spouse Program/Child Support Services Guidelines in Preparation of a Request for Order When Child support became subject to being a computer program in the 1990's, Commissioner Vogl taught how to use the Dissomaster to the Orange County Family Law lawyers in many sessions sponsored by the Orange County Bar Association Family Law Section. This class will be on how to use the similar X Spouse program and how to put in the information that will get the results most helpful to your clients.

Instructor: Orange County Superior Court Commissioner, Richard Vogl (1.25 hours CLE)

10:15 AM to 10:30 AM BREAK

10:30 AM – 12:00 PM Combined Training

TRAINING 3 - How to Run Your Own LDA Business 901 Step by step from a home office, virtual office or rental office, advertising your business, to keeping your

finances in order and how much to charge for your services.

Instructor: Carl Knoll, LDA

and

TRAINING 4: Introduction to LACE: Legal Access Education, CALDA's proposal to create a new paralegal school. This training will be presented directly after the previous class in the same room. CALDA proposes to create a paralegal academy to become a licensed, accredited, traditional paralegal program offering paralegal education. CALDA's goal is to educate the LDA workforce so LDAs may independently and effectively provide clients access to solutions to their legal problems. Increase the ranks of the LDA industry and increase CALDA membership. This interactive class will consist of a presentation with a question and answer period to follow.

Presented by Susan Volpe, CALDA's Curriculum Manager.

FOR THE PUBLIC: Free Document Preparation Clinic on Completing Conservatorship Forms

This is a free training for members of the public who need assistance completing conservatorship forms, especially with respect to Limited Conservatorships for persons with developmental disabilities. This class will be facilitated by several LDAs who are experienced at preparing conservatorships.

(MCLE/CLE = 1.5 for the Facilitators)

12:00 PM to 1:00 PM – LUNCH

1:00 PM to 2:15 PM

Keynote Address -- Connie Lapin and Dr. Harvey Lapin, Founders, Autism Society of Los Angeles

Connie Lapin – Co-founder, 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.

Harvey Lapin, DDS – Co-founder, Autism Society of Los Angeles

Dr. Lapin 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.

2:15 to 2:30 PM BREAK

2:30 PM– 4:00 PM

TRAINING 5: Wills, Trusts and Other Estate Documents 705: Administering a Living Trust after the Death of the Settlor Learn the process that is involved when the Successor Trustee of a Living Trust must administer the Living Trust after the death of the Settlor.

Instructor: Michelle Wehrli, LDA (1.5 hours CLE)

Or

TRAINING 6: General Conservatorships 501: Preparing a Petition for Appointment of Probate Conservator When an adult can no longer care for his or her basic needs, he or

she may need a court-appointed conservator. Conservatorships are very form intensive and procedural. Learn the form preparation and procedure for a general conservatorship.

Instructor: Ian Duncan, LDA (1.5 hours CLE)

5:30 PM – 9:00 PM Dinner and Annual General Meeting

Dinner Program:

- Awards
- Future of our Profession – Outline of AB 285 and Introduction to Saturday's Discussion Class by Ian Duncan, CALDA President
- Elections
- Annual General Meeting

Schedule of Events

Saturday, October 17, 2015

7:30 AM to 9:00 AM

Continental Breakfast & Registration

9:00 AM – 10:15 AM

TRAINING 7: Limited Conservatorships 503: Preparing the Forms in a Limited Conservatorship Proceeding. Generally a person qualifies as developmentally disabled if he or she has an IQ less than 70 or is diagnosed with autism. Other conditions can qualify too. This class will discuss the form preparation and procedure for being appointed as the limited conservator of a developmentally disabled person.

Instructor: Helen Bellamy, LDA (1.25 hours CLE)

Or

TRAINING 8: Family Law 104: Stipulated Judgments and Marital Settlement Agreements. 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 agreement.

