



# ENEWS

**August 2025**

## **A MESSAGE FROM THE PRESIDENT**

Greetings CALSPPro,

This past year we have worked tirelessly responding to and amending Assembly Bill 747. Our efforts to raise funds, advocate for changes to the bill and launch an unprecedented public relations campaign have been very successful! I highly encourage you to please read all CALSPPro AB747 legislative updates included here and in our media posts and eblasts.

At this juncture, I draw your attention to **three important action items** right in front of us which we have complete control over:

- Our **Public Relations campaign** launched in May brings awareness of AB747, the crucial role we fulfill for the judicial system and the value of CALSPPro to our entire industry. We encourage you to please read, engage and react to our social media posts! With daily information being shared in varying platforms including Instagram, LinkedIn and Twitter, our aim is to reach all interested parties and continue informing and educating the public about our legislative efforts and educational agenda.
- **CALSPPro's 57th Annual Conference** is right around the corner next month and we need to promote attendance and participation! Please register your people as soon as possible and help socialize this important event with colleagues, contractors, and vendors. Please read the Conference information section below with event lineups to take full advantage of every opportunity: *Golf, Friday Night Network, Business Meeting, AB747 Discussion, Education Panels, AI Presentation, Recruitment Fair, etc.* It is all happening next month, thanks to

CALSPRO! I look forward to seeing many of you in Long Beach and meeting new faces and forging lasting friendships!

[REGISTER FOR THE CONFERENCE HERE](#)

- The 2025-26 **CALSPRO Officer and BoD Elections** are underway, and it has never been more important to get involved, nominate eligible members and help mold new leaders. So, get involved! With bills like AB747 and the likelihood of similar bills from consumer groups in the future, it is imperative to be prepared and put the right people in place to lead, sustain, and take us into the next decade of legal support services and protections. Candidate Bios are scheduled to go out this week so please be sure to participate and VOTE!

We accomplished so much so far this year but still have the final mile to go. With AB747 likely to move for a vote in both houses in the next 2-3 weeks, the stakes are still very high, and the final verdict remains to be heard. We must do everything we can within our power to continue to increase public awareness about the critical role we play in the legal system and the importance of CALSPRO, raise the bar in our professional practices and legal status, and prepare our members and our entire industry for what comes next.

Stay Safe,

A handwritten signature in black ink, appearing to read 'Kristan Pujol', written in a cursive style.

Kristan Pujol, M.A., CCPS



**Kristian Pujol**

CALSPro President



**MEMBERSHIP UPDATE**

I'm pleased to report that 2025 has been a highly successful year for CALSPro membership. As of the July 31st membership report, we had **201 active members**, up from **178 in May**—a clear sign of momentum and renewed engagement within our profession. Notably, **Voting Membership** now totals **226**, with growth seen across nearly every organizational category.

In addition to the reported 201 members, **two new members joined in August**, bringing our current total to **203**. This growth is encouraging and reflects a strong interest in the benefits and advocacy that CALSPro offers.

This upward trend in membership can be directly attributed to CALSPro's advocacy efforts in Sacramento, particularly the introduction of **AB 747**. This legislation not only threatens the critical role our members play in the legal system but also reinforces CALSPro's influence in shaping the regulatory environment that affect our work.

Looking ahead, the energy from our growing membership is sure to be felt at **this year's annual conference in Long Beach, California**. With increased participation and such a desirable location, we anticipate a well-attended and high-impact event filled with networking, professional development, and celebration of our collective achievements.

Thank you to all our members—new and long-standing—for your continued support. Let's keep this momentum going.



**Matt Janney**

Membership Chair

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



**Annual Conference Countdown Begins**

[REGISTER FOR THE CONFERENCE HERE](#)

We're just weeks away from this year's annual conference. Don't miss out. If you're ready to grow, connect and learn from your industry leaders, get registered now. We still have many sponsorship and exhibit opportunities, packed with benefits. Showcase your company alongside California's best. Our goal is to bring the best education for process servers in the state. See expert panel discussions on topics that affect your business, including technology, AI, and cross-state jurisdictions.

