



ENEWS

January 2025

A MESSAGE FROM THE PRESIDENT

By Kristan Pujol, M.A., CCPS

Greetings CALSPro,

I thank you for electing me to serve as your President once again. It is a true honor to be part of our industry leadership, and I am very excited to continue building upon the pivotal progress we made last year. I am pleased to report 2024 was a successful year for CALSPro legislatively, educationally, and financially, thanks to the support, generosity, and dedicated efforts of all our members, volunteers, and sponsors!

It was so nice to see so many attendees and new faces at our annual conference in Sacramento last Fall. My hope is that the increased engagement will continue and help us sustain our association and businesses through all the economic fluctuations and political changes happening around us. Since the pandemic, many state associations across the country experienced hardship and had to revamp. In 2023 and 2024, we focused on financial sustainability first and foremost, while continuing to pursue our core legislative and educational agendas. With the successful implementation of a new tiered active membership structure this past year, along with popularly attended annual conferences focusing on real-world legal support education, we were able to increase and stabilize our post pandemic revenue stream with a big sigh of relief. Thank you!

Logically, we will continue to push our oath to growth forward with our new active membership options (allowing companies of all sizes to join CALSPro at a rate proportional to what they can afford) and focus on continuing education for all our members (novices and veterans) throughout the year and during our annual conferences. Our financial state sustained the attrition challenge and has been normalized thanks to you!

In 2025, we must now turn our attention to new priority initiatives dealing with professionalizing our industry further and embedding ourselves deeper within the legal structures as trustworthy agents and public servants of due process. Two very important matters were discussed at our annual conference this past October and are at the top of the list. The first deals with moving the California registration process from the county level to the state level under the State Bar, allowing process servers and professional photocopiers to fall under a single state entity (as Notaries and Private Investigators). The other proposal deals with combating claims of sewer service in California (propagated by at least now two consumer groups: CLICC and East Bay CLC) and aims to propose potential new service verification methods for improved transparency.

To further address these two important matters, we have sent a pair of short surveys to the membership. If you have completed them, thank you! If you have not filled them out yet, please do so immediately. We want to hear from you! It is imperative you provide your point of view so that the board of directors may make informed decisions in the general best interest of the association. Potential industry-wide changes impacting our members are taken very seriously and we want to be as open minded and inclusive as possible. Yet we need to be decisive, not divisive, and cease the opportunities that will further allow us to protect, promote (grow and professionalize), and preserve CALSPro and all our supporters.

I hope everyone and their families are safe from all the wildfires and on behalf of all our newly elected Officers and Directors, I thank you for your trust and continued support to CALSPro. We look forward to hearing from you soon!

Stay Safe,



Kristian Pujol

CALSPro President

MEMBERSHIP

Membership Update

At the 2023 annual conference in San Diego, a vote was taken and approved for a drastic change in the membership structure of our association. After a year of review and analysis, the change is viewed as a success that grew the membership. While it can be difficult to compare the tangible number of members from 2023 to 2024, there was an increase in participation at this year's conference. Also, in the year 2024, CALSPro generated more than our 2023 membership revenue by a staggering increase of 16%! All of this can be viewed as positive data for the association's membership. Now is the time to keep the success moving forward!

The challenge of increasing memberships or sales can be a daunting task for any area of endeavor. While you see billions of dollars in revenue from the major sports associations around the world, they are all constantly trying to reach new demographics. We all saw what Taylor Swift and Shohei Ohtani can do when placed into a new market. The challenge for CALSPro as an association is the need to find new members inside of our demographics. Unlike other industries, CALSPro cannot rely on other professions for expansion of our membership; we need to find more of us.

There are more and more ways to meet people today, but still the most impactful way is to just say "Hello!". When standing in a line at the supermarket or out in public, people have met countless contacts just by saying hello. You never know where the conversation will lead, but that person may have valuable insight or the ability to help.