Instructor: Laura McGee, J. D. (1.25 hours CLE)

10:15 AM to 10:30 AM BREAK

10:30 AM to 12:00 PM

TRAINING 9 Family Law 111: Form Preparation for a Petition to Establish a Parental Relationship Often parties who are not married have children and the purpose of a Petition to Establish Parental Relationship is for the Court to make orders as to the child's legal parents. It is necessary to establish parentage prior to one parent requesting custody, visitation or support orders.

Instructors: Judge Mark Juhas and Judge Michael J. Convey, Los Angeles County Superior Court (1.5 hours CLE)

TRAINING 10: Deeds 202: Inter-spousal, Trust Transfer, and Other Special-Purpose Deeds What makes a deed with specific title (such as inter-spousal or Trust Transfer Deed) different from other types of deeds? This class is a more intermediate to advanced-level class dealing with different types of deeds beyond your basic Grant Deed and will discuss finer points of transfer tax, reassessment, and exemptions and exclusions from transfer tax and reassessment. Also a discussion on the subject of capital gains tax, cost basis, carryover basis and stepped-up basis.

Instructor: Debra Burton, LDA (1.5 hours CLE)

12:00 PM – 1:00 PM LUNCH

1:00 PM – 2:30 PM

TRAINING 11: Wills, Trusts and Other Estate Documents 704: Essentials of Funding Living Trusts and Preparing and Filing a Heggstad Petition. Instructor: Galen Hammond, LDA (1.5 hours CLE)

Or

TRAINING 12: Notary Updates. Learn the updates that are involved with being a Notary Public; especially the new forms in Loan Signing/ Real Estate documents.

Instructor: Laura Biewer, Certified Instructor for the National Notary Association (1.5 hours CLE)

2:30 PM to 2:45 PM BREAK

2:45 PM – 4:15 PM Combined Training

TRAINING 13: Ethics LDA Ethics Overview: Avoiding the Unauthorized Practice of Law

while maintaining a thriving and helpful LDA Practice

Instructor: Kerry Spence, LDA (1.5 hours CLE)

and

TRAINING 14 LDA Practice Demonstration and discussion on LDA Practice

Instructors: Ian Duncan, LDA and Associates

(1.5 hours CLE – Meets the requirement for Ethics)

ANNUAL CONFERENCE QUICK FACTS

Friday, October 16TH – Saturday, October 17th, 2015

LDA Centric Continuing Legal Education

Earn up to 10 hours CLE

Holiday Inn Los Angeles International Airport

9901 S. La Cienega Blvd.

Los Angeles, California 94405

(310) 649-5151

Member fee: \$395.00

Non-member fee: \$450.00

Register at www.calda.org

Thank you to our Sponsors:



How to be an Immigration Consultant

By Peter Phuong Luong

I've been as an Immigration Consultant (IC) for more than five years but I did not carefully read the Business and Professions Code regarding this issue. I just followed the instruction from the executive office where enforce this code, which is the Secretary of State.

Recently, because there has been a surge of interest in being an IC, I decided that I should review the Code and write an article for CALDA's quarterly newsletter.

Immigration Consultant professional is found in Business and Professions Code section 22443.1 and below is the requirement of how to be an Immigration Consultant:

A prospective IC must obtain and post a \$100,000 bond from a corporate surety that is admitted to do business in California. The amount of bond was increased by double from July 1, 2014 which caused a lot of financial burden for those who wanted to continue or to start providing immigration services to the public.

A prospective IC also has to submit an Immigration Consultant Disclosure to the Secretary of State, which basically just provides them your information, address and states you are not a criminal. A prospective IC also has to have his/her background checked.

After you have prepared all of the above requirements, submit them all along with the following documents to the Secretary of State at the below address:

Secretary of State,
Special Filings Unit
P.O.Box 942870,
Sacramento, CA 94277-2870

- Copy of a current Surety Bond (\$100,000)(PDF) obtained from a corporate surety (admitted to do business in California).
- Completed Immigration Consultant Disclosure (PDF) form.
- Copy of a valid and current photo identification. Acceptable forms of photo identification are:
 1. An identification card or driver's license issued by the California Department of Motor Vehicles.
 2. A passport issued by the Department of State of the United States.
 3. An identification card issued by a state other than California.
 4. A driver's license issued by a state other than California.
- 2" x 2" passport photo.
- \$30.00 filing fee.