[EXHIBITOR/SPONSOR REGISTRATION HERE](#)

Swing by the CALSPro **CONNECT** booth to explore our latest recruitment materials and connect face-to-face with our recruiters throughout the conference.

Hotel Reservations: CALSPro guest room rate is \$239.00 per night plus taxes and fees. Please make your reservation by August 28, 2025 to receive this discounted rate.

**The Westin Long Beach**

333 East Ocean Boulevard

Long Beach, California, USA 90802



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 HERE](#)

## Conference Agenda

**Friday, September 19th, 2025**

7:30 a.m. | **28TH ANNUAL JACK C. JANNEY MEMORIAL GOLF OUTING**

3 p.m. | **EXHIBITOR SET-UP**

4 p.m. | **CONFERENCE REGISTRATION OPENS**

6 p.m. - 7:30 p.m. | **WELCOME RECEPTION**

**Saturday, September 20th, 2025**

7:30 a.m. | **REGISTRATION / EXHIBITOR BREAKFAST**

8 a.m. - 8:45 a.m. | **BUSINESS MEETING**

*Kristian Pujol, Kimi Shigetani, Jackie Janney, Dan Mora, Kimi Shigetani*

8:45 a.m. - 9:30 a.m. | **LEGISLATIVE UPDATE**

*Chad Barger, Mike Belote, Cliff Costa, Kristian Pujol*

10 a.m. - 11 a.m. | **IMPACT: AB 474**

*Mike Kern, Jeff Karotkin, Chad Barger, Cliff Costa*

11 a.m. - 11:45 a.m. | **MANAGING TECHNOLOGY**

*Esteban Pujol, Dennis Barber, Larry Kirlin, Frank Smithson*

1 p.m. - 1:45 p.m. | **CROSS-STATE JURISDICTION**

*Paula Ashcraft, Tony Klein, Melody Bulso, Shawn Condrey, Bob Musser*

1:45 p.m. - 2:30 p.m. | **AI FOR LITIGATION SUPPORT**

*Lucas Erb, Founder, AI Experts, LLC. [www.aiexperts.com/about](http://www.aiexperts.com/about)*

3 p.m. - 5 p.m. | **PROCESS SERVING SEMINAR AND CCPS EXAM PREP**

*Jeremiah Jones, Kraig Vorsatz, Jonathan Shisler, Jessica Talamantes*

6:30 p.m. | **BANQUET RECEPTION**

7:30 p.m. | **BOARD INSTALLATION AND AWARD BANQUET**

**Sunday, September 21st, 2025**

9:30 a.m. - 10:30 a.m. | **NEW BOARD OF DIRECTORS MEETING**

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

[DOWNLOAD THE CONFERENCE BROCHURE HERE](#)



**Dan Mora**

Conference Chair

Text: 559-805-9571

Email: dan@gemini.legal







## **LEGISLATIVE UPDATE**

### **CALSPRO Legislative Update: Assembly Bill 747 (2025)**

The CALSPRO Legislative Team has been diligently advocating on behalf of our members throughout the 2025 legislative session. Each year presents increasing challenges, and this year is no exception. With the introduction of Assembly Bill 747, authored by Assembly Member Kalra, our team has dedicated extensive time and effort to engaging in constructive negotiations with the bill's author and sponsors.

Through these efforts, we have achieved significant progress in shaping the bill to better align with the interests of our membership. Below is a detailed comparison of the original provisions of AB 747 (introduced February 2025) with the amendments secured in the Senate Hearing version, alongside our ongoing advocacy priorities and next steps.