It can also be the same when working in the field; you never know who is behind or in front of you. The next time you are in a line for work, be friendly and say hello to that person you don't know; maybe even say some positive things about CALSPro too! Talk about our legislative agenda and how it protects our association or something you learned at a conference. Hopefully, working together in seemingly small areas can make a dramatic impact on CALSPro's membership in the future!



Matt Janney

[LOGIN TO RENEW YOUR MEMBERSHIP NOW!](#)



Annual Conference Update

CALSPRO's 57th Annual Conference is scheduled for September 19-21, 2025 at The Westin Long Beach. Mark your calendars!

Our goal is maximum participation. To achieve this, we're planning the best education opportunity for process servers in California. CALSPRO has over 50 years of rich and productive legislative advocacy. Industry leaders will gather and share their best practices. Network and promote your business to other process servers.

We need your feedback. What topics do you need to hear about? We are currently developing our education agenda. We need to hear from you so we can make this year's education better than ever.

Please email me at dan@gemini.legal with your ideas or questions.



Dan Mora





Additional 2024 conference photos can be viewed on the event page below.

CONFERENCE PHOTOS



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LEGISLATURE

LEGISLATIVE UPDATE

As the 2025-2026 legislative session kicks off, our dedicated legislative team is in full swing, committed to protecting, preserving, and promoting our industry. We've assembled a powerhouse committee, already collaborating with our advocates to combat potentially harmful legislation. Meet your legislative champions: Jackie Janney, Andy Estin, Tony Klein, Michael Kern, Jeff Karotkin, Kristian Pujol, and Chad Barger. From tackling issues like "sewer service" to addressing registration shifts to the California State Bar, we've got a full agenda.

I want to draw your attention to some key issues we're tackling this year and keep you updated on new laws and procedures that impact you. Stay informed, stay engaged, and let's navigate these changes together!

Sewer Service Issue

Last year, we successfully navigated our first challenge with legal aid consumer groups over Assembly Bill 2347. The proposed bill aimed to amend Evidence Code 647, potentially stripping away the presumption that our declarations, made under penalty of perjury, are factual. Thanks to CALSPro's swift action and direct communication with the bill's author, we managed to have this language removed.

Looking ahead, we are aware that several consumer advocacy groups are gearing up to address service of process issues in the 2025-26 legislative session. The process serving industry in California is under increasing scrutiny from influential organizations like the East Bay Community Law Center (Consumer Justice Clinic) and the California Low-Income Consumer Coalition (CLICC). These groups have raised alarms about alleged "sewer service" incidents, where legal documents are reportedly mishandled, potentially compromising due process. While there is no evidence of widespread problems, we are concerned that the California Legislature might act on anecdotal accounts, presenting potential challenges for our industry.

We recently reached out to our members with an important update regarding our industry's future. We want to know: Do you support a proactive approach, collaborating with consumer groups to address perceived concerns and influence potential legislation? Or do you prefer a wait-and-see strategy, addressing issues only if they arise? If you haven't yet responded to our survey, please take a moment to share your thoughts. Your opinion is crucial—make your voice heard!

Moving Registrations to the State Bar

Years ago, we introduced a bill aiming to transfer process server and professional photocopier registrations to the State Bar of California. At the request of the Chief Justice of California at that time, we paused our efforts to allow the State Bar to make internal adjustments to better handle our registration program. Now, after significant progress, the State Bar is prepared to bring us into their framework.

Given the time that has passed, we want to ensure this move still aligns with the goals of CALSPro and our members. Our committee is crafting an update and survey, which will be sent to you soon. This will detail the potential benefits and drawbacks of such a change and offer you a chance to share your thoughts. Keep an eye out for this survey in the coming weeks.

