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CALSPRO PRESS

California Association of Legal Support Professionals

Introducing



Access • Educate • Collaborate

Where Community Builds Opportunity



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President's Message

JACKIE JANNEY
2026 CALSPro President

CALSPro Family, Members, and Friends ...

As we begin this new year together, I want to start by saying how truly honored and grateful I am to serve as your President this year. Thank you for placing your trust in me and for the opportunity to serve alongside you. This association has always been more than an organization to me – it is a family. A family built on decades of service, mentorship, and shared experiences that have shaped who we are, both individually and as an association.

When I think of CALSPro, I think of the stories, the laughter, the late nights, the lessons learned, and the friendships that have carried us through every change in our industry. Those memories remind me that while the world around us continues to evolve, our foundation – our integrity, dedication, and unity – remains strong.

This year, our focus is on three simple but powerful words: Connect. Collaborate. Educate. These words are not just what we do, but who we are.

Through connection, we strengthen the bonds that make this association a true community. Whether it is through CALSPro Connect, regional events, job recruitment, or mentoring the next generation, we are building bridges that bring people together – across experience, across technology, and across the state.

Through collaboration, we continue to prove that when we share knowledge, ideas, and resources, we all rise. No one

succeeds alone in this industry – and that is the beauty of CALSPro. We grow stronger when we help each other.



This year, our focus is on three simple but powerful words: Connect. Collaborate. Educate. These words are not just what we do, but who we are.



Through education, we continue our legacy of preparing our members for the future. That means teaching not only the fundamentals of service but also the skills that allow us to adapt and build strong businesses in an evolving legal and technological landscape.

Now, I know that with change often comes uncertainty. New legislation, technology, and shifting expectations can sometimes make us feel like the ground is moving beneath us. Change invites uncertainty, but unity transforms it into strength –

and that is where we, as CALSPro, stand strongest.

This year, I want us to embrace the integration of the old and the new – honoring the traditions that brought us here while pioneering new ways to move forward. CALSPro has always been at the forefront of progress in our industry, and we will continue to lead with courage, creativity, and care.

As your President, I see this year as a turning point – a year where we deepen our connections, celebrate collaboration, and empower each other through education. A year where we do not just adapt to change but define it.

So, as we begin this new chapter together, let us remember that CALSPro is not just an association – it is a home. And every one of us is a family member within it.

Let us continue to lift one another up, share what we know, and lead with the same integrity and heart that built this association 50 years ago.

Together, let us connect, collaborate, and educate – not just to survive change, but to shape the future of our profession.

Here's to a year of unity, courage, and growth.

Here's to the CALSPro family – stronger together than ever before. With gratitude and confidence in our shared journey. 🌟



Capitol Report

MICHAEL D. BELOTE, ESQ. &
CLIFF COSTA, ESQ.

California Advocates, Inc.

Ch-Ch-Ch-Ch-Changes

With 2025 now behind us, there is no doubt that the year was a big one for CALSPro in legislative terms. CALSPro leadership and Legislative Chair Chad Barger did a masterful job navigating the issues presented in AB 747 (Kalra), which both moved process serving into 21st century technology, and posed massive challenges to the industry. Governor Newsom signed the ultimate, oft-amended bill in October, but minor clean-up issues remain for 2026, with the measure scheduled to become operative on January 1, 2027. There may also be a need to protect the fundamental pillars of the bill, including the critical principle that all persons serving process should be subject to the same technology requirements, to protect the due process rights of litigants.

The deadline for Governor Newsom to sign or veto bills was barely past when the single-issue general election occurred in November, asking voters to suspend the decades-old redistricting commission process for drawing Congressional boundaries in favor of boundaries designed to elect more Democrats. The goal was to help elect perhaps five more Democrats to Congressional seats next year, to counteract an equal and opposite effort in Texas to elect more Republicans.

The reason the ballot initiative was important to CALSPro, and any other organization active in state legislative affairs, was that it has already, and will continue to, set off a chain reaction of musical chairs in

Sacramento. Congressional seats are highly desirable for state legislators because of three practical reasons: higher pay, a pension, and no term limits. At the same time that all statewide constitutional offices will be on the ballot in 2026, so too will be the newly-drawn Congressional seats, assuming the courts do not strike down the maps. Democratic state legislators in the affected areas are already jockeying for position and assessing their changes.