### **Before vs. After: Key Achievements**



## **Chad Barger**

Legislative Committee Chair

### **Original Bill (Introduced February 2025)**

- Required process servers to register in every county they work in.
- Required a process server's ID card to be affixed/photographed on every proof of service.
- "Reasonable diligence" = three (3) attempts + at least one (1) at dwelling for all cases
- Eviction notices had to be served like a summons (no post & mail unless full diligence).
- Photo requirements: GPS/time/date stamp + front door photo in every case, no exceptions.
- Some service provisions only applied to registered servers

### **Amended Bill (Senate Hearing Version)**

- Removed multi-county registration. Only home/principal county registration required.
- Removed ID card photo requirement. Only need to list registration details.
- Still applies to all cases for now – CALSPro negotiating to limit to only residential UD cases.
- Restored most of the original UD notice law. Post & mail still allowed in most cases.
- Scaled back: Photo at "entrance" allowed; added safety exception and tech/GPS signal exception.
- Clarified: All service provisions apply to anyone serving process, even if exempt from registration.

## Our Wins So Far

1. Stopped multi-county registration requirement for process servers and process serving agencies.
2. Removed ID card photo requirement from proofs of service.
3. Preserved Section 413.40, ensuring service remains valid even if performed by someone not properly registered.
4. Protected post-and-mail procedures for eviction notices and the ability to serve on the first attempt.
5. Added safety and technology exceptions to the photo requirement rule.
6. Negotiated flexibility to photograph the “entrance” instead of the exact front door.
7. Secured agreement that all service rules apply to everyone, to be documented in a letter to the Journal.

## Ongoing Advocacy

- **Limiting “Reasonable Diligence” Requirements:** CALSPro is actively negotiating to restrict the “reasonable diligence” requirement (three attempts, including one at a dwelling) to only residential unlawful detainer (UD) cases, reducing the burden on process servers for non-UD cases.
- **Further Refinement of Photo Requirements:** While significant progress has been made, we are advocating for additional clarifications to ensure safety and technical exceptions are practical and enforceable.
- **Ensuring Clarity and Fair Application:** We are working to ensure that all provisions are clearly defined and uniformly applied to all individuals’ serving process, regardless of registration status, to avoid ambiguity.

## Next Steps

- **Continued Engagement:** CALSPro will maintain ongoing discussions with Assembly Member Kalra, bill sponsors, and other stakeholders to secure additional amendments that protect the interests of our members.
- **Monitoring Senate Progress:** We will closely track AB 747’s progress through the Senate, providing input and advocating for favorable changes during upcoming hearings.
- **Member Updates:** Regular updates will be shared with our membership to ensure transparency and encourage feedback as the legislative process continues.
- **Bill Link:** <https://legiscan.com/CA/text/AB747/id/3245398>

CALSPro remains committed to representing our members' interests and ensuring that AB 747 reflects the needs of our community. We will continue to provide updates as developments unfold.

Sincerely,



Chad Barger

Legislative Committee Chair

Co-Written by Jeff Karotkin, Legislative Committee Member



**CALSPro - CONTINUING EDUCATION COMMITTEE**

**CCPS Course Expands with New Recruitment Fair Pilot**

CALSPro's Continuing Education Committee has continued to fine-tune the CCPS course, ensuring it remains engaging, meaningful, and relevant to the profession. On Saturday, August 9th, we held our most recent CCPS workshop, incorporating our ongoing refinements aimed at increasing interaction and value for attendees. We are committed to creating an experience that not only prepares participants for certification, but also enhances their day-to-day professional skills.

Looking ahead, we anticipate additional changes to the CCPS course once the outcome of AB 747 is determined. This legislation could have a significant impact on the service of process industry, and we are ready to adapt the course content to align with any new requirements.

In an exciting new development, the August 9th course also served as the pilot for our virtual Recruitment Fair, held in conjunction with the workshop. Seven companies participated, each seeking to connect with process servers who value education and professionalism. The fair was a success, fostering connections between companies and potential servers.

Encouraged by this initial success, we will be piloting an in-person Recruitment Fair at the upcoming CALSPro Conference. While currently small in scale, these events hold promise. If they prove beneficial for both companies and individual servers, we will explore ways to expand them in the future.

**CALSPro's Agency Recruitment Fair (CALSPro Connect)** is happening on Saturday, September 20, from 3:00-6:15 PM at The Westin Long Beach. Participation is included with your conference registration.

The fair takes place immediately following the CCPS course and exam, giving your agency a unique opportunity to connect directly with newly trained and certified process servers who are ready to work.

