

**Volume 7 / Issue 3 / Fall 2014**



LEGISLATION

**Legislation:**

Session Ends For Year



MEMBERSHIP

**Membership:**

Talk About the Evolution of an Industry



EDUCATION

**Education:**

The Opportunity Awaits



CONFERENCE

**Conference:**

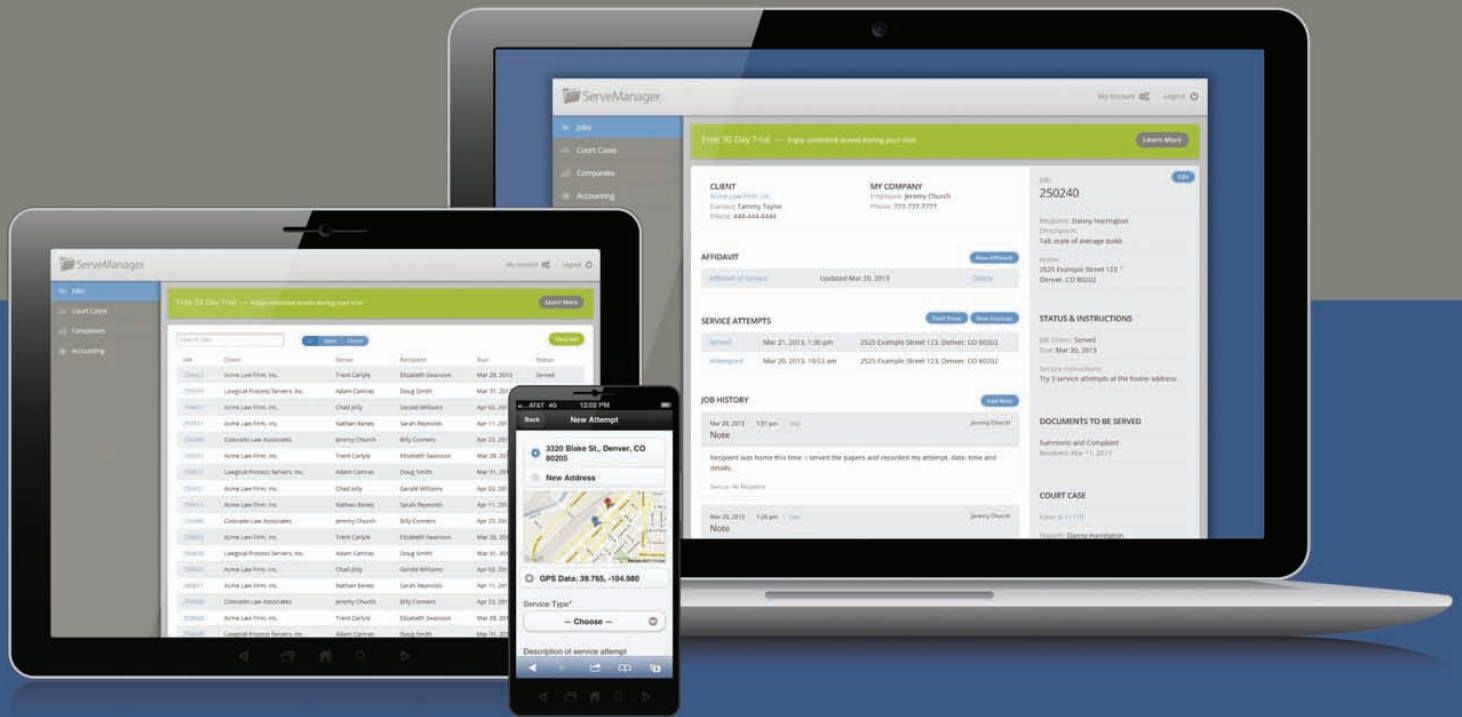
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# INSIDE THIS ISSUE

- 2 President's Message**
- 4 Capitol Report**
- 6 CALSPRO Conference**
- 13 Membership Application**
- 15 Bert Rosenthal Memorial Award**
- 20 Education**
- 21 CALSPRO's New Code of Ethics**
- 22 Membership Update**
- 24 CALSPRO Advertising Report**
- 24 Correction Notice**

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## Thank you to our Advertisers

- ServeNow – Inside Front Cover
- DGR Legal – 3
- Florida at your Fingertips – 5
- Seattle Legal – 14
- TRISTAR – 18
- 1-800-PROCESS – 23
- Washington Pre-Trial Services, Inc. – 25
- Borg Process Servers, Inc. – 25

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**California Association of  
Legal Support Professionals**  
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# PRESIDENT'S MESSAGE

MICHAEL KERN

2014 CALSPRO PRESIDENT

In the June, 2014 CALSPRO Press, I addressed our ongoing interaction with the Federal Trade Commission, and due to the hard work of the central office, CALSPRO is now in full compliance. I am also happy to report that in June our board of directors approved our Best Practices, Mission Statement and newly revised Code of Ethics. Our Education Committee continues to put forth an excellent CCPS program for CALSPRO members, and all CA process servers. The goal is to help raise the overall bar of process serving in California by educating our members and also nonmembers by providing the most relevant and current information on process serving rules, codes and best practices. Additionally, the Education Committee also furthers our goals of branding the CALSPRO name and increasing membership by actively promoting our association during the workshops, and providing membership material as well.

The eService committee is continuously working on CALSPRO's Position Statement regarding eService, which has been drafted but continues to be a work in progress. This will take some time to complete and the committee will forge ahead, not letting some bumps in the road along the way detour us from what we want to achieve for CALSPRO and its membership.

Our Investment Committee is evaluating all available opportunities to optimize a higher rate of return, and is currently setting up investments that will produce higher yields through Vanguard and other short and long term investments. We should expect

to begin to see better returns over the next few months.

Legislatively, the King's County Superior Court has recently published proposed local rules to mandate e-filing for all civil type cases. These newly proclaimed local rules will mandate e-filing effective October 1<sup>st</sup> through a single vendor, Tyler Technologies, thus not conforming to California rules of court. The court can mandate e-filing for complex, coordinated and certain group type of cases pursuant to CRC 3.403 but cannot mandate e-filing beyond that unless they comply with CRC 2.253(B). CALSPRO is objecting to the court's proposed rules, advising that in any county in California, unless the court is providing for electronic filing directly with that court (which Kings County Superior Court is not), then more than one vendor is needed to mandate e-filing. Objections have also been submitted to the Presiding Judge and the Executive Officer and Clerk of the Kings County Superior Court. Additional information has been posted on the CALSPRO website. Members were sent an e-mail on Aug 11<sup>th</sup> requesting that they do the same and send a letter with their objections regarding this e-filing mandate.

Our Membership Committee has engaged in an outreach program this year targeting professional photocopiers, individual and associate members of NAPPS, and former members of CALSPRO. The messages, being sent on a monthly basis via Constant Contact, highlight the benefits of membership in our association. We will continue reaching out to potential members while enhancing member benefits so as to have greater appeal to legal

support professionals throughout our state and across the country.

Our CALSPRO 46<sup>th</sup> Annual Conference will take place at the Bahia Resort in San Diego, CA October 17<sup>th</sup> - 19<sup>th</sup>. We start off with a BANG Friday, with a cruise on the Bahia Belle, a "Turn of the Century" Mississippi-style sternwheeler, followed by a beach party mixer including appetizers and drinks. Saturday looks to be a full day consisting of the general session, educational guest speakers, an update regarding e-filing and e-service, and culminating with a pre-banquet networking "attitude adjustment" and silent auction. The Banquet is always a big hit with the installation of the new Board and special award presentations, including the always poignant award presentation by our legislative advocate Mike Belote.

Sunday morning the activities start really early with the CCPS Exam, which is followed by round table discussion topics relevant to process service, collections, photocopy and legal support ancillary services. As the landscape of our profession changes, we will have to adapt right along with it. I encourage our members to join the conversation and help outline our future direction in the legal support profession, so please attend and participate in this year's conference. I look forward to seeing you in San Diego!

