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43RD
CONFERENCE
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Peppermill Resort, Reno, Nevada September 23-25, 2011



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California Association of **Legal Support Professionals**

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Register now to join your fellow Legal Support Professionals at this year's Conference at the Peppermill Resort in Reno, Nevada, September 23-25.

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September 24, 2011 – *Reno*

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ello friends, it's conference time once again and I want you to know how great it would be to see you there and help shape the future of our association and this profession. I'd like to share with you a story about my very first conference and the difference it has made in my life and business.

Back in early 2000, I attended my first CAPPS conference in Las Vegas, NV. My wife and I figured "it's Vegas" so why not go and see what CALSPro is all about. At the very least we can always head to the casino!

During the general session part of the meeting, President Mark Schwartz challenged members to get involved and step up and make a difference. His words resonated with me and I soon became an area governor for the Kern, Kings, Fresno and Tulare Counties. Before that time, the thought had never even crossed my mind to serve on a committee, be an area governor or run for office. Since taking that first step and getting involved, my business has grown and subsequently my profits as well. The relationships I have made through CALSPro have paid dividends in both my personal and professional life. Not only have I strengthened business relationships over the years, but have made many close personal friends. Remember, life's happening all around you, it's how you live life that defines you!

With that said, I want to give you my top 5 reasons you should attend conference this year.

REASON #1 - Value

If you attend only one conference this year, the CALSPro Conference is your best value! CALSPro offers the most extensive and diverse educational programs for the legal support professional like you. Our speakers are seasoned professionals and bring a wealth of information. You will gain new knowledge and sharpen your skills enhancing your expertise and strengthening your business.

REASON #2 - Networking

You'll be hard pressed to find a better place where you can meet and develop a network of legal support professionals, vendors and experts. Start at the continental breakfast before the morning session, mingle with others between sessions, chat with vendors as you stroll through the exhibit hall and learn from fellow colleagues during lunch. It's not often that you get the chance to have this many opportunities to build your network in such a short period of time!

REASON #3 - Education

Hear the latest facts and trends in our profession. Discover over 2,900 of our online educational opportunities prepared especially for CALSPro members. Attend the CALSPro Certified Process Server refresher course and get (or renew) your CCPS designation. Whether you're looking for information on the latest and greatest or you want a more in-depth knowledge of a specialized topic, we have what you're looking for!

REASON #4 - Rejuvenation

You work really hard all year long. This conference is a great opportunity to get away while still investing the time in yourself, your company and your future. What a fantastic location to rejuvenate while still furthering your business and professional goals.

REASON #5 - Fun. Pure and simple.

One of the reasons we work so hard is to be able to really enjoy a slice of life. Reno is one of the most popular conference destinations in the U.S., and it won't take you long to figure out why. Beautiful mountains, fresh clean air, the spa, a variety of local dining and entertainment choices and don't forget the gaming opportunities!!!

It's Reno and we would love to see you there!



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CAPITOL REPORT

MICHAEL D. BELOTE, ESQ.





A Judicial Branch In Crisis

he parallels between Washington, D.C. and Sacramento are just breathtaking. Basically it is impossible to discuss issues pending in either venue without getting into budget and debt matters. Both the state and federal systems are polarized and dysfunctional, and both systems feature Democratic chief executives who have tried without success to craft solutions involving both cuts and "revenues." Both systems also feature moderate legislators who are facing criticism from the right and the left, making compromise difficult or impossible. And, both systems are leaving voters fed up!

For the purposes of CALSPro, the focus of the debate here in California is on the courts. In the past two years, general fund support for the court system has declined by approximately 30%. This year's general fund cut is \$350 million. At a recent meeting of the Judicial Council, the Administrative Office of the Courts were told to absorb cuts in the range of 12%, while the Supreme Court and courts of appeal took a share of approximately 10%, and trial courts lost between 6% and 7%. The net reduction to the trial courts for the current fiscal year which began on July 1 is \$135 million.

Determining the allocation of the \$135 million cut to the trial courts is not difficult. Each court will be forced to absorb its proportionate share of the total. Los Angeles, for example, represents just under 29% of the trial court system, amounting to a cut of approximately \$38 million. The

Judicial Council has a chart representing the share each court represents of the entire system, and the cuts are figured arithmetically.