New Writ Declaration

In 2024, Assembly Bill 2837 was signed into law by the Governor, introducing an important new requirement for judgment creditors. This law mandates that judgment creditors must provide a declaration to the levying officer stating that the judgment creditor has verified using reasonable diligence within the past 12 months that the judgment debtor's address is correct to the best of the declarant's knowledge, and describing the verification dates and the methods used, which may include, but are not limited to, the following methods:

- (A) Receipt of correspondence from the judgment debtor, dated no more than 12 months before the execution of the declaration, that includes a return address or other comparable verification of the judgment debtor's address.
- (B) Transmittal of a letter by certified mail, or other method of transmission through the United States Postal Service providing a return receipt, to the judgment debtor's address, with a return receipt dated no more than 12 months before the execution of the declaration that is signed by the judgment debtor.
- (C) Verification of the judgment debtor's current address by a commercial address verification service, including skip-tracing, or, if reasonably available, a public record database, followed by dispatch of a letter, by first-class mail to the verified address, that was not returned to sender.

The levying officer shall not accept or serve any writ, order, notice, or other paper on any person if the judgment creditor fails to provide a declaration as described in paragraph (2).

There's been some confusion within the legal community about drafting declarations to meet the new requirement. However, I've received word from two sheriff departments that the Judicial Council is currently developing a form to address this need. We'll keep you updated as more information becomes available.

New IRS Mileage Rate

Starting January 1, 2025, the IRS standard mileage rate for business-related transportation or travel expenses has increased to \$0.70 per mile, up from \$0.67. For process servers, where driving is integral to the job, this additional three-cent deduction can help offset some taxes. Remember to consult a tax professional to understand how this change impacts your specific situation.

New Laws for 2025

Each year, hundreds of new laws take effect in our great state. Below are a few links to reliable news sources who are pointing out some of the laws that affect us.

California Courts Newsroom: <https://newsroom.courts.ca.gov/news/new-california-laws-going-effect-2025>

CBS News: <https://www.cbsnews.com/sacramento/news/california-new-laws-2025-january/>

It remains my great honor to serve on our legislative committee. Alongside my co-chair, Kristian Pujol, we are committed to doing what's best for our association and will tirelessly advocate to ensure our future success. Your comments and support are invaluable to us. Thank you for being part of this journey!

Sincerely,

Chad Barger, Legislative Committee Co-Chair



Chad Barger

Legislative Chair



Chad Barger

EDUCATION

CALSPRO - CONTINUING EDUCATION COMMITTEE

Exciting Updates from the Continuing Education Committee

As we move into 2025, the **Continuing Education Committee** - comprised of **Jeremiah Jones (Chair)**, **Kraig Vorsatz**, **Jackie Janney**, **Kristian Pujol**, **Dan Mora**, **Dennis Barber**, **Jessica Talamantes**, and **Jonathan Shisler** - has been hard at work on initiatives to enhance process server training and education.

Upcoming CCPS Workshops:

- **Wednesday, February 12th** (Lincoln's Birthday) – Virtual
- **Saturday, April 12th** – Virtual
- **Thursday, June 19th** (Juneteenth) – Virtual
- **Saturday, August 2nd** – In Person & Virtual (Sacramento)
- **Saturday/Sunday, September 20th/21st** – In Person (CALSPRO Conference, Long Beach)
- **Friday, September 26th** (Native American Day) – Virtual

In addition to these workshops, we are making several **revisions to the current CCPS Workshop curriculum** to ensure it remains up-to-date and valuable for all participants.

We're also excited to announce that we are working on the development of a **new "Introduction to Process Serving" course** tailored for new process servers and office staff. This course will provide foundational training to help new professionals get started in the industry.

To further support ongoing learning, we are in the process of creating **training videos** on specific process serving topics. These videos will be available for purchase at a **nominal fee** on the **CALSPRO website**, offering members an easy way to access targeted training on demand.

We look forward to sharing more updates soon and hope to see you at one of the upcoming workshops.

Jeremiah Jones

Continuing Education Chair



Jeremiah Jones

Technology the Key to Transforming Your Process Serving Business?

Today's process-serving industry is more challenging than ever. Growing compliance demands, clients who expect real-time updates, and rising operational costs are challenges you likely face every day. But there's good news: with the right technology, these challenges don't have to slow you down.