A renewal or continuation of an immigration consultant surety bond must be filed with the Secretary of State prior to the expiration of the surety bond. If the renewal or continuation is not filed with the Secretary of State prior to the expiration of the surety bond, the person covered by the bond may not engage in the business or act in the capacity of an immigration consultant until he or she again has complied with all of the qualification requirements, including the submission of a new surety bond, disclosure statement, and the passing of a background check. Surety bond continuation certificates or similar documents purporting to renew surety bonds that are received after the expiration of the applicable surety bond will be returned unfiled.

One of the funny things about B&P Code section 22443.1 is that no education or training is required for first registration or renewal of registration!

MEMBERSHIP

Welcome New Members

Brandy Adams
Dana L. Clark
Valerie Coleman
Charlotte Collins
Gloria Echevarria
Michael Garcia
Lance Surety Bond Associates, Inc.
Christina Marquez
Elizabeth Robinson
Monica Simmons
Narinder Singh Braich
Victoria Sotva
Ann Spiratos
Antonette Thomas
Roxann Villareal
Melinda Williams
Jim Wilroy

CALDA wishes to congratulate our three Conference Scholarship recipients:

Angela Angelovic

Robin E. Jones

Charlotte E. Collins



'Separation Date' in Dissolution of Marriage Cases

By Regina Van Hecke
CALDA Legislative Chair

Supreme Court Ruling Regarding 'Separation Date' in Dissolution of Marriage Cases

On July 20th, 2015, the California Supreme Court ruled that married couples going through a divorce are not considered separated for the purpose of dividing assets and debts until one spouse physically moves out of the shared home. This unanimous ruling reinforces a "bright-line rule," which makes the establishment of individual residences the minimum requirement for the legal definition of when a couple is separated and income and property are no longer shared. (A bright-line rule is a clearly defined rule or standard, composed of objective factors, which leaves little or no room for varying interpretation. The purpose of a bright-line rule is to produce predictable and consistent results in its application.) "A bright-line rule ... promotes fairness by providing a measure of predictability to the parties and their attorney, as well as clear guidance to judges," Chief Justice Tani Cantil-Sakauye wrote. "It reduces the potential for manipulation of a more elastic standard by the higher earner in situations of significant income disparity."

This ruling was brought about by a [case that involved a Sheryl and Xavier Davis, a Castro Valley couple](#), who were disputing over spousal support in their divorce case. Sheryl Davis claimed she and her husband, Xavier Davis, formally separated in 2006, when she declared the marriage over and they began living mostly separate lives. Though they drove separately to their children's events, took separate vacations, and had divided all of their finances, they still continued to live under the same roof. Xavier, on the other hand, argued that their separation began in 2011, on the day that Sheryl physically moved out of their home.

Initially, a Superior Court judge and the First District Court of Appeal in San Francisco agreed with Sheryl Davis and her request that the date of separation be based on a 2006 date that reflected a time when the couple had separated finances and no longer lived as a married couple, but rather as

roommates. However, the case was taken to

the Supreme Court, who disagreed with the lower courts. The court said that "living in separate residences is an indispensable threshold requirement for a finding that spouses are living 'separate and apart' for purposes" of dividing property."

This bright-line rule poses potential challenges for couples who wish to remain in the same house for economic or family reasons. In today's economy, many couples are choosing to continue living under one roof as roommates in order to save money and/or to keep the family together for a time while transitioning into separate households. Lila Duchrow, Sheryl Davis' attorney in the

"A bright-line rule ... promotes fairness by providing a measure of predictability to the parties and their attorney, as well as clear guidance to judges,"

case, told the court that "a typical spouse in California, for example, may face further financial difficulties by being required to move out of the marital residence as a prerequisite to establishing the date of separation rather than intentionally and meaningfully living as roommates at the same residence."