Determining the impact of the cuts is far more difficult, because each court faces unique circumstances. Some have cut more in prior years, each has different pay scales and union contracts, and reserve amounts vary widely. Now that the \$135 million figure has been decided, each court is busy assessing the options for covering the loss.

We do know a few things, however. First, the impact of the cuts will be determined locally; there is no plan at this point for statewide court closures. Second, the civil system will bear the brunt of the cuts, as criminal trials, family law matters and others necessarily must have priority. Third, each court will have a different response to the cuts, whether by staffing changes, hours of operation, courtroom closures, or others. Fourth, and perhaps most ominously, unless something dramatic changes, next year could see even deeper reductions.

For the current fiscal year, the situation in the San Francisco Superior Court probably has received the most publicity. The presiding judge has announced an intention to lay off a staggering 200 employees, or 40% of the staff, and terminate 11 of 12 court commissioners, and close 25 courtrooms. If fully implemented, it is possible that as many as 14 of the 17 courtrooms currently

3

dedicated to civil matters will be closed. Obviously, time to trial will be lengthened dramatically and the civil system as we know it will change drastically.

Meetings are occurring with judicial branch leaders even as this column is written, to explore options. CALSPro members will hear the word "restoration" used; this refers to efforts to be undertaken with the legislature to restore previous cuts. Of course, the court system will not be the only governmental activity seeking to restore cuts taken in recent years. But, the Chief Justice and others will point out, this is more systemic than cutting programs of government. There are many worthy programs which have suffered cuts, but we are talking about a co-equal branch of government, literally a pillar upon which our democracy rests.

Options will be evaluated also during the final four weeks of this legislative year. The legislature returned from its summer recess on Monday, August 15, and will adjourn for the fall on Friday September 9. Will there be legislation to address the San Francisco situation? Will further fee increases be considered? Stay tuned.

That, along with supporting court funding to keep the courts open and accessible, and monitoring dozens of proposed changes to rules of court. The fun never ends!

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MEMBERSHIP HAS ITS PRIVILEGES

by Larry Kirlin

Membership Committee Chairman

have often wondered how legal support professionals that are not CALSPro members become informed of the important changes in the laws each year. CALSPro has been my source for this type of information for many years now, and I know that I, along with many of you share this information with non-members all the time. This is a very good thing for our profession; however, I can't help but think that if these non-members were to join CALSPro and take advantage of all that membership has to offer, it would have a very positive impact on all of us. Whether you realize it or not, CALSPro has consistently provided benefits for all members of the legal support community

for over 40 years, regardless of whether vou are a member or not.

So why join CALSPro? Perhaps belonging to your state association keeps you more closely dialed in to the pulse of our profession. You are in the know more timely than non-members, and do not have to rely on others to keep you well informed.

Maybe you feel that it is good karma to give back to the association that has protected this profession from adverse litigation over the years, and has even worked with our state representatives in sponsoring proprocess serving bills.

Quite possibly, the relationships cultivated by networking with other CALSPro members has been the driving force behind your growth and success as a legal support professional; and if you want even more success, then it may make sense to get even more involved with CALSPro by joining a committee or even registering more of your key personnel as CALSPro members.

I am constantly reminded of the value of my membership, which has returned dividends worth much more than the costs many times over. Here are a few examples

Continued on page 7



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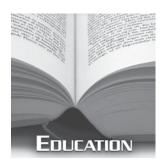
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CONTINUING EDUCATION REPORT

by Cliff Jacobs

Continuing Education Committee Chairman

Online Education to Be Demonstrated at CALSPro Annual Conference in Reno

K, so it's Sunday morning at conference and you've had a really great time thus far. The banquet was fantastic, and afterwards - "What happens in Reno...." What better way to glide into the conference home stretch than to get a real time glimpse into the online educational opportunities available to CALSPro members and their staff. On Sunday morning from 10:15 am through 11:15 am, you will have a unique opportunity to observe and participate in the first 15 minutes of three of the over 2000 online course opportunities available on the CALSPro website. The 3 programs to be introduced and demonstrated are:

MICROSOFT EXCEL

How many of us have been exposed to and have used Microsoft Excel, but wish we had a greater knowledge of its full capabilities. We will actually demonstrate and begin the Excel 7 hour learning module on the CALSPro website. Imagine the incredible value of enhancing your knowledge of (or your staff's know how) and ability to more

fully utilize this widely used program. The productivity increase would offset the meager cost right away, and you would realize the benefits for years to come. There is a multiple choice Final Examination that will give you a certificate of completion upon achieving a grade of 80% or greater that you can print directly to your personal printer. Estimated program length: 7 Hours. Cost: only \$25.00

PREVENTING HARASSMENT AND ILLEGAL DISCRIMINATION FOR CA SUPERVISORS – AB1825 COMPLIANT

Harassment and discrimination are costly to organizations. Everyone is affected by the negative consequences of a workplace that allows harassing and discriminatory behavior. This e-learning course is designed to inform managers and supervisors of their legal obligations and their critical role in ensuring a harassment-free workplace. We'll discuss the laws that govern discrimination, harassment and retaliation; define these behaviors; outline the obligations of employers and employees; and describe

the role of the supervisor in preventing harassment and discrimination. Estimated program length: 2 Hours. Cost: only \$25.00

TIME MANAGEMENT – STRATEGIES FOR SUCCESS

Break the 20/80 rule of getting results with less time. Control or eliminate time wasters and procrastination. Design your personal action plan to focus on high payoff activities at peak times for optimum use of your time. Avoid burnout and enjoy high energy levels every day.

Target Audience: Executives, Managers, Staff, and anyone wanting to improve their time management. Estimated program length: 2 Hours. Cost: only \$25.00

I look forward to seeing you at Conference and hope that you will take advantage of this wonderful opportunity to preview some of the great online educational programs available through CALSPro.

CCP5 Exam to Be Given in Reno at the Annual Conference

n Sunday morning September 25, 2011 at 8:30 am there will be a 25 minute review for the CCPS Exam. This review will include a 2-sided study guide and cover material including process service timelines and the basic codes servers need to know, as well as general process serving information. The exam will begin at 9:00 am sharp, so if you are going to skip the review please plan on arriving 5 minutes early. The exam consists of 50 multiple choice questions, and you can earn the highly coveted CCPS designation with a score of 40 or more correct answers. The CCPS designation expires after 2 years; however, you may receive a 1 year extension before being required to test again by attending a CCPS workshop (while you are still current) in either of the 2 years following the year you earned your designation. Put your thinking caps on and I'll see you in Reno!

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MEMBERSHIP HAS ITS PRIVILEGES – continued from page 5

of how my membership has benefited my business in just the past few weeks:

- Referred to my CCPS workshop notes to answer questions about a difficult serve.
- Obtained a quote for E&O insurance from a CALSPro vendor.
- Inquired with other CALSPro members re: the legal basis for sub-service at CMRA; which ended up being a big deal to my client. The information I obtained from these CALSPro members was invaluable.
- Arranged overflow coverage in a remote area through a CALSPro member, who treated me more like family than a competitor. I notice that CALSPro members have a sense of belonging to something bigger than themselves (our profession) and treat each other very professionally as "friendly" competitors.

So if you work with or know someone who isn't currently a CALSPro member, please consider inviting them to join and be a part of this great association along with you. Can you think of a better group of legal support professionals to be a part of?







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GREETINGS FROM THE CONFERENCE CHAIR!

by Stephanie Sayler 2011 Conference Chairperson

September 23, 24 & 25 - The Annual CALSPro Conference in Reno Is Offering a Full Plate This Year!

eno will be hopping and so it will not only be a very educational conference, but an exciting one. Our keynote speaker this year is Michele Stuart, a notable private investigator who has provided presentations with attendees from such formidable organizations as Homeland Security, US Marshals, FBI, Department of Justice, Attorney General's and numerous other levels of both State and Federal agencies. The information that she will share with us will allow us to be more successful at our jobs – finding people and serving them. She will share research tactics that we can all utilize to be more valuable to our clients and to increase our profits. She is one of three instructional and expert speakers we have the great opportunity to learn from at Conference.

Eric Vennes is an elected Director to the NAPPS Board and we have the opportunity to learn from his extensive knowledge base. Mr. Vennes founded the second largest process serving agency in the State of Washington and has been the recipient of the prestigious City of Seattle Mayor's Small Business Award. Upon selling his business in Washington, he has entered into another important arena to our industry – insurance risk management and business practices. We look forward to learning from his expertise.