### **Why attend?**

- Meet candidates in person and start building relationships.
- Strengthen your team with professionals who meet CALSPro's standards.
- Support the future of California's process serving industry.

### **Optional Add-On for Agencies**

Enhance your visibility with a 1-minute video feature (\$100) that highlights your company,

requirements, and contact information. Videos will play throughout the conference at the CALSPro Connect booth.

If you are interested in participating in the Recruitment Fair, either as an attendee or as a company seeking process servers, please contact me at [jejones@magnals.com](mailto:jejones@magnals.com).

Our goal remains clear: to elevate the profession and ensure that CALSPro membership delivers meaningful value to all of our members.



**Jeremiah Jones**

Continuing Education Chair

[CCPS CALENDAR AND REGISTRATION](#)

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# ADVERTISE WITH US!



## CALSPRO Annual Conference is Here!

The 57th Annual Conference has arrived! There's no better opportunity to network and promote your business than right now! Have you considered CALSPRO's advertising opportunities? We're reaching out to our valued advertisers to encourage launching your advertising campaigns. This is an excellent chance to highlight your company and services while continuing your support of CALSPRO. Your continued sponsorship is essential for advancing our mission and strengthening the legal support industry. Please log into the members-only section and click "Advertise with Us" in the side navigation to get started!

### Available Advertising Options:

- **Banner Ads:** These rotating advertisements display on every CALSPRO website landing page. When users click them, they're directed to your company's website, maximizing visibility and driving traffic.
- **Newsletter and E-News Ads:** Distributed five times annually via email, these feature clickable advertisements that lead users directly to your website, providing targeted exposure.
- **NEW: - E-Blasts:** Ideal for time-sensitive or specific announcements, including job postings, office moves, or new service launches. Communicate your message directly to CALSPRO members for immediate visibility.
- **NEW - CALSPRO Classifieds:** An excellent platform for posting job opportunities or selling industry equipment. Simply provide your content and images - we handle the rest. The Classifieds function as a centralized resource for members, with new listings announced through E-Blasts to keep everyone informed.
- **NEW - CALSPRO CONNECT** is offering their digital recruitment booth at the conference: \$100 for a one-minute video on a continuous loop as well as a \$50 for a 1 to 3 slides with a QR code Digital Brochure



## **Esteban Pujol**

CALSPro Advertising Chair

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### **Why CA Process Servers Should Consider Supplementing Their General Liability Policy with Professional Liability Insurance**

As a process server in California, you play a critical role in the legal system, ensuring that legal documents are properly served. While most process servers carry General Liability (GL) insurance to protect against physical damage or injuries that may occur during their operations, this coverage alone may not be sufficient to address all potential risks. This is where supplementing your GL policy with additional forms of insurance, such as Professional Liability Insurance (also known as Errors & Omissions insurance or E&O), becomes crucial.

#### **General Liability Insurance: What It Covers**

General Liability insurance protects against bodily injury, property damage, and personal injury claims resulting from incidents like an accidental slip and fall on a client's premises or unintentional damage

to someone's property during the course of business. However, it does not cover the more specific risks related to the actual services you provide.

## The Gaps in General Liability

While GL insurance is essential, it has significant limitations, particularly when it comes to claims that arise from the professional services you offer. For example, if a process server makes an error or is accused of failing to serve documents properly, leading to missed court dates or legal repercussions, General Liability will not cover these scenarios. **Professional Liability Insurance** steps in to fill this gap, addressing claims of negligence, mistakes, or errors in the performance of your professional duties.