This ruling was made after careful consideration of the history of California's statutory community property scheme as defined in Section 771(a). The language in the statute originates from a predecessor statute that was enacted 145 years ago in 1870 to protect 'the rights of married women in certain cases.' The 1870 Act provided that the earnings of the wife, 'while living separately and apart from her husband' were

not liable for the debts of her husband and were the earnings and accumulations of the wife. The 1870 Act did not contain a definition of the phrase "living separate and apart." The phrase "living separate and apart" had been considered ambiguous in the past and has been used flexibly for many years. For example, many couples could previously consider themselves separated if they lived separate lives as single persons regardless of whether or not they lived under the same roof. This new ruling does not easily allow for these types of common situations if there is a dispute about the date of separation.

To possibly confuse matters more, the Supreme Court left open the question as to whether parties could be living in separate residences even if they are still living under "the same roof". This might be referring to situations where a partition or some sort of divider establishes two homes from what was once one. Justice Goodwin Liu wrote that there could be circumstances in which a divorced couple could live under the same roof and be considered "separate and living apart." "The spouses must have a living arrangement that clearly and objectively signals a complete and final termination of the marital relationship," he wrote. "Neither the Legislature nor this court has foreclosed the possibility that such a living situation may occur within a single dwelling."

This new ruling means that for many individuals who now wish to file a Petition to open a divorce case, the listed 'Date of Separation' may need to be left unknown or "to be determined" if they are still living in the same home as his or her spouse. This rule has not been in place long enough for us to see the possible outcomes for couples living in the same home who wish to finalize a divorce case.

Obviously, if these couples can agree on a date to use for this "date of separation" then it would be a nonissue for their case. Given that most LDA's are helping clients who are seeking to resolve their divorce cases outside of court, this new ruling does not seem likely to prompt any big changes in the way most LDA's have been helping clients fill out Petitions for Dissolutions of Marriage. Given this new definition, we may see more clients choose to use 'TBD' (to be determined) as an initial answer for the 'Date of Separation' section of a Petition for Dissolution of Marriage until both spouses can agree on a mutual date.

In the Spotlight: CALDA's Bay Area Chapter

Helen M. Bellamy taught at the Bay Area Chapter's August meeting. The topic was "Small Estate Probate - Transferring Personal and Real Property Under \$150,000".



Check out the next Chapter Meeting near you. You will learn something new while building relationships within our profession.

CHAPTER NEWS – OUR LOCAL CHAPTERS ARE GROWING!



Bay Area Chapter

The next Bay Area Chapter meeting will be November 19, 2015 at noon. We will be 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 at Family Legal Document Services and the topic will be Estate Planning. The Chapter meets the third Wednesday of the month. Our meeting location varies, please contact Chapter president, 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

Central Valley Chapter (cont.)

10-22-2015 – Exparte Custody Requests – Terri McCracken, Attorney = 1 unit MCLE

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

12-17-2015 – Holiday Get-Together



North Bay Chapter

Upcoming topics for the North Bay Chapter are:

- October 13, 2015 "Estate Planning" Judy Reyes
- November 10, 2015 "Technology and Software for LDAs" Judy Reyes
- December 8, 2015 Christmas Holiday Gathering

We will meet in the Solano Community Foundation Conference Room located at 470 Chadbourne Road Suite D, Fairfield, CA 94534. The date is always the 2nd Tuesday of each month from 12:00 to 1:30pm.



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).

Revocable Transfer of Death Deed (RTDD)

What are the disadvantages of using a RTDD?

By Regina Van Hecke
CALDA Legislative Chair

Assembly Bill 139 has been signed by the Governor and will take effect January 1, 2016.

