



September 2024

A MESSAGE FROM THE PRESIDENT

By Kristan Pujol, M.A., CCPS

Greetings CALSPRO!

Summer is officially over but our CALSPRO mission initiatives continue to be far from it. From our annual conference this month in Sacramento to our pending CALSPRO bill and continuing talks with the CA State Bar to take over registrations, the active engagement and constant actions to promote and protect our interests do not cease.

I am extremely looking forward to seeing you all at our annual CALSPRO Conference this year on September 27-29th. We have the very best education program scheduled for Saturday the 28th and will be rich and insightful with expert panels all day covering topics like referral networking, emerging SOP field technology, electronic SOP, and alternative services including photocopying, discovery and workers' compensation. Participants will be encouraged to ask questions and share ideas with industry experts in an interactive Q&A to promote continuing education, new technology, and industry progress. And to top it off, there will be a CCPS seminar at the end of day! If you have not registered for conference, or are unable to attend, please consider sending your staff to the education seminars on Saturday or consider a sponsorship to help support our CALSPRO legislative agenda.

Our business meeting will start at 8am on Saturday and all are invited to attend and listen to important legal updates from our lobbying team at California Advocates. We will discuss legislative changes and updates including our own CALSPRO sponsored bill AB2067 that (if signed by the governor) will require large financial institutions to have multiple service of process intake locations in California. This is the result of our efforts to find resolution to the backlog of writs/bank levies at sheriff's civil offices, as requested by our membership! Come to conference and hear the latest news live, and what is next in line for CALSPRO!



Kristian Pujol
CALSPRO President

Times Are Changing

With many changes this year like our new active membership categories (as voted by membership), expansion of eFiling mandates in most CA courts, to our upcoming state and national elections, I would be remiss not to mention the retirement of two of our long time CAMS management associates and family. Jennifer Blevins, who is a Rosenthal award recipient, and Stephanie Schoen have done so much for our association throughout the years

and have helped us navigate through many different chapters, challenges and triumphs. We are indebted to them for all their support, professionalism, and dedication to our legal support industry. Come say your goodbyes personally at conference this month!



More heartbreaking was news of the legendary Tom Bowman's passing on August 27, 2024. Tom was a pioneer in the process serving industry, both at CALSPro and NAPPS earning lifetime achievement awards, and a mentor, idol, and friend to many of us. He will be missed forever. A celebration of life will be held on Sunday September 22, 2024. Please refer to details below and/or contact jennifer@caladmanagement.com.

Many blessings and thanks to all our members and their families who continue to support and unite as an association and persevere as a community.
See you soon,

A handwritten signature in black ink, appearing to read "Jennifer".



BEST SERVICE OF PROCESS EDUCATION IN CA - \$300!!

It's not too late. This year is a can't-miss conference! CALSPro, again, has prepared the best education opportunity for process servers in California. We listened and are excited to deliver expert panel discussions on topics that you wanted. This education agenda is packed! We especially want to welcome Exhibitors and Sponsors by offering new exclusive benefits. See below for all conference rates and benefits.



A La Carte Registration

Friday Social Event (includes transportation) \$90

Lunch Only (Saturday) \$100

Banquet Only \$150

Saturday Education & Lunch (no banquet) \$300

[REGISTER FOR CONFERENCE HERE](#)

When: September 27th - 29th, 2024 **MARK YOUR CALENDAR**

Where: Hilton Arden Sacramento

[CLICK HERE TO BOOK YOUR HOTEL](#)



Dan Mora
Conference Chair

Not a member of CALSPro? Join now and receive 10% off of your full conference purchase, including sponsorships. You will receive a discount code upon membership registration.

[JOIN CALSPRO BY CLICKING HERE](#)

EDUCATION, EDUCATION, EDUCATION

[SEE FULL AGENDA HERE](#)

Saturday, September 28th

8:00 am - 8:45 am, Annual Business Meeting

Call to Order and Roll Call, President's Report, Secretary-Treasurer's Report, Proposed Bylaw Amendments, Committee Reports and ratification of the officers and Board of Directors election.

Kristian Pujol, President CALSPro / Michael Kern, Vice President CALSPro / Larry Kirlin, Secretary-Treasurer CALSPro / Jackie Janney, Chairperson of the Board CALSPro

8:45 am - 9:30 am, Legislative Update

The cornerstone of CALSPro, come hear how we are staying ahead of the laws and regulations affecting your business. Hot topics include: Sewer Service, SOP Registration at the Stat Bar, Prison SOP, Financial Institution SOP, and more.