## Why Professional Liability Insurance Matters

1. **Protection Against Legal Errors:** In the event of an error in serving legal documents, such as serving the wrong person or failing to meet a crucial deadline, you could face lawsuits for negligence. Professional Liability Insurance helps cover the legal costs, settlements, and judgments that might arise from such claims.
2. **Mistakes Can Be Costly:** Even a small error in document service can have significant consequences for your clients, including delays in legal proceedings or even lost cases. With E&O insurance, you are protected from financial loss stemming from lawsuits or claims related to these errors.
3. **Peace of Mind for High-Risk Situations:** Process servers often work in tense, high-stakes situations. Whether it's serving documents in a hostile environment or ensuring documents are delivered within a narrow window of time, there's always the potential for mistakes. Having Professional Liability Insurance offers peace of mind, knowing that you're covered if something goes wrong in these high-pressure moments.
4. **Client Assurance:** Having Professional Liability Insurance not only protects you but also reassures your clients that you're committed to offering a professional service with minimal risk. Many clients prefer working with insured process servers, knowing they have recourse if something goes wrong.

## Other Supplemental Insurance to Consider

In addition to Professional Liability, process servers may want to consider other types of insurance to further protect their business:

- **Cyber Liability Insurance:** If your business handles sensitive client information electronically, you may be at risk of a cyberattack. Cyber Liability Insurance can help cover the costs associated with data breaches or cyber threats.

- **Workers' Compensation Insurance:** If you have employees, this insurance is legally required in California. It helps cover medical expenses and lost wages if an employee is injured on the job.
- **Commercial Auto Insurance:** As a process server, you are likely to spend a considerable amount of time on the road. Commercial Auto Insurance protects your vehicle and any liabilities that may arise from accidents while performing your job.

## Conclusion

For California process servers, relying solely on General Liability insurance can leave significant gaps in coverage, particularly when it comes to professional errors or negligence. By adding Professional Liability Insurance to your policy portfolio, you can safeguard your business from costly lawsuits and potential financial ruin. In a profession where the stakes are high and the risks are real, this supplemental coverage is not just a wise choice—it's essential.



### Larry Sukay

CALSPRO Member since 2019

(760) 822-2030

lsukay@acrisure.com

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## **CALIFORNIA ASSOCIATION OF LEGAL SUPPORT PROFESSIONALS**

### **BERT ROSENTHAL MEMORIAL AWARD**

Each 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 or entity 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 clear understanding of the role the legal professional plays in our justice system. He encouraged the involvement of all, mentoring many younger members. He had both the character and the strength to challenge everyone to work for the common good of our profession. He exemplified everything for which this award stands.

The committee consists of the current CALSPro President, all past presidents who are members in good standing of the association, and past recipients of the award. A recipient must be selected by two-thirds of the eligible voting members of the committee. Should a recipient be chosen, the name will be announced during the banquet at the CALSPro Conference on September 28, 2024 at the Hilton Sacramento Arden West. It is tradition that the recipient shall present their acceptance speech at the following year's Conference.

#### **The nominees for 2025 are:**

- **Tom Alkema**
- **Kristian Pujol**



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## **Tom Alkema**

Tom Alkema was born and raised in Southern California and began working full time at Ronsin, his family business, in 1979. He has held many positions at the company including, in office customer service representative (calling custodians of records to arrange copying and taking client calls); as a field representative (serving subpoenas and copying records using the old Kodak RP1 rotary camera); then into the collections department (chasing down deadbeat clients); as an account manager (meeting with existing and onboarding new clients); as the sales manager (looking for whales to land) where he oversaw the expansion into their statewide operations; as the president through the COVID period; and finally is currently the CEO.

In 2022 Tom knew it was the right time to follow in the footsteps of his father and cofounder, Bob Alkema, and moved to semi-retirement. Today the company is being managed and run by a 30+ year employee while Tom monitors things from a far.

In this new phase of his life, Tom stays active in CALSPro, spends time travelling with his wife of 35 years to see his 4 grandchildren in Germany and his one granddaughter in Oklahoma. He loves cheering on his Los Angeles Rams and USC Trojans and is working very diligently on his golf slice (sad face). He wants you all to know his calendar is open to anyone wanting to get out and play a round of golf.

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**Kristian Pujol**

Kristian Pujol has been in the attorney service industry for over 25 years. Son of Salvador and Sheila Pujol, he is a second-generation legal support provider who has dedicated most of his entire life to this industry. After living in Costa Rica in his early childhood, Kristian was raised in the San Fernando Valley and then moved to Ventura County in the 1990s. There he worked at Commercial Process Serving Inc. for numerous years alongside family.