This bill amends Family and Probate codes to include a 'Revocable Transfer on Death Deed' (RTDD) as a method of transferring title of real property to named beneficiaries. The use of this type of deed may be beneficial for certain people, but it also has its drawbacks.

How does this deed work?

A Revocable Transfer on Death Deed (RTDD) can be executed by people who wish to transfer title of ownership for real property upon death. This new RTDD would effectively name a "transfer on death" beneficiary who would be able to easily obtain title after the grantor's death. This document works similarly to "payable on death" beneficiaries named on financial accounts. Until this bill was passed, no such deed allowing a person to name a beneficiary for real property has existed. An RTDD creates a new option for people who wish to designate beneficiaries for their home before they die, but to be effective after they die.

What are the advantages of using a RTDD deed?

For people who are looking for a very simple solution to passing title/ownership upon death, this deed may be a viable option. Though it has its drawbacks, this deed may be appropriate for a person who cannot afford to create a revocable living trust and who wishes to name a beneficiary for a home in a document other than a will. If an RTDD is created, the transfer on death beneficiaries can avoid probate for this transfer, regardless of the property's value. This creates a much simpler process for anyone seeking to spare their beneficiaries the probate process. The RTDD is also a much safer option than creating a joint tenancy and sharing ownership during the lifetime of the grantor because the grantor retains full ownership of the home until he or she dies.

Unfortunately, an RTDD does not allow for a beneficiary's share of a home to be distributed to his or her "issue" if a named beneficiary pre-deceases the grantor. An RTDD may have multiple beneficiaries, who take in equal shares as tenants in common, but does not provide for alternate beneficiaries. In other words, if a beneficiary pre-deceases the grantor and the RTDD is not updated before the grantor passes away, then the named beneficiary's estate or children do not receive any portion of the deceased beneficiary's share, as is otherwise common in estate planning. The deceased beneficiary's share is subsequently divided amongst any other then-living beneficiaries named on the RTDD. This may not pose a problem for a person, who, for example, may want to create an RTDD that grants ownership of a home to multiple children and does not wish for a beneficiary's share to go to his or her "issue" if a beneficiary pre-deceases the grantor. However, in my research for this story, I have found that most clients who do wills and trusts do not usually exclude their grandchildren as alternate beneficiaries in the fashion that this new instrument will require.

Other issues arising from the lack of alternate beneficiaries include that, when a grantor only has one child and that child predeceases the grantor, then this type of deed will create a problem and probate will be necessary because at that point there are no other named recipients. Furthermore, an RTDD does not allow for class gifts (ex. unnamed grandchildren) as wills and trusts do.

Something to also note is that a property subject to an RTDD is still considered part of a transferor's estate for purposes of Medi-Cal eligibility and will be subject to Medi-Cal reimbursement claims.

Revocable Transfer on Death Deed (RTDD) vs. Trust Transfer Deed (Living Trust)?

Galen Hammond, a long-time CALDA member and LDA who offers estate planning document preparation services to both attorneys and self-represented individuals, states that "an RTDD (in combination with a Will) could be appropriate for individuals who do not wish to create a living trust for their

estate. While a revocable living trust is far more comprehensive in terms of beneficiary designations, and covers multiple categories of assets, an RTDD would only affect the real property covered in that deed. Some people may prefer the simplicity of an RTDD and Will combination, especially if the only major asset is that person's home. However, it is very important that clients fully understand the pros and cons of both an RTDD and living trust, and I would strongly encourage an attorney referral for legal advice if a client asks for an RTDD. Generally speaking, living trusts offer a lot more flexibility for the client, and there is a lot more published legal information on them."

How might LDA's incorporate an RTDD into the estate planning options that are offered to clients?

As suggested, LDA's could offer a simple Will/RTDD package for clients who may not otherwise choose to create a living trust. However, it is extremely important that clients clearly understand the differences, pros, and cons of each of these estate planning documents. Clients need to be aware of their options and make an educated decision based on their specific needs.