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# CAPITOL REPORT

MICHAEL D. BELOTE, ESQ.  
CALIFORNIA ADVOCATES, INC.

## SESSION ENDS FOR YEAR

California's legislature operates according to two-year sessions. Under the state constitution, the legislature must adjourn by midnight August 31 in even-numbered years. This year, August 31 fell in the middle of the Labor Day weekend. To the relief of all, the Senate and Assembly adjourned in the wee morning hours of Saturday, August 31, preserving much of the Labor Day weekend for friends and family.

Because 2014 was the second year of the 2013-2014 legislative session, the slate is wiped entirely clean going into next year. No bills carry over from this year to the next, and all bills not passed by the legislature would have to be reintroduced next year, when the 2015-2016 session commences.

2014 was a good year for CALSPro legislatively. No bills harmful to the members were enacted in this largely defensive year. CALSPro obtained key amendments in bills of interest. Credit goes to the hard work of Legislative Committee Chair Steve Janney and his committee.

A couple of items of interest:

- AB 2059 proposed modifications to Evidence Code Section 1158 relating to production and copying of medical records. The bill had obvious relevance to California attorney services and photocopiers. Sponsored by the statewide association representing the plaintiff's bar, the Consumer Attorneys of California, AB 2059 proposed explicit reference to

electronic records in the statute, and would have included caps on charges imposed by health care providers for those records.

CALSPro participated in a series of meetings with the sponsors and representatives of the "ROI" industry. Language had been floated which would have effectively created a monopoly for agents of doctors and hospitals, but this language was ultimately not amended into the bill. After a tortured process through the legislature, and opposition from health care providers, the sponsors of AB 2059 moved the bill to the inactive file late in the session, killing it for this year. But the issues are not going away.

- AB 2256 relates to sheriff's fees for service of process. The bill is sponsored by the Los Angeles County Sheriff's Office, which, through their very fine legislative representative Lieutenant Wayne Bilowit, was very forthcoming in dealing with CALSPro and other stakeholder groups on the language in the bill. CALSPro had issues with several proposals in the bill, which were deleted at our request. The final version of the bill makes minor changes to the gated community language contained in Code of Civil Procedure Section 415.21, and incrementally increases sheriff's fees for process serving throughout the Government Code. The bill was approved by the Legislature and is awaiting action by the Governor.

Under the state constitution, Governor Brown has until the end of September to sign or veto the hundreds of bills passed by the Legislature at the end of session. These will be fully covered at the CALSPro Conference in October, so members should definitely plan to attend.

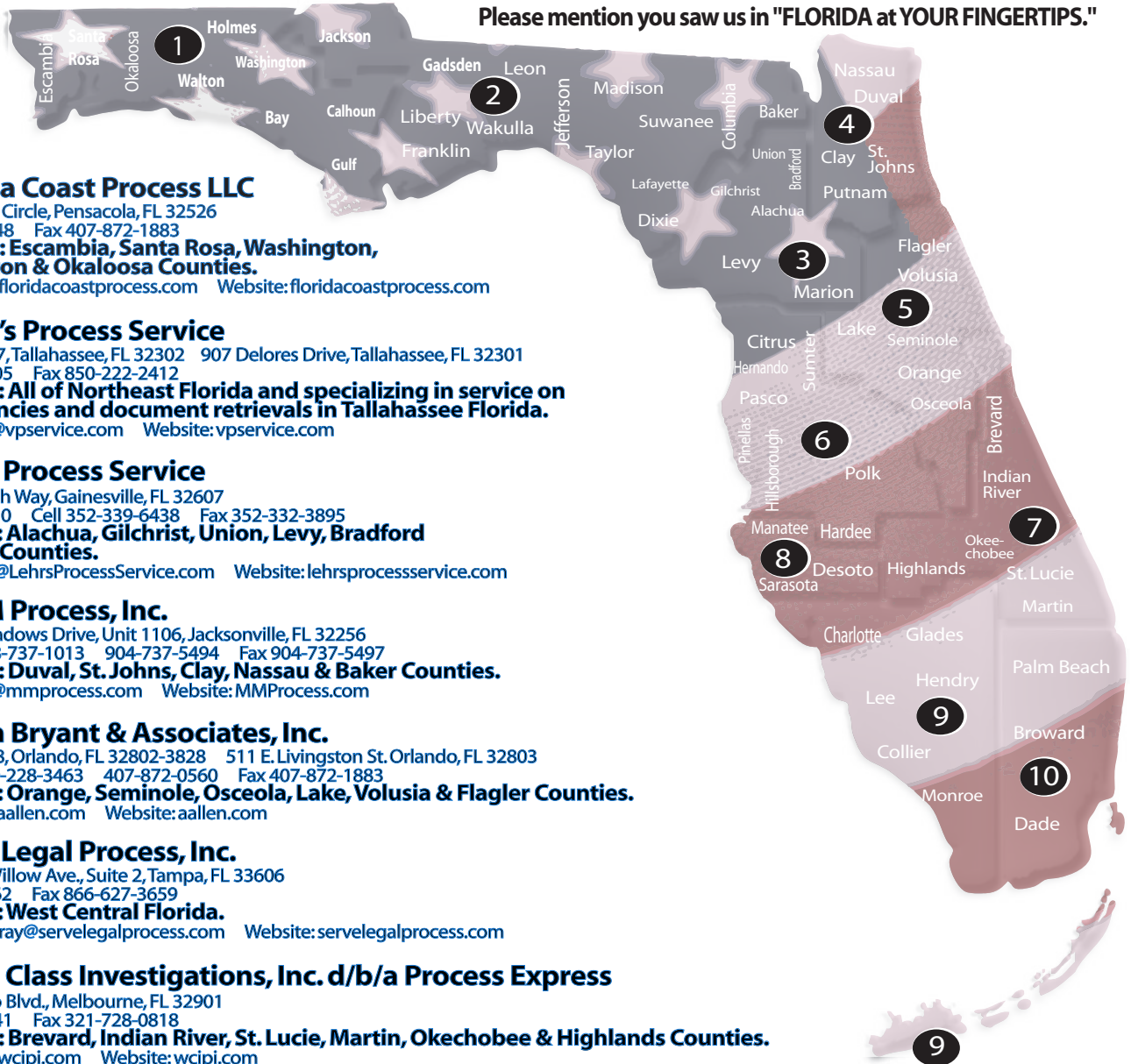
In December, the new legislature will be sworn into office, and in January, the process will begin anew. As predictably as death and taxes, another 2000-2500 bills will be introduced! 🐼



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# **CALSPRO**

**CALIFORNIA ASSOCIATION OF  
LEGAL SUPPORT PROFESSIONALS**

## **46<sup>TH</sup> CONFERENCE**

**Bahia Resort Hotel, San Diego  
— October 17-19, 2014 —**

**“Set Sail for Success”**





CONFERENCE

# "Set Sail for Success"

by Stephanie Saylor  
Conference Committee Chairperson

I tried to keep this brief, but found it too difficult because of all the news that I need to share with you about our Annual Conference in San Diego – October 17 – 19th. Here is a "brief" synopsis of what will be offered for you to enjoy:

- **The 18th Annual CALSPRO Jack C. Janney Memorial Golf Tournament** is at the beautiful **Riverwalk Golf Course**. We are fortunate enough to have Steve Wierzbinski chair this event ; and if you are unfamiliar with his skill level at the game, be ready to be impressed. He keeps the game fun for all and provides pressure for those seeking a challenge.
- **The Bahia Belle Sternwheeler Welcome Reception** will provide a hosted bar while cruising around Mission Bay. This cruise will be followed by a light buffet dinner on the beach at the hotel. This casual affair is a great time to don your Hawaiian shirt, enjoy the venue, and catch up with comrades.
- **The Annual Business Meeting** is always informative and should not be missed. The legislative updates provided by Mike Belote and the Legislative Chair will help you stay in tune with matters that will affect your business. This event also provides voting members an opportunity to exercise their rights in choosing leadership and the agenda of CALSPRO. Please participate; consider running for office and/or joining a committee.
- **The Continuing Education Sessions**
  - Jonathan P. Tomes, J.D. is an expert in HIPAA, HITECH and Privacy Rules

that affect the transmission of information. Are you in violation of security and privacy rules when you do a substituted service of legal documents that may include protected health information records? Whose responsibility is it to tell you that the papers include protected information? Are encrypted electronic transmissions enough, or is there more? What agreements must be in place between your company and the companies you use to perform your work beyond your borders?