Further changes are coming next year because 2026 will be Gavin Newsom's last year as governor. Term limits also will operate to end the legislative careers of quality members of the Assembly and Senate, many of whom are friends of the courts and CALSPro. A perfect example is Senator Tom Umberg (D-Santa Ana), who is currently Chairman of the critically-important Senate Judiciary Committee, and a veteran civil litigator in his own right.

All told, when the November general election results are finally tallied, we will have seen well over half of the legislature turn over in the last several years. That kind of turnover puts a premium on having a steady presence in Sacramento, understanding the changing makeup of the legislature and making sure that key legislators know who represents the attorney service and photocopying communities in the state Capitol. The CALSPro story is simple: since the early 1970s, CALSPro and its predecessor organization CAPPS, has been the voice of process servers and photocopiers

in Sacramento, *the only organization exclusively dedicated to representing this crucial portion of the legal community.*

The return of the legislature to Sacramento on Monday, January 5, will begin the 2026 legislative year, the second year of the 2025-2026 two-year session. Every year, some 2000-2500 bills are introduced, and these bills are typically amended 4-6 times before they are passed or killed. This means some 12 to 15 *thousand* opportunities to propose something affecting CALSPro members. Every bill, and every amendment to each bill, is read and evaluated for potential impact on our industry. And sometimes when bills are amended, they move fast, requiring immediate action. For his part, Legislative Chair Chad Barger is always, always available on short notice to offer advice and mobilize his committee into action.

The simple truth is that while the United States President and Congress "get the ink," the state legislature impacts the process serving and photocopy industries far more than the federal government. CALSPro relies on the support, engagement, judgment and expertise of those who make a living from the legal support industry to protect this critical component of the judicial process. It has worked for over 50 years.

On to 2026! ●



Legislative Update

CHAD BARGER, CALSPro Legislative Chair

Can you believe it's already 2026? Time truly flies when you're building momentum. This past year marked a pivotal moment for our profession with the introduction of Assembly Bill 747. Through tireless effort and unwavering advocacy, your legislative committee and our partners successfully transformed what began as potentially devastating legislation into a workable framework for our industry. As we move into 2026, we will begin implementing the policies and procedures necessary to ensure compliance with AB 747 ahead of its January 1, 2027, effective date. Just as we have since our founding in 1969, your legislative team remains steadfast in its commitment to protecting, advancing, and strengthening our profession.

Each year, the Legislative Chair appoints a dedicated group of professionals to serve on the committee. The 2026 Legislative Committee members are Andy Estin, Tony Klein, Jeff Karotkin, Dan Mora (Photocopy), Jeremiah Jones (Vice-President), and Jackie Janney (President). I am also pleased that Kristian Pujol has once again agreed to serve as Co-Chair. Alongside our experienced advocates, Mike Belote and Cliff Costa, this accomplished team stands united and well-prepared to vigorously defend our interests and lead our industry forward.

At our December meeting, the Board of Directors and the Legislative Committee

came together for a focused and productive discussion on the key challenges currently facing our members and the most effective paths toward resolution. The group also evaluated potential new legislation, including both the substance of proposed bills and the most strategic approach for advancing them. Following thoughtful deliberation, the committee presented the following initiatives to the Board for approval:

1. Authorization to submit clean-up language for Assembly Bill 747 through future legislation.
2. Continued exploration of a statewide registration framework for process servers and professional photocopiers, potentially administered through the California State Bar or another appropriate agency.
3. Evaluation of opportunities to modernize the use of electronic signatures on proofs of service and affidavits for process servers.
4. Examination of service of process challenges in secured commercial buildings, with consideration of potential legislative solutions.

Proposed Clean-Up Language for Assembly Bill 747:

Clean-Up Amendment 1: Making attachments optional (we missed this subparagraph in CCP 714.10)

SEC. 9. Section 417.10 is added to the Code of Civil Procedure, to read:

417.10. Proof that a summons was served on a person within this state shall be made:

(4) Notwithstanding paragraph (1), a photograph is not required if, in the reasonable judgment of the process server, taking a photograph would compromise the process server's safety. In such circumstances, the process server shall document the effected or attempted service on or with the proof of service and provide a detailed statement explaining why taking a photograph would have compromised their safety.