CONNECT WITH CALDA

CALDA is on Facebook



Just click on the link above to join us on Facebook.

ELECTIONS

Officer Candidate Statements

Ian Duncan - President

Dear CALDA Members:

I would be honored to have the privilege of being reelected as your President. In the last two years, we have made tremendous progress together in many areas, and we must continue our work.

Members, we are on the right track now, but there is more work to do. You and I started this term together by creating of the CALDA's Curriculum, which dramatically raised the quality of our cherished education. Together we lifted the stature of our organization because we discovered that no one was better suited to deliver that education than ourselves -- Legal Document Assistants. Gone are the days when we look up to lawyers as the main providers of our education as if somehow they know our work better than we do. If nothing else, I hope that our work together has improved the collective self-esteem of our profession.

We continued together with successfully shepherding the first LDA-related legislation (AB 285) in 15 years, which has raised our visibility in a positive way and also improved our daily lives by taking away onerous barriers to our doing our work. Mandatory Continuing Education will challenge us to keep the quality of our education high and it will increase our ranks because LDAs will be further incentivized to join CALDA.

Finally now with the creation of Legal Access Education, (LACE), CALDA proposes to create a licensed, accredited, paralegal program. LACE's goal is to educate a new LDA workforce so LDAs may independently and effectively provide clients access to solutions to their legal problems. This program will also greatly assist us with our outreach to other groups as they see the worth of the education we are capable of providing their constituencies.

I'll look forward to seeing you at the Los Angeles Conference, where we will continue our work together.

Kind regards,
Ian Duncan
CALDA President

Carol Ludlow - Treasurer

Why do I want to continue serving as CALDA's Treasurer? Because it is not just a part-time job, that I am totally committed to but a labor of love; it is my way of giving back to this wonderful Association, that has given me so much throughout the years. I thank all of its amazing members, many of whom have become very dear friends, for allowing me to serve as Treasurer for as long as I have. I do serve at the pleasure of the membership and I will continue to serve this association as long as my services are required.

Galen Hammond - Treasurer or Director

I am running for the position of Treasurer / Chief Financial Officer for CALDA because I wish to my part in helping CALDA, and our profession, continue to grow in the 21st century.

I previously served on the Board from February 2010 through February 2012, and I have been a member of CALDA continuously since September 2008. Since I last served on the Board, I have been involved in the local Los Angeles/Orange Counties Chapter as Secretary / Treasurer.

When I was a new member and LDA, I received a lot of help, guidance and good advice from the more established members of CALDA. In turn, as I have become more established, I have always done my best to extend a helping hand to the newer members and to give back the same level of help, guidance and advice that I received when I needed it most.

If elected as Treasurer/Chief Financial Officer, I pledge to not only continue giving back to CALDA's members as I have done in a private capacity, but to also do perform the official duties of the office in as an open, fair and consistent manner as possible.

Board of Directors Candidate Statements

Tyler Gross - Director

I believe that I would be a good candidate to be reelected as the public relations chair due to the fact of my availability, knowledge, the work that I have already done and that I have a degree why an emphasis in Public Relations. This position comes with numerous responsibilities. Availability, organization, punctuation, and computer literacy.

A person must be available and being an owner of my own company gives me flexibility to alter my schedule as needed.

Organization is top key to any profitable organization. I set calendars and schedules to make sure that I followed through and nothing gets forgotten.

Punctuation, being on time for deadlines and meetings is an important quality for a business characteristic. Expresses dependability and responsibility.

Computer literacy, is essential in marketing and public relations. Currently, cell phones and computers are today's methods of communication.

Being computer literate allows me various tools to get my work done, communicate and service all of my responsibilities this position will require of me.

I constantly participate in group's discussions and promote being enrolled in CALDA. CALDA brings and offers security for all of us Legal Document Assistants. An LDA must always protect themselves against violating the law and ethics. Through involvement in discussions, allows me to learn and help other LDA's stay with in legal boundaries.