- Derek Nussbaum of Paychex, Inc. will share his knowledge of health care reform, employer/employee compliance, benefits of retirement plans, and other employment related issues facing business. Are you in compliance with insurance changes for your size? Do you need to implement new company policies to protect your current practices?
- eService/eFile Update will be facilitated by Michael Kern of Kern Legal Services, Inc. and Ron Beach of ISD Corporation. This forum will allow members to interject what they have experienced with their local courts. This discussion will provide information on access in various counties, including counties using the Odyssey System (Tyler Technologies), and various hybrid arrangements. Attend and learn how you may continue to provide services to your clients in this new environment.

- **CALSPRO History Project – New this year!** Jerry Topolos, our History Chairman, will facilitate this audio/visual project to capture and preserve the memories of our members. It is open to all members –because we all keep our association strong, active and purposeful. Think StoryCorp by National Public Radio – short stories involving CALSPRO and its members that we never want to lose.
- **Interactive Roundtable Sessions** open Sunday morning and cover such topics as Process Serving, Photocopy, Collections and Ancillary Services. Let the ideas and knowledge of others help you expand your business. We are not stagnant; we are forever improving.
- **Exhibitor Presentations & Booths** will offer you the latest services and products to help you build your business, stay connected and provide answers to your questions.
- **CCPS Review & Exam** is offered at Conference so that you do not have to travel elsewhere!

All of this and more .... Cocktail Reception, Annual Awards Banquet, Silent Auction ....Come and enjoy!



# CALSPRO

CALIFORNIA ASSOCIATION OF  
LEGAL SUPPORT PROFESSIONALS

# 46<sup>TH</sup> CONFERENCE

**Bahia Resort Hotel, San Diego**  
**— October 17-19, 2014 —**

## Bahia Resort Hotel San Diego

998 W. Mission Bay Drive, San Diego, CA 92109  
800.576.4229 • 858.488.0551 • [www.bahiahotel.com](http://www.bahiahotel.com)

**Room Rate:** \$139.00 for Standard Garden View Room. Cut-off Date: **Tuesday, September 16, 2014.** Please contact the hotel directly and ask for the CALSPRO rate.

With Mission Bay surrounding the resort and Mission Beach only a block away, The Bahia offers endless popular San Diego activities. The Resort Water Sports outlet offers sailboats, kayaks, and paddleboards for use in Mission Bay. Bicycles and segways are also available to cruise up and down the boardwalks of Mission Bay, Mission Beach, and Pacific Beach.

**Conference Details:** All registrations must be returned with payment and postmarked by September 26, 2014 to avoid higher registration fees.

**Cancellation Policy:** Cancellations must be made in writing and received by September 26, 2014. Cancellations will be subject to a fee of \$25<sup>00</sup> per person. No refunds will be allowed for cancellations received after September 26<sup>th</sup>.



### ONLINE:

[www.calspro.org](http://www.calspro.org)



### VIA FAX:

(916) 924-7323



### VIA MAIL:

2520 Venture Oaks Way, Suite 150  
Sacramento, CA 95833

## California Association of Legal Support Professionals

2520 Venture Oaks Way, Suite 150  
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(916) 239-4065 - phone • (916) 924-7323 - fax  
[www.calspro.org](http://www.calspro.org) • [info@calspro.org](mailto:info@calspro.org)



## Local Attractions

A San Diego vacation offers endless ways to enjoy yourself including world famous attractions, 70 miles of beach and more ways than ever to save on your family vacation. For those looking to discover some of San Diego's history, visit Old Town, Cabrillo National Monument, Gaslamp Quarter, Balboa Park or one of the region's many missions. San Diego vacations means activities for every interest in your family.

The kids will enjoy a roller coaster ride, numerous entertainment centers or a day at a water park. The adventurer in your life will love sky sailing or a bi-plane ride. For those with more refined tastes, discover lush botanical gardens and beautiful wineries.

So prepare your pleasure principle for a meeting with gluttonous fun. Laugh your way through theme parks like SeaWorld, the world famous San Diego Zoo and Safari Park. Dance a path through the arts and culture scene, or take a swing at stress on one of over 90 golf courses. San Diego is perhaps the only place where entertainment can be found doing everything or nothing at all.

## Vacation Planning Guide

[http://sandiegomagazine.com/digitaleditions/SDTA\\_Summer\\_2014/](http://sandiegomagazine.com/digitaleditions/SDTA_Summer_2014/)

## Dining and Nightlife:

<http://www.sandiego.org/what-to-do/dining-nightlife.aspx>



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## 18<sup>TH</sup> ANNUAL CALSPRO JACK C. JANNEY MEMORIAL GOLF TOURNAMENT

**Friday, October 17, 2014**

**7:30 am Check-In • 8:00 am Tee-Off**

### ***Riverwalk Golf Course***

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[www.riverwalkgc.com](http://www.riverwalkgc.com) • 619.296.4653

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fees, cart, and box lunch.**

**Registration cutoff October 1st.**

**Register Now.**



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## ANNUAL BUSINESS MEETING

The Annual Business Meeting will be held on Saturday, October 18 from 8:30 am – 10:30 am and from 2:15 pm – 3:15 pm. During these sessions, important topics will be discussed, including: a Legislative Update; Committee Reports; Bylaw Amendments, Nominations and Elections for the Officers and Board of Directors; and General Member Comments/Suggestions. The Annual Business Meeting is an important component of the conference and provides members with the opportunity to participate and get involved in industry and association activity.

### VOTING

Please be reminded that only current “Individual” Members are allowed to vote or hold elected office, no other category of membership has a right to vote or hold elected office.

If you are currently not an Individual Member, please be sure to take a minute to join right away. As a member of the association, it is important that you make your vote count and also consider running for the Board of Directors and be an active participant. Important – no person shall be eligible for election as an officer or to the Board unless he/she has been a member for one year or was admitted at the last Annual Conference.

An Individual Membership application is contained in this registration brochure – please complete it and send it in with your conference registration.

## PERUSE THE SILENT AUCTION ITEMS AND BE A LUCKY BIDDER!

**Winners will be announced at the  
Saturday Night Banquet**

## INTERESTED IN BECOMING A CCPS (CALSPRO CERTIFIED PROCESS SERVER)?

... or just need to renew your certification or fine  
tune your serving skills?