Mike Belote, Esq. & Cliff Costa, Esq., California Advocates, Inc. / Chad Barger, Legislative Chairperson CALSPro

10:00 am - 11:00 am, How Valuable is My Referral Network?

Learn best practices for referrals and affiliate networking from industry veterans. We will be discussing the best methods and tools for keeping existing clients and obtaining new ones.

Moderator: Jason Burke, D&R Legal Process Service, LLC

Panelists: Mike Reid, Mighty Process Servers & Mighty Marketing / Mike Kern, Direct Legal Support, Inc. / Connie Bettencourt, iServe Legal Support LLC / Jerry Topolos, Preferred Legal Services, Inc.

11:00 am - 11:45 am, Emerging Field Technology

The panel will discuss how mobile/field applications, including tracking, compliance and communication, are reshaping our industry and enhancing success through transparency and professionalism.

Moderator: Dennis Barber, United Legal

Panelists: David Nill, Legal Connect / Bob Musser, DreamBuilt Software, Inc. / Jeff Karotkin, Lawgical / Dennis Caples, Tristar Software / Melody Bulso, Provest LLC

1:00 pm - 1:45 pm, Is Electronic SOP Inevitable?

Opportunity or Threat? We will explore electronic service of process best practices and practical considerations and provide real-world examples of how this evolution is impacting the industry.

Moderator: Jeff Karotkin, Lawgical

Panelists: Frank Smithson, Gemini Legal / Larry Kirlin, First Legal / William Sera, My Investigative Services, Inc.

1:45 pm - 2:15 pm, Photocopy Tips and Tricks for New Revenue

Hear from this panel about how to offer photocopy to your clients and affiliates. These insights will help you understand the photocopy landscape and leverage your connections.

Moderator: Tony Klein, Attorney Service of San Francisco

Panelists: Sommer Frietsch, Gemini Legal / Mary McDowell, WestCoast Legal Service, Mikey Katches, Gemini Legal

3:00 pm - 5:00 pm, Process Serving Seminar and CCPS Exam Prep

Prepare you or your staff and learn the essentials of service of process including the elements of service, understanding jurisdictions, tips for difficult serves, and the statutes necessary for compliance.

Moderator: Robert Porambo, Knox Attorney Service

Panelists: Kraig Vorsatz, Esq., Gotcha Legal Services, Andy Estin, American Legal Support Services, Inc., Tony Klein, Attorney Service of San Francisco

EXHIBITORS & SPONSORSHIPS

IT'S NOT TOO LATE!

This year, CALSPRO is offering significant benefits for Exhibitors and Sponsors. Showcase your company alongside the best professional process server education in California. Receive complimentary registration and advertisements. Spots are limited. See offers below.

Exhibit Booth \$950 (\$3,300 VALUE)

Showcase your valuable products and services to industry decision makers. Exhibitors will receive exclusive advertisement, acknowledgement, and access to all hosted events. Exhibit booths are located in high traffic areas. Don't miss this opportunity.

Register by ~~8/26/24~~ 9/16/24 (EXTENDED) to hold your spot.

- \$3,300 VALUE
- 10x10 Exhibit Space
- 2 passes for the Conference education sessions (includes lunch)
- 2 passes to the Saturday Banquet
- 2 passes to the Friday Welcome Event at Topgolf
- Prominent conference program advertisement
- Education session break slideshow advertisement

- Schedule signage
- Registration confirmation email advertisement
- Know-before-you-go email advertisement
- Verbal acknowledgement

DIAMOND SPONSOR \$4,000 (~~\$5,500 VALUE~~) SOLD OUT

- ~~LIMIT 3~~
- ~~\$5,500 VALUE~~
- ~~40x10 Exhibit Space~~
- ~~Exclusive signage and advertisements~~
- ~~2 passes for the Conference education (includes lunch)~~
- ~~2 passes to the Saturday Banquet~~
- ~~2 passes to the Friday Welcome Event at Topgolf~~
- ~~Prominent conference program advertisement~~
- ~~Education session break slideshow advertisement~~
- ~~Schedule, Banquet, and Welcome signage~~
- ~~Registration confirmation email advertisement~~
- ~~Know-before-you-go email advertisement~~
- ~~Verbal acknowledgement~~

RUBY SPONSOR \$3,000 (\$4,000 VALUE)