Gretchen Lichtenberger is an expert in the field of locating witnesses and defendants via their mail receptacles. No one can

hide behind their government or private mailbox any longer, as Gretchen has discovered the key to lock down a box and deny access to mail. With the knowledge and the right tools, one can force a box holder to complete a revised application and provide proof of their current physical address. Come to conference and learn from Ms. Lichtenberger that no mailbox is a safe house.

In addition to this line-up of incredible speakers, we have entertainment and fun for our members! Please don't miss our Friday Night Welcome Event held at Pinocchio's this year, and the shuttle transportation is being provided by one of our sponsors! Pinocchio's Bar & Grill is a local favorite and has just recently moved into a new, 2-story location that will feature a live band, great food, libations and camaraderie. You will have ample networking time to re-connect with your friends and new associates in a relaxed atmosphere.

It's Street Vibrations in Reno conference weekend (this is the 4th largest motorcycle event in the nation, complete with fireworks, finest custom bike builders, high-end professionals in the industry – don't think Hells Angels, think Concours d'Elegance of the bike world). Our conference will be taking you into Reno to join in this excitement. And if motorcycles do not impress you, then you have many other options:

National Automobile Museum
 Features a Stutz Bearcat and the 1907
 Thomas Flyer that won the New York to Paris auto race.

Visit http://automuseum.org/

Nevada Museum of Art (Modern)
 Features a Fog Garden, Human powered wooden horse, Large-scale sculpture made of a thousand small kites.

Visit www.nevadaart.org

• **River Walk Merchants** – Beautiful boutiques, wine bars, bistros and pubs.

We will continue to have our popular golf tournament on Friday morning, so bring your sunscreen! Please don't miss your opportunity to take the CCPS (CALSPro Certified Process Server) examination review, followed by the exam on Sunday. We also have an additional educational opportunity to learn more about the online programs offered through CALSPro. Our variety of exhibitors will have comprehensive displays of their recently released services, tools and goods to keep you at the top of your game. And if you like games, Reno is a destination resort for gamblers who like to challenge the casinos and win!

Please support your industry and attend conference this year in Reno. If you would like to extend even further support, please

Continued on page 9



FROM THE CONFERENCE CHAIR – continued from page 8

peruse the sponsorship form provided to you in the Conference Brochure. This event is also a marketing opportunity to introduce your company to other members, so please get your name out there on our sponsorship boards. Also, I would like to see you in person, so you are not just an e-mail address or voice over the phone.

As leaders of the industry here in California, our association supports our professional businesses to thrive and grow. Our theme this year is "Sell, Service & Succeed" and we are here to help you accomplish that goal. Please become active in your industry and a step in that direction is attending this year's CALSPro Annual Conference!

See you in Reno in September!
Stephanie Sayler, Conference Chairperson

The Peppermill Resort

will host our conference this year. The Resort is located at 2707 South Virginia Street, Reno, NV 89502.

The Peppermill Resort Casino

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Room Rate: \$69.00/\$139.00 for Pepperrmill Tower; \$109.00/\$179.00 for Tuscany Tower. Cut-off Date: **Tuesday, September 7, 2011.** Please contact the hotel directly and ask for the CALSPro rate.



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In Memoriam: Edward R. (1928 - 2011) and Harriet (1924 - 2011) Wasserman

e are saddened by the loss this year of Ed and Harriet Wasserman. "Ed was one of the GIANTS of our profession," says Tom Bowman. "I learned a great deal from him and I loved to talk to him on the phone, but had lost touch with him since he stopped serving, so he could take care of Harriet." Tony Klein said about Ed's passing: "I am too saddened by the news about Ed. He certainly made CAPPS meetings lively "back in the day."

When I worked at my Dad's company, PLS in San Jose, we used Ed's company to serve our documents



in the Palm Springs area, and did so for many years. I really didn't know him very well personally but I do remember he was not afraid to speak his mind!

Ed was a recipient of the Bert Rosenthal Memorial Award in 2000. His wife Harriet was a member of CALSPro as well. The two of them were pioneers of this industry and helped countless other members become what they are today. They will be sorely missed. Godspeed Ed & Harriet!