**Be sure to sign up for the exam on Sunday,  
October 19th .**



**CALSPRO**CALIFORNIA ASSOCIATION OF  
LEGAL SUPPORT PROFESSIONALS**46<sup>TH</sup> CONFERENCE****Bahia Resort Hotel, San Diego  
— October 17-19, 2014 —****SPONSORSHIP OPPORTUNITIES****We have MANY sponsorship opportunities at the upcoming CALSPRO Conference. Check it out!**Please mark the appropriate category you have chosen and return this document along with payment to CALSPRO, 2520 Venture Oaks Way Suite 150, Sacramento, CA 95833 • 916.239.4065 • 916.924.7323/fax • [www.calspro.org](http://www.calspro.org) • [info@calspro.org](mailto:info@calspro.org)☐ I will donate \$ \_\_\_\_\_☐ I will be a **Pearl Sponsor – \$250**Includes: listing in Conference on-site program, verbal acknowledgement at luncheon, logo display inside a future issue of the *CALSPRO Press*.☐ I will be a **Ruby Sponsor – \$500**Includes: logo printed on Conference signage, listing with logo in Conference on-site program, verbal acknowledgement at luncheon, logo display inside a future issue of the *CALSPRO Press*.☐ I will be a **Diamond Sponsor – \$1,000**Includes: one exhibit table, logo printed on Conference signage, listing with logo in Conference on-site program, verbal acknowledgement at luncheon and installation banquet, logo display inside a future issue of the *CALSPRO Press*, 2 complimentary tickets to luncheon and banquet.**EVENT SPONSORSHIP:**Please check ☒ your preference(s):☐ **Silent Auction Item - Please list Item:** \_\_\_\_\_☐ **Silent Auction Donation - Please list amount:** \$ \_\_\_\_\_☐ **Education Session Sponsorship – \$500 (3 available)**☐ **Saturday Morning Continental Breakfast – \$350 (3 available)**☐ **Saturday Night Cocktail Party (Drinks) – \$500 (2 available)**☐ **Saturday Night Cocktail Party (Appetizers) – \$500 (2 available)**☐ **Sunday Morning Continental Breakfast – \$350 (3 available)**☐ **Tee Hole Sponsor at Golf Tournament – \$75**☐ **Refreshment Break – \$250 (3 available)****Yes, sign me up to sponsor!****Total amount of sponsorship: \$** \_\_\_\_\_**Company:** \_\_\_\_\_**Contact Person:** \_\_\_\_\_ **E-Mail:** \_\_\_\_\_**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_**Address:** \_\_\_\_\_**City, State, Zip:** \_\_\_\_\_So that your company name can be included in the necessary conference materials, the deadline for sponsorship submission is September 19, 2014. After this date, sponsorship opportunities may still be available, however, your company name may not be listed in come conference materials. Company logos should be e-mailed to: [stephanie@camgmt.com](mailto:stephanie@camgmt.com).**Checks made payable to CALSPRO** (address above) or you may fill out the credit card form to the right and fax it to: 916.924.7323.

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Signature of Card Holder \_\_\_\_\_

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! • Meet New People! • Have Fun! • See You in San Diego! •**



**CALSPRO**

CALIFORNIA ASSOCIATION OF  
LEGAL SUPPORT PROFESSIONALS

# 46<sup>TH</sup> CONFERENCE

**Bahia Resort Hotel, San Diego  
— October 17-19, 2014 —**

## CONFERENCE SCHEDULE

### FRIDAY, OCTOBER 17, 2014

**8:00 am**

**18th Annual CALSPRO Jack C. Janney Memorial Golf  
Tournament – Riverwalk Golf Course, San Diego**

**4:00 pm – 5:30 pm**

**Board of Directors Meeting**

**5:30 pm – 7:30 pm**

**Registration Open**

**6:30 pm – 9:00 pm**

Join your fellow attendees aboard the Bahia Belle Sternwheeler from 6:30 p.m. – 7:30 p.m. for a cruise around Mission Bay. The Bahia Belle will depart from the Bahia Hotel promptly at 6:30 p.m.; please check in at registration prior to boarding – name badges are required for admittance. Following the bay cruise, attendees will return to the Bahia Hotel at 7:30 p.m. for a light buffet dinner, fun and camaraderie on the beach. This is a casual affair; flip flops and Hawaiian shirts encouraged!

### SATURDAY, OCTOBER 18, 2014

**6:30 am – 7:30 am**

**Exhibitor Set-up**

**7:30 am – 5:00 pm**

**Registration and Exhibits Open**

**7:30 am – 8:30 am**

**Continental Breakfast in Exhibit Area**

**8:30 am – 10:30 am**

**Annual Business Meeting** – Call to Order and Roll Call, President's Report, Secretary-Treasurer's Report, and Legislative Update with *Mike Belote, Esq. California Advocates, Inc.* Nominations Open for the Board of Directors. This meeting will also include an Antitrust Presentation by Antitrust Officer, Mike Belote, which shall summarize CALSPRO's obligations under the FTC Order and shall also address compliance with the Antitrust Laws.

**10:30 am – 11:00 am**

**Exhibitor Break and Exhibitor Presentations**

**11:00 am – 12:30 pm**

**1) CONTINUING EDUCATION SESSION:**

**HIPAA - HITECH - Privacy Rules** – *Jonathan P. Tomes*  
*Veterans Press/EMR Legal*

**12:30 pm – 1:30 pm**

**Networking Luncheon Buffet and Bert Rosenthal  
Memorial Award Presentation**

**1:30 pm – 2:30 pm**

**2) CONTINUING EDUCATION SESSION:**

**Insurance/Employee Issues**– *Derek Nussbaum, Paychex*

**2:30 pm – 2:45 pm Break**

**2:45 pm – 3:45 pm**

**Annual Business Meeting continued**

Nominations, Elections, Committee Reports & Bylaws Report

**3:45 pm – 4:00 pm Exhibitor Break**

**4:00 pm – 5:00 pm**

**eService/eFile Panel** – *Ron Beach & Michael Kern*

This panel will update us on changes since last year's conference, to include ISD, Tyler Technologies, and the progression of electronic service of process in California and across the nation.

**5:00 pm – 6:30 pm**

**CALSPRO HISTORY PROJECT**

This open time slot is available to members to share their story regarding their involvement with CALSPRO, its members, and/or the industry. Each participant will be allowed up to five minutes of recording time. These recordings will be used to support the association's historical preservation project; your time and participation are greatly appreciated.

**6:30 pm – 7:30 pm**

**Cocktail Reception and Silent Auction**

**7:30 pm – 9:30 pm**

**Annual Awards and Installation Banquet  
and Silent Auction**

### SUNDAY, OCTOBER 19, 2014

**7:30 am – 11:00 am**

**Registration and Exhibits Open**

**7:30 am – 9:00 am**

**Continental Breakfast**

**7:45 am**

**CCPS Examination Review**

**8:00 am**

**CCPS Examination**

**9:00 am – 11:00 am**

**Interactive Roundtable Sessions**

Photocopy • Process Serving • Collections • Ancillary Services • The roundtable sessions will provide an opportunity for attendees to hear about the latest industry trends, share ideas and discuss practice areas with one another.

**11:00 am**

**CONFERENCE ADJOURNS -  
THANK YOU FOR ATTENDING**

**CALSPRO**CALIFORNIA ASSOCIATION OF  
LEGAL SUPPORT PROFESSIONALS**46<sup>TH</sup> CONFERENCE****Bahia Resort Hotel, San Diego  
— October 17-19, 2014 —**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Attendee Name:**

(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 includes all  
conference events.****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
- ☐ Saturday Banquet Child's Plate \$15

**Golf Tournament**☐ \$125**(CCPS) Exam**

- ☐ \$10 ( Individual members)
- ☐ \$15 (Company members)
- ☐ \$30 (non-members)

**Total: \$** \_\_\_\_\_**Attendee Name:**

(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 includes all  
conference events.****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
- ☐ Saturday Banquet Child's Plate \$15

**Golf Tournament**☐ \$125**(CCPS) Exam**

- ☐ \$10 ( Individual members)
- ☐ \$15 (Company members)
- ☐ \$30 (non-members)

**Total: \$** \_\_\_\_\_**Attendee Name:**

(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 includes all  
conference events.****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
- ☐ Saturday Banquet Child's Plate \$15

**Golf Tournament**☐ \$125**(CCPS) Exam**

- ☐ \$10 ( Individual members)
- ☐ \$15 (Company members)
- ☐ \$30 (non-members)

**Total: \$** \_\_\_\_\_\* Registration must be postmarked by September 26<sup>th</sup> to avoid additional fees.**PAYMENT OF FEES:****GRAND TOTAL: \$** \_\_\_\_\_☐ Check (payable to **CALSPRO**) ☐ AmEx ☐ Visa ☐ MasterCard

Cardholder Name: \_\_\_\_\_ Address: \_\_\_\_\_

Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ 3-4 Digit Security Code: \_\_\_\_\_

Signature: \_\_\_\_\_

Please feel free to make copies of this form for additional registrations.