- LIMIT 5
- \$4,000 VALUE
- 1 pass for the Conference education sessions (includes lunch)
- 2 passes to the Saturday Banquet
- 2 passes to the Friday Welcome Event at Topgolf
- Conference program advertisement
- Education session break slideshow advertisement
- Schedule, Banquet, and Welcome signage
- Verbal acknowledgement

PEARL SPONSOR \$1,000 (\$1,800 VALUE)

- LIMIT 7
- \$1,800 VALUE
- 1 pass for the Conference education sessions (includes lunch)
- 1 pass to the Saturday Banquet
- Conference program advertisement
- Education session break slideshow advertisement
- Schedule, Banquet, and Welcome signage
- Verbal acknowledgement

WELCOME EVENT SPONSOR \$250

- LIMIT 10
- 1 pass to the Friday Welcome Event at Topgolf
- Conference program advertisement
- Door signage
- Verbal acknowledgement

EDUCATION SPONSOR \$750

- LIMIT 5
- Know-before-you-go email advertisement
- Conference program advertisement
- Door signage
- Education session break slideshow advertisement
- Welcome signage
- Schedule signage

- Verbal acknowledgement

EXHIBITOR BREAKFAST SPONSOR \$500

- LIMIT 3
- Elevator pitch and Q&A opportunity (during breakfast)
- Conference program advertisement
- Door signage
- Verbal acknowledgement

EDUCATION BREAK SPONSOR \$250

- LIMIT 3
- Conference program advertisement
- Door signage
- Education session break slideshow advertisement
- Schedule signage
- Verbal acknowledgement

BANQUET BAR SPONSOR \$250

- LIMIT 6
- Conference program advertisement
- Door signage
- Banquet signage
- Verbal acknowledgement

TO EXHIBIT / SPONSOR REGISTER HERE

REGISTRATION FEES

Full Registration

Member \$550

Non-Member \$650

A La Carte Registration

Friday Social Event (includes transportation) \$90

Education Only \$300

Lunch Only (Saturday) \$100

Banquet Only \$150

REGISTER FOR CONFERENCE HERE

If you have questions, comments, or feedback, please contact me anytime at:

Text: 559-805-9571

Email: dan@gemini.legal



IT TAKES A VILLAGE...

By Larry Kirlin

As the Chairman of the CALSPro Membership Committee, I'm pleased to share the progress and efforts made by our team this year. Our mission is to grow and sustain our membership, ensuring that our association continues to thrive and serve our industry effectively. This past July, our committee convened to discuss a new recruitment campaign aimed at increasing membership.

Dennis Barber initially presented a creative idea: offering a pro-rata discount to members who join partway through the year. After careful consideration, we recognized the potential challenges in managing such a discount. Instead, we decided to extend membership terms until December 31, 2025, for those who join now—a solution that is both impactful and simple to implement through Member Clicks.

In addition, we introduced a promotion where existing members can earn a \$25 credit towards any CALSPro invoice for recruiting new members. This initiative has already shown promising results, with eight new member applications received since its launch. While we cannot definitively say that these applications were solely due to the promotion, it's worth noting that it's uncommon for us to receive more than one or two applications in a month. This uptick is an encouraging sign that our efforts are resonating within the community.

I would be remiss not to acknowledge the incredible dedication of the Membership Committee members. Their time, energy, and commitment have been invaluable in driving these initiatives forward. Volunteering for a committee like ours requires a significant sacrifice, often pulling time away from personal and professional obligations. Yet, each member of this committee has shown unwavering dedication to our shared goals, and for that, I extend my deepest gratitude.

The importance of a strong membership committee cannot be overstated. We are the backbone of our association's growth, ensuring that CALSPro continues to represent and support our industry's needs. Our volunteers' efforts to recruit and retain members help secure the future of our association, enabling us to offer more resources, advocacy, and networking opportunities to our members.

As we move forward, I am confident that our committee's initiatives will continue to bear fruit, helping us build a stronger, more vibrant CALSPro community.

Thank you to my fellow committee members for your exceptional work and commitment. Together, we are making a difference.



Larry Kirlin



LEGISLATIVE UPDATE

Your legislative committee continues to work hard on your behalf. August 31st was the deadline for the legislature to pass bills for this year. The bills that passed have been submitted to the Governor for his signature or veto by September 30th which includes our bill AB 2067.