After four years of service in the US Air Force and earning an Associate of Science in electronics from the College of the Air Force, he transferred to UCLA where he earned a Bachelor's Degree in political science and business administration in 2000. He then went on to earn a Master's Degree from UC Santa Barbara in 2005 while he taught subjects like Criminal Justice and Political Philosophy to undergraduates. Since then, he has presented at local colleges and to the general legal community via countless seminars, webinars and MCLE accredited courses from numerous sources including CALSPro.

Kristian has always aspired to higher education and his success is due to both his dedication to higher learning and the support provided by his life-long "gig" job of serving and filing legal documents. The combination of the two have helped him propel and thrive.

His deeper involvement with CALSPro began in 2014 when he was elected on the Board of Directors. Since then, he has served on various CALSPro committees including Legislation (current co-chair), Continuing Education (previous chair), Photocopy, Newsletter, Conference, Technology, Assault, and Membership (previous chair). In 2017, Kristian was awarded CALSPro Member of the Year for expanding membership benefits (like the CALSPro mobile app) at strategy session with industry leaders, and in 2018 & 2019 won the President's Award. He is currently serving as President of the association for a third straight year and is still very enthusiastic about the future and exciting possibilities for CALSPro.

Since 2020, Kristian has been working for InfoTrack US, Inc., a legal technology company, running and supporting operations for One Legal. He is joyfully married to his long-time love Kristi Michele, and they have two young wonderful sons named Elias and Isaak. Like his parents, Kristian is a testament to the American Dream.

**Past Bert Rosenthal Memorial Award Recipients:**

1978 | Bert Rosenthal (In Memoriam)

1979 | Michael Buter

1980 | Andrew R. Estin

1981 | Richard J. Green

1982 | Not Awarded

1983 | Carl Strang

1984 | Hugh Hallenberg

1985 | Connie R. Melvin

1986 | Jaunita Tanzer

1987 | Not Awarded

1988 | Not Awarded

1989 | Elaine J. Erdman

1990 | Thomas J. Bowman, Jr.

1991 | Michael O. Price

1992 | Joseph H. Karotkin

1993 | Not Awarded

1994 | Frederic A. Blum

1995 | Tony Klein

1996 | Not Awarded

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 (posthumous)  
2009 | Herbert E. Hoffman  
2010 | Not Awarded  
2011 | Steven Janney  
2012 | Mike Belote  
2013 | Brett Peters  
2014 | John Perez  
2015 | Jennifer Blevins  
2016 | Michael Kern  
2017 | Not Awarded  
2018 | Chad Barger  
2019 | Not Awarded  
2020 | Not Awarded  
2021 | Not Awarded  
2022 | Robert Porambo  
2023 | Larry Kirlin  
2024 | Not Awarded

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## **2025 Officers and Board of Directors**

### **PRESIDENT, BOARD MEMBER**

Kristian Pujol

One Legal / InfoTrack US

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**VICE PRESIDENT, CHAIRPERSON OF THE BOARD**

Jackie Janney

Janney & Janney Legal Support Service

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**SECRETARY-TREASURER, BOARD MEMBER**

Dan Mora

Gemini Legal

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**BOARD MEMBER**

Chad G. Barger

Attorney's Certified Services

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**BOARD MEMBER**

Dennis Barber

United Legal Support Services, Inc.

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**BOARD MEMBER**

Matt Janney

Janney & Janney Legal Support Service

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Larry Kirlin

First Legal Support

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**LEGISLATIVE ADVOCACY**

Mike Belote, Esq. and Cliff Costa, Esq.

California Advocates, Inc.

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## 2025 New CALSPro Members

**Name:** Ted Kennedy

**Company:** T R Kennedy Express Process, LLC

**City:** Columbia

**Category:** Associate Individual

**State:** South Carolina

**Email:** [trkennedyexpressprocess@gmail.com](mailto:trkennedyexpressprocess@gmail.com)

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