**ONLINE:**  
[www.calspro.org](http://www.calspro.org)**VIA FAX:**  
(916) 924-7323**VIA MAIL:**  
2520 Venture Oaks Way, Suite 150  
Sacramento, CA 95833



**CALSPRO**CALIFORNIA ASSOCIATION OF  
LEGAL SUPPORT PROFESSIONALS**INDIVIDUAL  
MEMBERSHIP APPLICATION\******\*Only Individual Members are allowed to vote and hold office.******If you are not an Individual Member, join today and be eligible to vote and hold office.***

Last Name: \_\_\_\_\_

**Individual Members** shall be an individual engaged in the process serving, court filing, photocopy, or attorney service business. Individual members shall be qualified to be a Registered Process Server or Photocopier under the provisions of the Business and Professions Code of the State of California. Individual members will not be allowed to advertise a company name of any kind unless the Individual membership is attached to a Company membership. Individuals shall be entitled to a listing in the association Membership Directory under the Individual member section which will list their name, address, telephone, fax and e-mail only. This member shall have the right to vote, hold office, elected or appointed, and chair any committee. Individual membership in this Association is not transferable. Please see complete Terms and Conditions of Membership on the Web site, at [www.calspro.org/docs/\\_MemberApp.pdf](http://www.calspro.org/docs/_MemberApp.pdf).

**Please check if applicable:**
☐ **Process Server**    Registration #: \_\_\_\_\_    County: \_\_\_\_\_    Exp.: \_\_\_\_\_

☐ **Photocopier**    Registration #: \_\_\_\_\_    County: \_\_\_\_\_    Exp.: \_\_\_\_\_

**Individual Members are:** Allowed to Vote • Allowed to Hold Office • Entitled to Privileges (Newsletter, Directory) • Eligible to Attend Events as a Member • Eligible to Serve on a Committee • Eligible to Serve as a Committee Chair • Receive Roster Listing

**For Individual Membership, the following information will be listed in the Membership Directories:**

Individual Name: \_\_\_\_\_ County: \_\_\_\_\_

Street Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Other Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Attach to a Company Listing? ☐ Yes ☐ No

(If Yes, provide Company Name and City): \_\_\_\_\_

\_\_\_\_\_

**PAYMENT INFORMATION**

Membership dues are due annually on January 1. Pro-ration of membership dues is available in the *second* year of membership; please contact the office for further details.

**TOTAL CHARGE – Individual Member: \$200.00**☐ Check Enclosed, payable to CALSPRO, in the Amount of the Total Check Line☐ Credit Card Charge in the Amount of the Total Charge Line☐ VISA☐ MASTERCARD☐ AMEX

Account #: \_\_\_\_\_ Exp.: \_\_\_\_\_

Credit Card Verification Code: \_\_\_\_\_ Billing Zip Code: \_\_\_\_\_

Print Name on Card: \_\_\_\_\_

Signature: \_\_\_\_\_

☐ I agree to the CALSPRO Terms and Conditions \_\_\_\_\_



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4201 Aurora Avenue N #200, Seattle, WA 98103  
206 443 0885 - 206 728 2833 (fax)  
SeattleLegalMessengers.com

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## Olympia/Tumwater Registered Agent Process Service Rates



**\$85**



Next Day Service To The Following

CT Corporation  
National Registered Agents  
Corporation Service Company  
Business Filings Inc.  
Prentice Hall  
Unisearch, Inc.

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*Serving all of Washington State*

# California Association of Legal Support Professionals

## Bert Rosenthal Memorial Award



**E**ach year the Bert Rosenthal Committee meets and makes nominations for recipients of the Bert Rosenthal Memorial Award. This prestigious award is presented to an individual who, through the years, has given the utmost of service and dedication in promoting our industry.

This award is named after Bert Rosenthal, who was a founding member of the association and one of the most respected. He had a great sense of humor, and played an integral and fun part in our association. He was always ready to help anyone who asked or needed help. He exemplified everything this award stands for.

The committee consists of the CALSPro President, all past presidents who are still members of the association, and past recipients of the award. Should there be a recipient chosen, the name will be announced at the CALSPro Conference in October.

### Past Rosenthal Recipients

1978	Bert Rosenthal ( <i>In Memoriam</i> )
1979	Michael Buter
1980	Andrew R. Estin
1981	Richard J. Green
1982	<i>Not Awarded</i>
1983	Carl Strang
1984	Hugh Hallenberg
1985	Connie R. Melvin
1986	Jaunita Tanzer
1987	<i>Not Awarded</i>

1988	<i>Not Awarded</i>
1989	Elaine J. Erdman
1990	Thomas J. Bowman, Jr.
1991	Michael O. Price
1992	Joseph H. Karotkin
1993	<i>Not Awarded</i>
1994	Frederic A. Blum
1995	Tony Klein
1996	<i>Not Awarded</i>
1997	Paul R. Anderson
1998	Robert A. Cook
1999	Jeffery H. Karotkin
2000	Edward R. Wasserman
2001	Robert D. Alkema
2002	Al Crowe
2003	David S. Nill
2004	Mark L. Schwartz
2005	Ronald Ezell
2006	Paul Tamaroff
2007	Jerry Topolos
2008	Jack Janney ( <i>posthumous</i> )
2009	Herbert E. Hoffman
2010	<i>Not Awarded</i>
2011	Steven Janney
2012	Mike Belote
2013	Brett Peters

### The Nominees for 2014 Are:

**Chad Barger**  
**Jennifer Blevins**  
**Wendy Bowman**  
**Cliff Jacobs**  
**Michael Kern**  
**John Perez**

### Chad Barger

Chad was born in the Central Valley of California and raised on a fine mix of God, patriotism and country music. Shortly after high school, Chad took a job with a private investigator friend at a local law firm. For two years Chad learned the ropes of private investigations, process serving and the court system, while attending Bakersfield College and studying Criminal Justice. Shortly after college in 1992, Chad accepted a job with a local attorney service as their branch manager. After bringing that company to new heights, Chad realized he had a knack for the legal support profession and opened Attorney's Certified Service in Bakersfield with his grandfather Charles in 1994. A year after opening his business, Chad was struggling to make ends meet. Friends told him that the Kern County Sheriff's Department was hiring, so he threw his hat in the ring and applied. In 1995, Chad was hired by the department and worked in a variety of assignments including the county jail, local patrol, Sheriff's Emergency Response Team

*Continued on page 16*



(SERT) and lastly at the Sheriff's Academy teaching restraint techniques, cell extraction and stun gun procedures.

Chad became a member of CAPPS/CALSPPro in 1994. He has served on the Board of Directors since 2007, and has served as a two term President, Vice President, Continuing Education Vice Chair and Area Governor. He is currently serving as Chair of the Website Committee and sits on the Legislative and Conference committees. Chad credits his success to the people he surrounds himself with. Likeminded, goal oriented individuals that challenge the status quo and aren't afraid to speak what's on their mind.

Chad had great success as President with his ability to relate to members and inspire them to help push the association forward. He cherishes the relationships he made and the new business opportunities his involvement in CALSPPro has brought him.

Even with an extremely busy life, Chad has always put God and his family first. His wife Belinda and three children, Caleb, Jacob and Hannah are his real treasures. He enjoys spending time anywhere with his family, but especially at their family cabin at Bass Lake or at the family condo in Avila Beach. He also enjoys hunting and fishing but especially enjoys fly fishing with close friends in very remote places of California, Alaska and Montana.

When asked if this is the way he planned his life to turn out, he laughed and told a joke. "If you want to make God laugh, tell him your plans".

### Jennifer Blevins

For the past 25 years, Jennifer Blevins, aka "Jenny," has served as the CALSPPro Administrator, since the time when the association, then known as CAPPS, switched from a single-person Administrator to an association management company in 1989.

CALSPPro is managed by California Advocates Management Services (CAMS), which is a division of California Advocates, Inc. Ms. Blevins joined CAMS in 1994, and oversees the functions and staff of the management services division. Jenny

became a Shareholder in the firm in 2006, and currently serves as the Secretary of the firm.

With over thirty years of experience in multi-association management, Ms. Blevins has managed numerous associations, including trade associations, professional organizations, and specialty medical societies. She has served in various capacities from meeting planning to executive leadership. Ms. Blevins earned her Certified Meeting Professional designation in 1998 and maintains membership in Meeting Professionals International. Additionally, Ms. Blevins is a member of the American Society of Association Executives and the California Society of Association Executives, in which she was recently nominated by her peers for the Association Executive of the Year Award.