I have a passion and good communication skills and would consider it an honor to be allowed to fill this seat.

Board of Directors Candidate Statements

Continued

Maureen McCready - Director

It would be my pleasure to continue serving on the board if that is the desire of the Membership. Working with the Board of Directors is a privilege that I appreciate deeply and, in my capacity as a board member, I will always endeavor to provide support to others serving on the board as well as to work toward furthering the expansion and awareness of our profession.

Peter Phuong Luong - Director

I was appointed by the Board as a Newsletter Director back in April 2015. At first, I was very excited for having an opportunity to build the association that has meaningfully contributed to my career. Eventually, I was struggling to balance my time at work, at home as a father of 3 very little kids and I was about to quit or not to run for Director at this year's conference.

It took me a long time to decide to run for a directorship since my conscience did not allow me to quit and it asked me it's time to pay back, to contribute and to do whatever I can to make CALDA great since without CALDA, I cannot build my career, my profession as a LDA as of today.

I hope to have more opportunity to serve CALDA in the year to come.

Julie LaBlanc - Director

I would like to be nominated as a CALDA Board Committee Member as I think it is important to have an organization with a broad demographic mix. My goal is to

continue to contribute to the CALDA members by being available as a resource for our new member match program, actively solicit vendors and sponsors for the Annual Conference, and provide any additional assistance as needed by the CALDA Board. I have been a registered LDA for 3 years, a current Board Member for the past 2 years and I am active in the Bay Area Chapter monthly meetings. Serving on the Board for the past two years has been an enjoyable, learning experience for me and I wish to continue to help in this capacity.

ANNUAL ELECTION

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[Proposed Bylaw Changes](#)

[Proxy & Instructions](#)

Elizabeth Fleischer - Director

Elizabeth (Liz) Fleischer has been a CALDA member since October, 2006 and is the Owner of A Legal Bridge Attorney Support and Self-Help Center in Chico, California. She assists self-represented litigants as a registered and bonded Legal Document Assistant, and she assists attorneys with their caseloads as a paralegal.

Liz was appointed to the CALDA board in January, 2012 as the Fundraising Chair, and she assembled an array of products that were sold at the 2013 and 2014 Annual Conferences. She then served as the Publications Chair, where she assisted in the

updating of the CALDA Brochures and Questionnaires that CALDA members use for their Businesses and clients. Liz was elected to a second two- year term and is currently serving as the Conference Chair for the 2015 Annual Conference assisting with and overseeing the whole event where CALDA members get an opportunity to network and get their required continuing education credits. She thoroughly enjoys the work of the Board and hopes to continue in helping to provide a great organization for the members and their clients.

Prior to her membership with CALDA, Liz worked as a Legal Secretary for Legal Services of Northern California, a Legal Aid Office run by the State of California, and as a Library Assistant for the Butte County Law Library. She also worked at Catalyst Women's Advocates, a shelter for victims of domestic violence assisting with temporary restraining orders, and at Parent Education Network, a Court Referred Social Service Agency as a Child Care Provider for children considered to be at risk for Abuse and Neglect.

Liz completed an AS Degree in the Legal Assistant (Paralegal) program at Shasta College in Redding, California in May 2004, and has as a Bachelor Degree in French from California State University, Chico. She also enjoys bicycling, music and reading.

Carlo Perez - Director

I am honored for the nomination, and I accepted it in the spirit of gratitude. CALDA has helped me jumpstart my LDA career, and I would like to give back to the association by serving in the board if the membership will give me the opportunity to do so. I would like to serve as a director on the CALDA board to be actively involved in our organization in our efforts of promoting our LDA profession and getting public awareness and respect of the LDA as a non-attorney option to meet the legal service needs of the people. I also want to help create more opportunities for learning and networking for LDAs, not only in the local chapter that I am serving, but in other parts of the state as well, so that we can all grow professionally, be experts in our field (forms preparation) and make the LDA a respected profession in the community.