AB2067 – Financial Institutions

This bill would permit a financial institution to designate a third-party agent, as defined, as a central location for service of legal process. If the financial institution designates a third-party agent as a central location, the bill will require the financial institution to designate another central location. The bill would prohibit each central location from being located in the same county as another designated central location. We are optimistic the Governor will sign the bill into law by the deadline.

California's Sewer Service Issue

Our advocates have informed the board that the topic of "sewer service" is floating around the halls of Sacramento. In their conversations, they know of at least one organization that plans to present legislation in 2025 to bring strict regulations, like the ones in New York state. Our advocates and the legislative committee have requested a meeting with this group to offer suggestions that everyone can live with. Last month the legislative committee met to discuss ideas and form a sub-committee to begin to tackle this issue.

Sincerely,

Chad Barger
Legislative Chair



Chad Barger



CALSPRO - CONTINUING EDUCATION COMMITTEE

The Continuing Education Committee is one of CALSPRO cornerstone committees. In my humble opinion it's the most important committee after Legislation.

In 2024 we held 4 workshops and examinations. We had 83 attendees to the workshop and 66 people attended the CCPS examination and 35 people are now have the California Certified Process Servers (CCPS) designation.

The next workshop will be at our upcoming conference in Sacramento on Saturday, September 28th, from 3:00 pm – 5:00 pm

I would like to give a big THANK YOU for my committee members, Jackie Janney, Kraig Vorsatz & Jonathan Shisler for all of their outstanding contributions and support to this committee.

It's been a genuine honor and a distinct privilege to serve the CALSPRO members this past year as the Education Committee Chair and I look forward to seeing you at our upcoming conference in Sacramento.

Mahalo,
Robert Porambo



Robert Porambo



DON'T BE ACCUSED OF SEWER SERVICE

Trust, Transparency, and Technology

In the world of process serving, accuracy and transparency are paramount. However, with increasing pressure to meet tight deadlines and handle high volumes of work, there's a real risk of falling into practices that could be misinterpreted as "sewer service" — the fraudulent act of falsely claiming to have served legal documents. To safeguard your reputation and uphold the integrity of your work, it's crucial to leverage the latest technological tools designed to enhance both efficiency and transparency.

The Risk of Sewer Service and the Role of Technology:

Sewer service is a serious allegation that can have legal repercussions and damage the trust between process servers and their clients. It occurs when process servers falsely claim to have served documents, often leading to default judgments against unaware defendants. This practice not only undermines the legal process but also tarnishes the entire process serving industry.

To avoid even the slightest perception of sewer service, adopting modern **Case Management Software Systems** (CMSS) and in-field mobile applications is essential. These tools not only



Dennis Barber

streamline your operations but also provide irrefutable evidence of your work, ensuring that every service is above board and well-documented.

Enhancing Transparency and Accountability:

One of the primary benefits of using in-field mobile applications is the ability to utilize geotagging, which provides precise location and time stamps for each service or attempt. This technology enables process servers to track and record their exact location when serving documents, offering clear and undeniable proof of when and where the service took place.

By implementing these digital tools, process servers can maintain detailed records of each service, including photos, videos, and GPS coordinates. This level of documentation creates a comprehensive audit trail that can be crucial in defending against any accusations of improper service. Moreover, this transparency builds trust with clients, as they can receive real-time updates and access to service records, ensuring that all legal requirements are met.

Streamlining Operations and Enhancing Compliance:

Case Management Software Systems (CMSS) and mobile applications are not just about transparency; they also significantly streamline the process serving workflow. These systems help with scheduling, route optimization, and document management, allowing process servers to focus on their core task — serving documents.

The software also includes features that ensure compliance with state and local regulations, such as California's Civil Code of Procedures. Integrated notifications and reminders help process servers adhere to legal requirements and avoid any potential compliance issues. By automating these aspects, the risk of human error is reduced, and the overall professionalism and credibility of the process server are enhanced.

Building Trust and Reputation in the Legal Community:

In today's digital age, clients expect more than just timely service; they demand transparency and reliability. By utilizing **Case Management Software Systems (CMSS)** and mobile apps, process servers can provide the level of service that meets these expectations. Real-time status updates, instant notifications, and detailed reports help in building strong relationships with clients and improving overall customer satisfaction.

Furthermore, by embracing technology, process servers can enhance their reputation within the legal community. The use of modern tools signals a commitment to accuracy and professionalism, fostering trust and collaboration with legal teams and clients alike. This positive perception can lead to increased business opportunities and long-term success.