— Mark Schwartz

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43RD CONFERENCE

Peppermill Resort & Casino, Reno, NV September 23-25, 2011

2011 Bert Rosenthal Memorial Award

by Mark Schwartz

Rosenthal Committee Chairman

he Rosenthal Committee meets yearly (eight of us met in June) and in a rigorous, sometimes emotional process, nominates those who it feels have given the utmost of service and dedication in promoting and protecting our industry. The committee consists of the current president, past presidents (who are still members) and all past award recipients.

The first Bert Rosenthal Memorial Award was awarded to Bert himself, In Memoriam, in 1978. Bert was one of the founding members of CALSPro and as such, is represented by one of the thirteen diamonds in the pin that hopefully will be presented to one of the below nominees at this year's Conference. In 1979, the tenth anniversary of our Association, his wife Dorothy wrote: "During Bert's initial years in the process serving industry, he dreamed of the time there would be an Association of Professional Process Servers. Certainly his dream was realized, and gratefully, he did live to see its emergence as the prestigious organization that it is. Bert truly loved the industry and he put so much of himself into it. Were he here on this 10th Anniversary, he would be so proud of all of the accomplishments of CAPPS. For Bert, I can only say "Congratulations CAPPS for a job well done." Dorothy wrote those words over thirty years ago, yet they still ring true today, don't you think? Bert would be oh so proud of us, and what we have become, and I'm not referring just to the Association, but also to the individuals he befriended and mentored. Today, due to the legacy of those individuals, and their legacy, and theirs, Bert's legacy is even more impressive. Jerry Topolos summed it up nicely in his 1978 award speech. He said: "We are not only honoring a man. We are honoring those who will be recipients in the future. The Association has come along way, and we feel it's about time the energies and contributions of certain members were recognized and recorded for posterity."

I'm honored to present to you the Bert Rosenthal Memorial Award nominees, class of 2011. They are:

MIKE BELOTE
ROBERT DEFILIPPIS
STEVE JANNEY
JOHN PEREZ
BRETT PETERS

I urge you to attend the Conference this year in Reno, where you'll be able to learn more about these fine individuals. There will be some biographies in the Conference workbook, and at the Saturday luncheon I'll be making a special presentation (pssst, it will be different and a bit fun). At the banquet that same night, this year's recipient (if one) will be presented with the first CALSPro version of the award. Please come and be a part of history!



James A. Swickle

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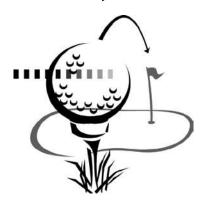
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Updates and Conference information will be available on the CALSPro website (above), so please make sure you visit the site often.

Thank you to all the CALSPro members who contribute their personal time, sponsorships and creative efforts to help make each Conference a success. Without your support, our members would not have the opportunities that they have today to operate and grow their businesses.

• Support Your Industry! • Stay Educated! • Have Fun! • See You in Reno! •

CONFERENCE SCHEDULE

FRIDAY, SEPTEMBER 23, 2011

8:00 Shotgun Start

15th Annual CALSPro Jack C. Janney Memorial Golf Tournament – Lakeridge Golf Course

4:00 pm - 5:00 pm Board of Directors Meeting

5:30 pm – 7:30 pm Registration Open/Exhibitor Set - up

7:00 pm – 10:00 pm

Welcome Event – Pinocchio's Restaurant
Shuttle transportation provided.

SATURDAY, SEPTEMBER 24, 2011

7:30 am – 5:00 pm Registration and Exhibits Open

7:30 am – 8:30 am Continental Breakfast

8:30 am - 10:00 am

Annual Business Meeting – Call to Order and Roll Call, President's Report, Secretary-Treasurer's Report, Legislative Update with *Mike Belote, Esq. California Advocates, Inc.* Nominations Open for the Board of Directors.

10:00 am – 10:20 am
Exhibitor Presentations

10:30 am - 11:15 am

CONTINUING EDUCATION SESSION:

"Insurance Policy Transportation and Risk Management Techniques for the Process Server" – Eric Vennes, Pacific Coast Insurance Group. This session is a must for business risk management.

11:30 am – 12:15 pm

CONTINUING EDUCATION SESSION:

"Serving Process at a Mailing Location" – Gretchen Lichtenberger, Process Server. Learn how to enforce the codes that assist our industry. Discover useful methods in obtaining a physical address for those who use a U.S. Post Box or private mailbox facility.