Imagine a workday where you can manage everything from your mobile or smart device, track your team in the field, and provide clients with instant updates. Manage your case documents, notes, create and sign proofs of service from virtually anywhere. Many of the leading process serving companies are already using case management software systems (CMSS) and mobile applications like Serve-Manager, TriStar, Paper Tracker, and PST for their Process Serving businesses. Here's why you should too.

Why Invest in Case Management Software?

Real-Time Tracking and Accountability

Imagine having each attempt geo-tagged, reported in real time, and securely logged. With CMSS, you can document service attempts as they happen, providing indisputable proof that your team is doing its job right. This accountability is key to preventing disputes, ensuring client satisfaction and compliance with all legal and local regulations.

Compliance Made Simple

With built-in compliance reminders, CMSS can help you stay ahead of ever-changing legal requirements. Automated alerts help reduce and identify legal risks, while keeping your team on track.

Instant Client Communication

Today's clients want updates at the speed of business. With CMSS and mobile applications, you can send instant notifications and updates to clients, allowing them to track the status of their cases as they happen. This level of communication helps strengthen client relationships and sets you apart.

Effortless Scheduling and Document Management

Imagine scheduling, managing case documents, accessing files, and dispatching service requests from anywhere anytime. With CMSS, you'll have everything you need in one secure place—whether at the office, in the field, or on the go. This convenience saves time and ensures you always have the latest information.

Build Client Trust with a Transparent Process

Using CMSS helps you establish a clear, traceable audit trail, demonstrating transparency and accountability. Your clients can trust that every service is logged accurately and securely. No more lost Field sheets. Helping protect you from unfounded claims and strengthening your reputation.

Scalability for Growth

CMSS isn't just a tool for today—it's built to grow with you. Case management software scales to support your process serving business, whether you're handling 50 or 5000 jobs a month. Many systems even offer add-ons like e-filing, client payments, and customizable workflows, allowing you to expand seamlessly.

Is CMSS Right for Your Business?

When considering CMSS, think about these critical questions:

- **Where Can You Save Time?** Which daily tasks slow you down? CMSS can streamline your workflows, save time, and reduce the risk of errors.
- **What Do Your Clients Want?** Today's clients expect transparency and quick responses. CMSS helps you meet those demands, building client satisfaction and loyalty.
- **Is Your Business Growing?** If expansion is in your plans, consider how CMSS can support your journey with scalable solutions that grow with you.
- **What's Your Return on investment?** Investing in software is a big step. Weigh the cost against the benefits: time savings, fewer errors, better client relationships, and a reputation as a modern, tech-savvy legal services provider.
- Ready to Modernize Your Process Serving Business?

Investing in technology isn't just a nice-to-have; it's a way to future-proof your business. Case management software can bring efficiency, transparency, and client satisfaction to new levels. Start exploring your options and find the right fit for your goals—you'll soon wonder how you managed without it.



Dennis Barber



It's Renewal Time!

By Esteban Pujol, CALSPro Advertising Chair

Happy New Year! It's that time again— we're reaching out to our valued advertisers to encourage you to renew your advertising options. This is a great opportunity to promote your company and services while continuing to support CALSPro. Your continued sponsorship plays a crucial role in advancing our mission and preserving the strength of the legal support industry.

Please log into the [members only section](#), locate the "**Advertise With Us**" on the side tab to get started!

Advertising options:

- **Banner Ads:** These rotating ads appear on every landing page of the CALSPro website. When clicked, they redirect users to your company's website, maximizing visibility and traffic.
- **Newsletter and E-News Ads:** Released five times a year via email, these contain clickable advertisements that direct users straight to your website, ensuring targeted exposure.
- **NEW – E-Blasts:** Perfect for urgent or specific announcements, such as job postings, office relocations, or introducing new services. Share your message directly with CALSPro members for immediate visibility.
- **NEW – CALSPro Classifieds:** An excellent platform to post job opportunities or sell equipment within the industry. Simply provide your content and images, and we handle the rest. The Classifieds serve as a centralized hub for members, with new postings announced via e-Blasts to keep everyone informed.