The Future of Process Serving:

As the process serving industry continues to evolve, staying ahead of technological trends will be crucial for success. The integration of mobile apps and case management systems not only helps prevent accusations of sewer service but also positions process servers at the forefront of industry standards.

By adopting these tools, process servers can ensure their work is secure, efficient, and reliable, paving the way for a future where technology and process serving are seamlessly intertwined. This proactive

approach will not only protect your business from legal challenges but also contribute to the overall integrity and reputation of the process serving industry.

In conclusion, don't be accused of sewer service. Embrace the technology available to you, and ensure your process serving operations are transparent, compliant, and above reproach. The tools are here, the future is now — it's time to use them to their fullest potential.

Authored by: Dennis Barber / United Legal / August 2024



The banner features a dark blue background on the left with the text "ADVERTISE WITH US!" in large, white, bold, sans-serif font. To the right of the text are three circular images: the top one shows a man and a woman in a meeting; the middle one shows a woman pointing at a screen; the bottom one shows a woman in a red hat. On the right side of the banner is the CALSPro logo, which includes a blue outline of California and the text "CALSPro" in blue, with "California Association of Legal Support Professionals" in smaller text below it.

Benefits of Advertising with CALSPro

By Esteban Pujol, CALSPro Advertising Chair

It is September and Q4 is right around the corner! This is the perfect time to review any remaining marketing budgets for 2024 while strategically planning for growth in the upcoming year. Allocating resources for advertising before the end of the year maximizes visibility during a critical period when businesses and consumers are finalizing year-end decisions. If you are looking for an option, consider CALSPro. Advertising within a legal support organization offers several key benefits:

- 1. Targeted Audience:** CALSPro reaches a niche market of legal professionals, including process servers, legal support firms, and a broad online audience. Your advertising directly connects you with decision-makers in the legal services industry.
- 2. Enhanced Credibility:** By aligning your brand with a well-established organization like CALSPro, you gain credibility and trust within the legal community, as CALSPro is recognized for advocating and educating in legal support services.
- 3. Expanded Visibility:** Advertising through CALSPro ensures your company's services are visible at key industry events, newsletters, and their website, increasing your brand's reach among relevant professionals across the state.
- 4. Support for Industry Advocacy:** Your advertising helps fund CALSPro's efforts in legal support advocacy, keeping the industry well-regulated and offering protection for legal support professionals.
- 5. Networking Opportunities:** Partnering with CALSPro allows advertisers to engage directly with the broader legal support community, fostering relationships that can lead to future business opportunities.



Esteban Pujol

These benefits make advertising with CALSPro a strategic investment for your business.

Below are some of the current advertising opportunities available and worth consideration.

- **Banner Ads**- rotating ads that are visible on the CALSPro landing page.
- **Newsletter and E-News** advertising slots, which include a free introduction article.
- **E-Blasts** to entire CALSPro membership. Can be used to make announcements, new service coverages, offer a sales promotion or hiring opportunities within your organization.
- **CALSPro Classified's**- Post job descriptions, or equipment for sale. When items are added, CALSPro will send an E-Blast letting members know of new postings.
- **Conference Sponsorships**- a variety of advertising opportunities at the annual CALSPro conference...which is right around the corner!



Thomas J. Bowman, Jr
Mar 30, 1941 – Aug 27, 2024

It is with deep sadness and heavy hearts that we inform you of the passing of Tom Bowman on August 27, 2024.

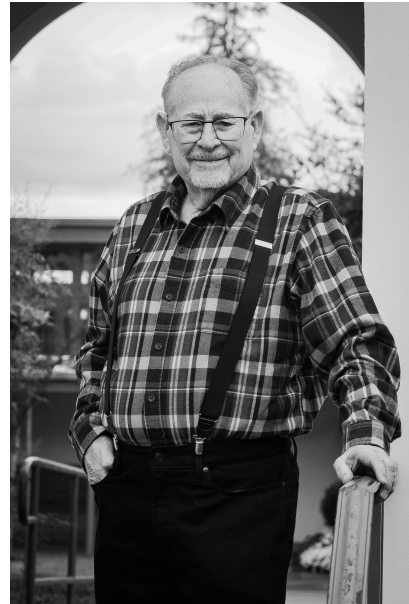
Thomas J. Bowman, Jr. served the association since its inception, including as President for two terms from 1977-1979. Tom received CALSPro's highest honor award, the Bert Rosenthal Memorial Award in 1990 and continued serving in a leadership capacity and on the Board of Directors until earlier this year. Tom was instrumental in leading the association and the industry in its advancement, especially in the legislative area. The association has suffered a profound loss, and we will hold the special memories and teachings of Tom forever in our hearts.