12:15 pm – 1:30 pm Networking Luncheon Buffet

1:45 pm - 2:45 pm

Annual Business Meeting continued

Nominations, Elections, Committee Reports & Bylaws Report Important, Proposed bylaw amendments were emailed 8/19/11.

3:00 pm - 5:00 pm KEYNOTE SESSION:

"Internet Profiling and Intelligence Gathering" – Michele Stuart, JAG Investigations. Ms. Stuart will illustrate the most current and comprehensive research techniques. This class is a thorough "how to" presentation showing us the step-by-step procedures in conducting due diligence research, Internet profiling and intelligence/counter-intelligence.

6:30 pm - 7:30 pm - Cocktail Reception

7:30 pm - 10:00 pm - Annual Awards and Installation Banquet

SUNDAY, SEPTEMBER 25, 2011

7:30 am – 11:15 am Registration and Exhibits Open

7:30 am – 8:30 am Continental Breakfast

8:30 am – 9:00 am CCPS Examination Review

9:00 am – 10:00 am CCPS Exam

10:00 am – 10:15 am Exhibit Break & Prize Drawings

10:15 am - 11:15 am

CONTINUING EDUCATION SESSION:

"Expand your Knowledge with Online Learning" Clifford Jacobs, CCPS, One Legal, LLC

11:15 am

CONFERENCE ADJOURNS - THANK YOU!

Visit www.calspro.org for more information.



43RD CONFERENCE

CALIFORNIA ASSOCIATION OF LEGAL SUPPORT PROFESSIONALS

Peppermill Resort & Casino, Reno, NV **September 23-25, 2011**

Company Name:		
Address:	City:	State: Zip:
Phone Number:	Fax: E-r	mail:
Attendee Name:	Attendee Name:	Attendee Name:
(Print the way you would like your name badge to read)	(Print the way you would like your name badge to read)	(Print the way you would like your name badge to read)
Full Registration – Member \$225 Late Registration \$275* "Member" includes all employees of a "Company" Member and Individual and Associate Members.	Full Registration – Member \$225 Late Registration \$275* "Member" includes all employees of a "Company" Member and Individual and Associate Members.	Full Registration – Member ☐ \$225 ☐ Late Registration \$275* "Member" includes all employees of a "Company" Member and Individual and Associate Members.
Full Registration – Non-member ☐ \$325 ☐ Late Registration \$375*	Full Registration – Non-member ☐ \$325 ☐ Late Registration \$375*	Full Registration – Non-member ☐ \$325 ☐ Late Registration \$375*
Non Member Guest All events \$175 Friday Evening Only \$55 Saturday Lunch Only \$55 Saturday Banquet Only \$65	Non Member Guest All events \$175 Friday Evening Only \$55 Saturday Lunch Only \$55 Saturday Banquet Only \$65	Non Member Guest All events \$175 Friday Evening Only \$55 Saturday Lunch Only \$55 Saturday Banquet Only \$65
Education Only ☐ \$150 ☐ Late Registration \$175*	Education Only ☐ \$150 ☐ Late Registration \$175*	Education Only ☐ \$150 ☐ Late Registration \$175*
Golf Tournament ☐ \$125	Golf Tournament ☐ \$125	Golf Tournament ☐ \$125
(CCPS) Exam ☐ Free (member) ☐ \$20 (non-member) ☐ \$25 (company-member)	(CCPS) Exam ☐ Free (member) ☐ \$20 (non-member) ☐ \$25 (company-member)	(CCPS) Exam ☐ Free (member) ☐ \$20 (non-member) ☐ \$25 (company-member)
Total: \$	Total: \$	Total: \$
	PAYMENT OF FEES:	
GRAND TOTAL: \$		
	Address:	
"Member" includes all employees of a "Company" Member and Individual and Associate Members. Full Registration – Non-member	"Member" includes all employees of a "Company" Member and Individual and Associate Members. Full Registration – Non-member \$325	"Member" includes all employees of a "Company" Member and Individu and Associate Members. Full Registration – Non-mem \$325

Please feel free to make copies of this form for additional registrations. Mail or fax completed form and payment to:

CALSPro • 2520 Venture Oaks Way, Suite 150 • Sacramento, CA 95833 • 916.239.4065 • 916.924.7323 – fax

Signature: _

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