With respect to CALSPPro, Jenny was very honored when she changed firms in 1994 from another management company and CALSPPro made the decision to move with her. One of the most important accomplishments during Ms. Blevins' tenure as the association's Administrator, was facilitating the January, 2007 Strategic Planning Meeting which resulted in the association name and infrastructure change from CAPPS to CALSPPro.

Additionally, Jenny's role as the CALSPPro Administrator includes oversight of the day-to-day operations of the CALSPPro Central Office. Ms. Blevins works closely with the association leaders and her staff to insure that the needs of the members are being met. Ms. Blevins has played an instrumental role in CALSPPro in board and committee development, executive leadership, member communications, budget oversight, and conference planning. Ms. Blevins stresses the importance of being aware that the association belongs to the members and not to her or the management company. The role of the management company is to work hard for the association and continue to manage and lead the association in a successful, forward direction.

A very pivotal and special moment occurred in Jenny's career when she was awarded the CALSPPro President's Award in 2010 by Steve Janney. Ms. Blevins was also nominated for

## CALSPPro COMMITTEES

### ADVERTISING

Robert Porambo – Chairman  
213/483-4900  
[rporambo@knoxservices.com](mailto:rporambo@knoxservices.com)

### ASSAULT ADVISOR

Mike Hylan  
530/272-5463  
[process@alsolegalsupport.com](mailto:process@alsolegalsupport.com)

### CONFERENCE

Stephanie Saylor – Chairperson  
831/384-4030  
[Stephanie@SaylorLegal.com](mailto:Stephanie@SaylorLegal.com)

### DISPUTE RESOLUTION

Jeremiah Jones – Chairman  
877/353-8281  
[jeremiah@boscolegal.org](mailto:jeremiah@boscolegal.org)

### EDUCATION

Cliff Jacobs – Chairman  
415/475-6213  
[cjacobs@onelegal.com](mailto:cjacobs@onelegal.com)

### eSERVICE

Mark Schwartz  
415/491-0606  
[mschwartz@onelegal.com](mailto:mschwartz@onelegal.com)

### FORMS

Tony Klein – Chairman  
415/495-4221  
[tony@attorneyserviceofsf.com](mailto:tony@attorneyserviceofsf.com)

### LEGISLATIVE

Steve Janney – Chairman  
213/628-6338  
[steve@janneyandjanney.com](mailto:steve@janneyandjanney.com)

### MEMBERSHIP

Larry Kirlin – Chairman  
559/233-1993  
[lkirlin@firstlegalsupport.com](mailto:lkirlin@firstlegalsupport.com)

### NEWSLETTER

Pat Woodman – Chairman  
888/722-6878  
[pat@prolegalnetwork.com](mailto:pat@prolegalnetwork.com)

### TECHNOLOGY

Ken Hastings – Chairman  
951/296-2669  
[service@hastingspps.com](mailto:service@hastingspps.com)

### WEBSITE

Chad Barger – Chairman  
800/366-5445  
[cbarger@attorneyscertified.com](mailto:cbarger@attorneyscertified.com)

Continued on page 17

the association's most prestigious award, the Bert Rosenthal Memorial Award in 2011 and 2013.

Born in Bogota, Colombia, South America, Jenny enjoys yoga and being outdoors. Ms. Blevins recognizes the hard work and tireless efforts of association volunteers, and is grateful for the many friendships she has made within CALSPro.

### Wendy Bowman

Wendy knew from the time she was a teenager that she wanted to work in the legal field. Planning to attend law school and in need of a part-time job while in college, Wendy took a job working as an entry level clerk in a busy family law firm in San Jose. By the time Wendy graduated from San Jose State, her part-time typing job had evolved into a full-time legal assistant position, packed with client meetings, case research and pleading preparation. Early on, it was evident that a successful work day in family law required a great reliance on her office's attorney service, and that was the staff at T&B Legal Service. Daily court runs, status calls, rush services were a never ending part of the program. T&B's owner, Tom Bowman, a high school classmate of the attorney Wendy worked for, would often stop by to chat and after numerous offers for a lunch date, Wendy finally agreed. The rest is history as they say.

Wendy joined Tom at her first Board meeting in 1992 and can still recall how very impressed she was by the discussions and effort of the Board to do good work for the benefit of the membership. Wendy joined Sterling Madison in 1999, and following the example of giving to the industry she saw in Tom for years, Wendy joined the Board in 2004, where she has served consecutive terms since that time. Wendy has served on a number of committees and is completing her fourth term as Chairman of the Board. Wendy is convinced that, while it does take time and energy to be involved, the returns far outweigh the investment. The relationships, knowledge and perspective gained through leadership in CALSPro bring a benefit to her work every day. Wendy is honored to be a Rosenthal nominee and congratulates her fellow nominees. She takes to heart the reality that if we are successful contributors

it is in part because of our own efforts, but also very much due to those we work with.

Wendy has been married for 21 years and has two children, Will and Kate.

### Cliff Jacobs

Cliff Jacobs is in his 25th year as a legal support professional, although his CAPPs / CALSPro career began in 2004, when he first became Area Governor for Los Angeles County. Cliff's humble beginnings started at Pascack Hills High School in Northern New Jersey in the mid 70's. After high school he attended Rutgers University where he received his Bachelor of Science degree in Administration of Justice. He then went on to grad work at NYU in an experimental (emphasis on mental) special Intensive Study Paralegal Diploma Program, where he graduated third in his class. He moved from the East coast to California in the spring of 1988.

Cliff accepted a position in 1990 as a route person and court runner for Personal Attorney Service (PAS) in Van Nuys. In the mornings he ran a route, and in the afternoons he was a Bankruptcy Court runner. Thus began his trek upward from an entry level position. After three months, he was promoted to bankruptcy supervisor at PAS. In the late 1990s, Cliff injured his ankle and had to keep his foot elevated for six weeks, so management used him in the office to interact with clients and trouble-shoot assignments, tasks at which he excelled. When he could walk again he was promoted to Court Service Supervisor and was also assigned to the "Out of County" department as the assistant manager covering all 50 States.

In 2006, Cliff became an official member of CAPPs, and was asked to be the Area Governor Coordinator. At conference that year he received the "Rookie of the Year" award. In 2007 Cliff was elected to the board of directors for the very first time, and appointed as Area Governor Liaison. He also participated in the Strategic Planning Sessions, where CAPPs ultimately became CALSPro. He was re-elected the Board, and the following Spring, when the Chairman of the Continuing Education Committee had to bow out, Cliff stepped up and became

the acting Chairman. In 2009, his dedication to the association and commitment to the membership was recognized by his receiving the "Member of the Year" award for the first time. Once again re-elected to the Board, he was officially appointed as Chairman of Continuing Education.

Throughout his career Cliff has always taken the bull by the horns, engaging fully and reinventing himself often. He has done the same with the Continuing Education program, creating an innovative Workshop experience including providing folders containing newly revised Workbooks, Handouts, Study Guides, and a Code and Case Law reference manual; all of which coincide with a CCPS PowerPoint presentation. Different versions of the Exam are now used at each testing allowing participants to sit in close quarters during the exam. The program continues to evolve, ensuring an ever increasing body of well trained and knowledgeable Certified Process Servers well into the future.

Since 2007 Cliff has served on practically every CALSPro committee, many several times. He is currently in his third term as Vice-President, and in his seventh year as Continuing Education Chairman. Cliff has dedicated himself to being of service to the members of CALSPro and takes great pride in always bringing his best efforts forth, while at the same time keeping the best interest of the association and its members first and foremost. As testament to this, Cliff was honored by becoming CALSPro's 2012 Member of the Year. He continues to work hard for the association, membership, our profession and everything he endeavors through strong dedication, commitment and resourcefulness.

### Michael Kern

Michael was born into an Attorney Service family in the San Fernando Valley in 1969 and lived nearby in Sepulveda until he was 9, at which time his family moved to neighboring Santa Clarita Valley. His father, Dave Kern, started an Attorney Service in 1961. Whenever Michael was on school breaks he would help the family business by setting up filings and file at the courthouse,

*Continued on page 18*

calling runners for status, and riding with route drivers doing pick-ups. When he was old enough, he rode along with his dad to learn how to serve papers correctly.