Save big with our bundled options! Use promo code FLASHSALE25 to enjoy 25% off your advertising order. Offer valid through January 31st!!



Esteban Pujol

Risk Management Strategies for California Process Servers:

Handling Assaults and Leveraging Worker's Compensation

In my intro article, I stated that future issues would cover a number of insurances relate topics hoping to educate you on the types of coverage you need in this industry, how to buy coverage, how to prevent claims and how to respond when a claim occurs. This is the first in a series of articles focused on the Process Serving Industry.

Process serving in California can be a high-risk job, as some recipients react aggressively or even violently. While these incidents are rare, they can escalate quickly. Process servers must be prepared to protect themselves, document the event, and pursue legal action if necessary. The CALSPro Process Server's Quick Action Guide provides an excellent source of what to do if assaulted.

The guide outlines the essential steps to take if assaulted. But what happens if you're a sole practitioner starting out with no medical insurance and now are losing wages because you can't work? Let's come back to that!

The Reality of Process Server Assaults

Process servers frequently face volatile situations, especially when delivering sensitive legal documents. While avoiding conflict is always the goal, having a clear action plan helps you manage an assault incident efficiently.

9 Essential Steps for Process Servers After an Assault

1. **Get to Safety** – Immediately leave the dangerous situation.
2. **Assess Injuries** – Check for injuries, take photos, and seek medical help if necessary.
3. **Check Property** – Inspect belongings for damage and document it.
4. **Ensure Nothing is Missing** – Confirm you haven't lost any personal items.
5. **Contact Authorities** – Always file a police report.
6. **Document the Incident** – Write down key details and take photos of injuries and damages.
7. **Notify Employer/Client** – Inform them of the incident and check workers' compensation options.
8. **Contact Your State Association** – Report the assault for guidance and advocacy support.
9. **Report to PAAPRS** – Register the incident with the National Process Server Assault Database.

These condensed steps help you stay safe, document the assault, and get the necessary legal support.

Let's revisit that sole practitioner starting out with no medical insurance and now are losing wages because you can't work. What happens when there is a physical injury that results in medical costs and lost wages. If you're with a larger employer with employees, that's simple, workers' compensation will take care of the medical costs and lost time. But what if you're a

one-person shop? You're just starting your business and doing everything you can to save money and get the business established. If you have medical insurance that's great, it will cover the medical costs minus your deductible.

Unfortunately, it's not going to cover lost wages unless you have a temporary disability policy. But what happens if you don't have medical insurance or a TD policy. How do you cover the medical costs and lost wages? If you're a one-person Process Servicing firm, you should consider getting a worker's comp policy for yourself. A worker's comp policy from the State Compensation Insurance Fund (SCIF) is a minimal cost and provides some of the best medical care coverage with no deductibles. Obviously, this is not going to cover routine illness that a medical insurance policy would. But if you're starting out and want to cover injuries on the job and lost wages, this is the best option for you. As time goes on and you build your business you can add a medical coverage policy to cover you and other employees.

The Benefit of Workers' Compensation for Process Servers

If you are injured on the job, whether from an assault or any other work-related accident, workers' compensation is a critical resource. Workers' comp can cover:

- **Medical Costs:** Treatment, hospital visits, and rehabilitation expenses related to your injury.
- **Lost Wages:** If your injury prevents you from working, you may be eligible for compensation to cover lost income during recovery.
- **Support for Long-Term Injuries:** If the injury causes long-term disability, workers' compensation can offer ongoing financial support.

By leveraging workers' compensation, one person process servers shops can minimize the financial burden of medical bills and recovery time, making it an essential tool in risk management.

Conclusion

Process serving is a profession that comes with certain risks, but knowing how to respond to an assault and understanding the benefits of workers' compensation can help ensure your physical, emotional, and financial well-being. By following these steps and leveraging the protections available to you, including medical coverage under workers' compensation, you can navigate challenging situations more confidently and safely.

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Larry Sukay

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