Tom is survived by his beautiful wife, Wendy, and loving children and their families.

A Celebration of Life service followed by a light reception is scheduled Sunday, September 22, 2024, at 1pm.

[Signia by Hilton Hotel](#), 170 S. Market Street, San Jose, CA 95113 in the Club Regent Room

Please RSVP Jennifer@caladmanagement as soon as possible including the number of guests who will be attending.



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VICE PRESIDENT
Michael Kern

One Legal / InfoTrack US

Direct Legal Support, Inc.

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Robert Porambo
Knox Attorney Service

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Jonathan Shisler
A2Z Attorney Services

LEGISLATIVE ADVOCACY

Mike Belote, Esq.
California Advocates, Inc.

2023 New CALSPro Members

Name: Antoinette Garlington
Company: Our Love Enterprises LLC
City: Manhattan Beach
Category: Active Individual
State: CA
Email: ourloveenterprisesllc@gmail.com

Name: Gilbert Campos
Company: Gilbert A Campos (Self Proprietor)
City: Hayward
State: CA
Category: Active Individual
Email: Ntrylsa84@Gmail.com

Name: James Eslick
Company: A Better Process
City: Placerville
State: CA
Category: Active Individual
Email: 2abetterprocess@gmail.com

Name: Chad Conner
Company: Chad Conner Investigations
City: Chula Vista
State: California
Category: Active Individual
Email: cconnerinvs@gmail.com

Name: Daniel Hoefnagel
Company: First Legal
City: Los Angeles
State: CA
Category: Active Individual
Email: danielh@firstlegal.com

Name: Ruven Lupovici
Company: LockJaw Legal Process Services
City: Santa Ana
State: CA
Category: Active Individual
Email: info@lockjawlps.com

Name: Jamie Mariscal
Company: First Legal Investigations

Name: Marissa Mendenhall
Company: Central Coast Justice

Name: Zakikhani Siroos
Company: Top Priority Courier

City: Santa Ana
State: CA
Category: Active Individual
Email: jmariscal@firstlegal.com

City: Atascadero
State: CA
Category: Active Individual
Email: centralcoastjustice@gmail.com

City:
State: CA
Category: Vendor (Complimentary)
Email: cs_mgr@topprioritycouriers.com

Name: Farmaz Sadeghi
Company: Bluebird Office Supplies
City: Los Angeles
State: California
Category: Vendor
Email: farmaz@bluebirdonline.com

Name: Joseph O'Donovan
Company: Legal Errands, Inc.
City: Prospect Park
State: Pennsylvania
Category: Associate Individual
Email: jodonovan@legallerrands.com

Name: Don Haworth
Company: Chicagoland Detective Services
City: Chicago
State: Illinois
Category: Associate Individual
Email: falconpi@aol.com

Name: Andrew Webster
Company: Puget Sound Process
City: Renton
State: Washington
Category: Associate Individual
Email: andrew@pugetsoundprocess.com

Name: Stephen Schneider
Company: DocuCents
City: Corvina
State: California
Category: Vendor
Email: stephen@schneideremail.com

Name: Victor Moreno
Company: VM Process Serving
City: Visalia
State: California
Category: Active Individual
Email: vmprocessserving@gmail.com

Name: Chuck Frakes
Company: Advanced Microsystems
City: Los Angeles
State: California
Category: Active Individual
Email: chuck@photocopyservice.com

Name: Alex Bell
Company: SERVICES UNLIMITED INT'L LLC.
City: Palmdale
State: California
Category: Active Individual
Email: info@unltdservintl.com

Name: Rolanda Breaux
Company: ServeMax, Inc.
City: Ontario
State: California
Category: Active Individual
Email: rb@servemax.org

Name: Jason Cantrell
Company: OmniTrace Investigations
City: Yuba City
State: California
Category: Active Individual
Email: jason@omnitraceinvestigations.com

Name: David Gonzalez
Company: Affirm Investigative Solutions LLC
City: Irvine
State: CA
Category: Active Individual
Email: affirminvestigativesolutions@gmail.com

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Thank You To Our Vendors

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