Michael achieved success in school both academically and athletically, and graduated Hart High School in Newhall in 1987. He was then officially brought into the family business. Dave Kern's philosophy of not being the biggest, but being the best attorney service in California left Michael with a strong work ethic. He registered as a process server and served papers while attending College of the Canyons through 1989 where he majored in Business Marketing. Michael dedicated himself to learning every job possible in the family business; and over time, became very proficient. He attributes his success to his dedication to and passion for this profession.

In 1990 Michael met his future wife and business partner, Sheri, who joined the family business that same year. They married two years later (March 1992) and started a family shortly thereafter while continuing to work. They have three children who are their pride

and joy, David, Mikey, and Kayla. They are a close family and share many interest and hobbies with their children such as golf, bowling, camping, boating, motocross riding and NASCAR.

In 2005, Dave Kern Attorney Service changed its name to Kern Legal Services, Inc. in order to better represent that they provided services to the entire legal community, rather than just to attorneys. Michael is very proud to be a second generation legal support professional and is very excited that his son David followed in his footsteps by joining the family business in the fall of 2012 while also attending California State University. Like father, like son.


Michael has been a member of CALSPRO since 1994. He was part of the strategic planning sessions that shaped CALSPRO's direction as it evolved from being CAPPS. Over his twenty years in the association, he has served in many capacities such as Area Governor, Director, Advertising Chairman, Directory Chairman, Vendor Chairman, Secretary-Treasurer, Second Vice President,

First Vice President, Chairman of the Board, and as President.


In the late 1990's Michael spearheaded a Hawaiian Raffle campaign which brought in much needed funds to the association. He was also very instrumental in the development of our marketing and advertising plans, our website and the job post feature. His contributions have been recognized over the years with his receiving the Rookie of the Year, Presidential Recognition (Going the extra mile), Member of the Year (2003-04), and Member of the Year (2010-11) awards. Michael is very proud of our association and our profession, and continues to strive to be the very best at whatever he does.

*Continued on page 19*

# TRISTAR SOFTWARE




Oh! A new web order for a process job in Philadelphia!



COMMERCIAL PROCESS SERVING, INC.

Ok, order imported. Now...who do I have that covers that area?




COM PROCES

The Tristar "suggested server" function says I have three servers sorted by price and rating. Let's try...Dennis Richman!

One minute later...

Hey! A new order for process! Alright, just gotta check the details on WinServeMobile.




BURGER LAND

Alright! The job's only a couple of blocks away!

Submitting final status...photo...and GPS attached...servee description...and...SUBMIT!

I GOT SERVED AGAIN?!!



Nailed it! Thanks WinServeMobile!

**TRISTAR SOFTWARE**  
**WWW.TRISTARSOFTWARE.COM**  
**SALES@TRISTARSOFTWARE.COM**  
**805.227.1213**



### John Perez

John Perez has had a varied experience throughout his adult years. Born and raised in Newark, NJ, John became a Newark police officer at the age of 21. There, he worked in the patrol, detective, and administrative divisions experiencing a variety of pleasant, and often unpleasant, situations. During his tenure as a police officer, John received several awards, including the police department's highest award for restraint shown in a gunpoint standoff with a person who had just committed six armed robberies, and a homicide. The restraint was in risking his safety by not discharging his weapon in the presence of innocent bystanders who had witnessed the foot chase, and were in the line of fire. John's partner ultimately subdued the criminal without placing others in further danger. He, too, received the department's highest award.

While serving on the police department, John graduated from Fairleigh Dickinson University, and then went on to Seton Hall School of Law where he graduated with a Juris Doctor degree. He was admitted to the practice of law in 1974. All of this while married with three young children.

In 1990, at the behest of his younger son Michael, John became engaged in the process service profession by assisting him who had been presented with a business opportunity. Soon, the entire family was involved. John is the current owner of NJ Legal Process Service, LLC, Springfield, NJ, and Interstate Deposition Subpoena Service,

Inc., Newark, NJ. NJ Legal concentrates its efforts on service of process within New Jersey; Interstate Deposition assisting law firms and professional process servers in having out-of-state deposition subpoenas properly issued and served throughout the United States.

A member of the National Association of Professional Process Servers (NAPPS) since 1994, John has served as NAPPS President from 2005 through 2007, and as a member NAPPS Board of Directors for nine consecutive years. During that time, John served on various committees, most recently as Past Chair of the NAPPS State Associations Committee. During his participation on this committee, he was instrumental in assisting in the establishment and support of existing and new process server associations throughout the United States, with an emphasis in legislative/court rule initiatives, and professional process server education.

John is also a member of the New Jersey Professional Process Servers Association (NJPPSA) where he has served as past, and now current, President and past member of the Board of Directors. During his experience, John formulated the NJPPSA Certification and Continuing Education Program, and has conducted numerous seminars on How to Serve Civil Process in New Jersey. He is the current Chair of the NJPPSA Education Committee. Through his efforts, the New Jersey Private Process Server Registry was created. This Registry has received the endorsement of NJPPSA, and is supported by private process serving companies.

John is also a member of the New York State Professional Process Servers Association (NYSPPSA) where he encouraged the association to adopt the NYSPPSA Certification and Continuing Education Program, similar to that of New Jersey. As in his home state, John has participated in numerous process server education seminars. He is currently the past Co-Chair of the NYSPPSA Education Committee. In recognition of his efforts, NYSPPSA has granted John life time membership status in the association.

In, 2011, "In appreciation for the Uncompromising Dedicated Service, Exceptional Visionary Insight and Focused Unwavering Leadership for the betterment of the National Association of Professional Process Servers" John became the recipient of the NAPPS Donald "Mac" MacDonald Award.

In that same year, and now again in 2014, John Perez is a candidate for the prestigious CALSPro Bert Rosenthal Memorial Award.





## EDUCATION

### **CALSPRO Education – The Opportunity Awaits and It’s So Much More Than You Thought**

**— by Cliff Jacobs, Education Chair**

**C**ALSPRO is an ever evolving Association, and as such, it makes sense to periodically take stock of all of the educational resources available to you both as formal educational programs, and also as resources that broaden your specific knowledge of the codes and statutes as they too evolve. Additionally, the many facets of our association provide valuable and current information that enhances your general understanding of the Legal Support profession, not only in California, but nationally and even internationally.

The value of being a member of the association goes well beyond exchanging work, being listed in the directory and on the job quote feature, and just being more visible to receive work from every possible source. Membership allows you educationally to keep your finger on the pulse of both the industry and profession aspects of legal support.

On the industry side, we provide articles and blogs about new technologies that legal support companies are utilizing to work smarter and not harder such as web apps, software, search engines, etc. On the profession side we discuss evolving trends and practices, alert you to procedural shifts in how the courts and Sheriff’s departments are processing work, make you aware of precedent setting judicial findings, and give you early notice of pending changes in rules of court, state and federal codes, fees, tax rates etc. Sometimes we even ask you, our member, to actively voice your concerns by

sending letters in opposition to proposed changes that would negatively impact our profession.

Legislatively, CALSPRO has been the watchdog of our profession for the past 45 years. We have a strong history of fighting any and all adverse legislation threatening our profession, as well as putting forth legislation that benefits and protects legal support professionals. If you have not yet seen the body of work that CALSPRO has been involved with legislatively, perhaps you would like to educate yourself by going to our website and perusing our Legislative History, or simply click: CALSPRO Legislative History. Many of the advantages and benefits Registered Process Servers enjoy today came from proactive involvement of our association. For example, writs, pre judgment claims, or ORAPs/OEX’s, may be served by a Sheriff, or Registered Process Server, but cannot be served by a Private Investigator or his staff, or by a person who is not registered, regardless of how many serves they have done.

Our Education Committee is also an excellent resource. You can learn about upcoming workshops and certification exams use this online link, <http://calspro.org/events/education/> on our website or under the Education tab at top, or the Education Cornerstone (EDUCATION). You can also see who has earned their CCPS designation, find out your own CCPS expiration date, or search for a CCPS designated server as well (Certified servers) use this online link, <http://calspro.org/education/certified-servers/>.

And as a valuable added bonus, we have partnered with an Online Education provider and now offer over 2,000 very comprehensive yet inexpensive online educational courses and programs. The link to these programs can be found under “Online Programs” which is under the EDUCATION tab at the top of the website. Simply click the URL provided there, or use this online programs link, [www.myeglearn.com/CALSPRO/](http://www.myeglearn.com/CALSPRO/). These courses and programs cover a full array of topics including Desktop and Software Applications (like Microsoft Word, Excel, Outlook, etc.), Career and Personal Development, Customer Service & Telephone Skills, Management and Leadership Skills, Privacy and Security, Small Business Management and many, many more. As an owner or manager, these courses can help your business be even more successful, help develop employees, take managers to the next level, fulfill State compliance training requirements (e.g. Harassment Prevention training), and can even help family members, friends and their school aged children as well. Please use this online programs link, <http://www.myeglearn.com/CALSPRO/> or go through our website and check them out.

As we endeavor to keep stride with the very fast changing landscape of legal support, consider diving in and embracing the educational opportunities CALSPRO is providing. As Ben Franklin said, “An investment in knowledge pays the best interest.” 🐘

# CALSPRO Board of Directors Approves New Code of Ethics

At its June Meeting, the Board of Directors approved the following revised Code of Ethics:



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SACRAMENTO, CA 95833

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## CODE OF ETHICS - STANDARDS OF PROFESSIONAL CONDUCT

*Revision Approved by the Board of Directors on June 21, 2014*

Every member of this Association (formerly known as the California Association of Photocopiers and Process Servers) shall be familiar with and agrees to abide by the Code of Ethics of this Association.

### 1. PROFESSIONAL DUTY

Every member of this Association shall conduct themselves within the bounds of the law, and do not permit, much less demand, any violation of the law or any manner of fraud that will effect due process or the rights and confidences of a client. Members should at all times maintain a high standard of conduct personally and professionally avoiding even the perception of misconduct, and shall respect this Association and its membership.

A member's commitment or obligation to a client shall never supersede the due process rights of a person or entity being served with legal process. Every available precaution should be taken to eliminate unethical or improper action in the service of legal documents. The rights of the person or entity being served with legal process should be protected at all times.

### 2. ADVERTISING

The solicitation of business by false or misleading advertising is unprofessional and is prohibited by the professional standards and Code of Ethics of this Association.

### 3. FINANCIAL RESPONSIBILITY

All members are expected to pay bills to other members promptly. Late payments can cause financial hardship. No member shall be expected to handle any assignment for any other member whose account is delinquent. Failure to handle services for a delinquent member shall not constitute a ground for filing grievances. Failure to pay any bill promptly shall constitute a ground for grievance and can subject the member to disciplinary action in accordance with the Manual of Policies and Procedures.

### 4. PROOF OF SERVICE – OTHER RELATED FORMS

Proofs of service should only be executed after the registered process server has determined it accurately reflects his/her efforts and results. This would include any declaration of due diligence and declaration of mailing. It is unethical for a person other than the actual server to sign a process server's name to a proof of service, declaration or any other document under the penalty of perjury.

Notarization of any document shall be done in accordance with the laws of the State of California. Any effort or attempt to circumvent the notarization process is a violation of the Code of Ethics and state law, and as such, will be reported to the State authorities upon discovery.

Members are reminded that it is a criminal offense to induce (solicit, coerce, or influence) a notary to execute a false certificate or other writing.

Electronic signatures must be personally affixed, applied or signed to the proof of service or other documents only by the actual person executing the document. Electronic signatures must be only used in courts where law or court rules allow them.





## Ancillary Services

The corner convenience store. You drive by dozens of them a day and probably buy gas from one every week. Talk about the evolution of an industry. I read about a company that started as a coal hauler and followed the trend into the gasoline and service station business. Over time they added convenience stores and eventually fast food franchises. As one product started to decline it created pressure to grow another.

Can you imagine a company known for horse-drawn coal wagons making their biggest profits on pizza and sub sandwiches a few decades later? What will your business look like in 40 years? Maybe the more important question is, what will it look like when you are ready to retire?

What are the goals for your business? Grow it? Sell it? Let’s assume you want to sell or pass down your business at your retirement. The first thing you want to do is plan your trajectory. By that I mean, plan the path for the peak, not when you want it to end. Planning for your business to end at your retirement will assure a miserable end and a bargain basement sale price. Planning to sell your business at the peak will ensure a healthy, valuable asset.

One strategy to keep your business growing is to add ancillary services. Think about the variety of products and services offered by a modern gas station: Convenience Store, Car Wash, Lottery, ATM, Red Box, Propane, etc. The list goes on and on.

As the courts adopt e-filing it will cause pressure for you to add new services. What is your plan to replace your court filing revenue? Looking around our industry I’ve seen our colleagues offering the following:

- |  |                               |
|--|-------------------------------|
| <b>Archive Scanning</b>                        | <b>Messenger/Courier</b>      |
| <b>Bail Bonds</b>                              | <b>Notary</b>                 |
| <b>Collections/Judgment Recovery</b>           | <b>Software</b>               |
| <b>Copy/Print Services</b>                     | <b>Subpoena/Copy Services</b> |
| <b>Court Reporting</b>                         | <b>Transcription</b>          |
| <b>Digital Services (ESI, Forensics, etc.)</b> | <b>Translation</b>            |
| <b>Facilities Management</b>                   | <b>Trial Support</b>          |
| <b>Insurance Bill Review</b>                   | <b>UDA/LDA</b>                |
| <b>Investigations</b>                          | <b>Videography</b>            |
| <b>Medical Record Review</b>                   |                               |

Ancillary services is just one of the roundtable discussions being held at the CALSPRO Conference in San Diego this fall. A wise man once said, “fail to plan, plan to fail”. I suggest you plan to be at the conference!

# **FOR Sale:** **Zip Codes**

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### ***Interested?***

***Go To [1800PROCESS.com](http://1800PROCESS.com)  
Or Call Doug Kramer At  
1 800-687-0130 For More Information***

# CALSPPro Advertising Committee Report

by **Robert Porambo**

*Advertising Committee Chairman*

I would like to welcome our newest vendor member Paychex to CALSPPro. Derek Nussbaum is our contact and will be at conference in October to go over their wide range of services they offer. In addition to payroll services, they offer 401k services, Health Benefits, Workers Compensation Insurance (pay as you go) Flexible Spending Accounts, just to name a few. They also review and make sure your company is ACA compliant which allows you to spend your time and focus on your business, not on administrative tasks.

Also, if you want to increase your exposure you can advertise on the CALSPPro website with a banner ad, newsletter ad and enhanced member listing. Click on the link below for additional information or e-mail [info@calspro.org](mailto:info@calspro.org). <http://calspro.org/advertise/>

It's been an honor and privilege to serve this association as the Advertising Chair this past year and I look forward to seeing everyone at October's Conference in America's Finest City (my back yard).

Mahalo! 🌺

Robert Porambo • [rporambo@knoxservices.com](mailto:rporambo@knoxservices.com) • 619.549.4853 - cell

## Correction:

In an article entitled Independent Contractor vs Employee Revisited, from the recent issue of CALSPPro Press volume 7 issue 2, the following statement was made:

"... a new lawsuit filed in Los Angeles on March 24<sup>th</sup>, 2014. This action is so recent that at this point it can provide little more than the Plaintiff's allegations of Labor Code and Business and Profession Code violations potentially stemming from the misclassification of employees as independent contractors."

The Complaint filed with the court does not contain any allegation by the plaintiff that the defendant misclassified its employees. The Plaintiff alleges that he was an hourly employee, and no inference should be made otherwise. Further, this case should not be construed to have any similarities with any other case mentioned in the article. 🌺



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Legal Support Professionals

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