Clean-Up Amendment 2: Revising the phrase "or otherwise"

SEC. 14. Section 473.2 is added to the Code of Civil Procedure, to read:

473.2. (a) A party that was not served with a summons and complaint in accordance with this chapter may file and serve a motion to set aside or vacate the default or default judgment and for leave to defend the action or to move for dismissal.

(b) (1) A party moving to set aside or vacate a default or a default judgment pursuant to subdivision (a) shall proffer evidence, through a sworn affidavit or otherwise, that service was not lawfully effected.

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Proffering evidence that service was not lawfully effected rebuts a presumption of the facts stated in the process server's return.

We would like to collaborate with the authors and sponsor of AB 747 to develop clarifying language that is more precise than the phrase "or otherwise."

Statewide Registration for Process Servers and Professional Photocopiers:

When Assembly Bill 747 was first introduced, it proposed a county-by-county registration scheme that would have required every process server and process server agency to register separately in each county where they conduct business. For CALSPro, this was a non-starter. Such a system would have placed a significant and unnecessary financial burden on individual process servers and agencies alike.

In response, we moved swiftly into negotiations to have this provision removed from the bill. As part of that effort, we agreed to continue exploring the feasibility of a streamlined, statewide registration model – potentially administered through the California State Bar or another appropriate agency – with the goal of developing a more efficient and cost-effective system for future implementation.

Evaluation of Opportunities to Modernize Electronic Signatures:

In today's increasingly electronic court environment, electronic signatures – or eSignatures – are becoming more common on proofs of service and affidavits. CALSPro is proactively exploring ways to streamline this process while maintaining the highest standards of security, accuracy, and reliability.

When considered alongside the new requirements of AB 747, including geotagged photographs and the submission of a process server's electronic service information, the path toward thoughtful modernization becomes even clearer. These tools may allow our

industry to embrace innovation without compromising integrity. As this discussion continues to evolve, we will keep you informed on developments in this exciting and forward-looking initiative.

Examination of Service of Process Challenges in Secured Commercial Buildings:

We are exploring potential legislation that would add a new section to the California Code of Civil Procedure to establish clear, uniform standards for service of process in secured commercial buildings. These are locations where access to tenants or registered agents is often restricted by security personnel, concierge staff, receptionists, electronic access controls, or similar gatekeepers. The goal of this proposal is to bring clarity, consistency, and fairness to service attempts in these increasingly common environments. Specifically, the proposed legislation would aim to:

1. Ensure lawful and reasonable access for process servers to publicly registered business addresses on file with the Secretary of State and designated for the appointment of agents for service of process.
2. Prevent obstruction, whether intentional or unintentional, by security staff or reception personnel who delay, deny, or divert lawful service attempts.
3. Clarify that access-control personnel may be deemed the "person apparently in charge" when they refuse reasonable access, thereby allowing substituted service to be completed lawfully and efficiently.
4. Establish uniform statewide standards governing the service of summonses, subpoenas, and notices in buildings with restricted entry.
5. Modernize service-of-process practices by aligning this framework with CCP §1162 (unlawful detainer notices), CCP §415.20 (substituted service), and the policy intent of AB 747 regarding transparency and accessibility in service.

This effort reflects our continued commitment to protecting the ability of process servers to perform their essential duties effectively in a changing legal and physical landscape.

New California Legislation 2026–2027:

As thousands of bills flood into the state legislature each year, our vigilant team is on high alert! The deadline for bill introductions is mid-February 2026. Post-deadline, our dedicated advocates and legislative committee will spring into action, identifying bills with potential impacts on our industry and engaging with their sponsors. We've already pinpointed several key bills and are committed to staying on top of any new developments.

Stay informed and check out our active legislation tracker to see which bills we're monitoring this session ([CLICK HERE](#)).

New Laws for 2026:

Each year, hundreds of new laws take effect across our great state. Below is a link to a trusted news source highlighting several of the new laws that may impact our industry and members. ([New California Laws 2026](#))

In closing, I extend my sincere gratitude to our committee members, Board of Directors, and the entire membership for their continued support, trust, and commitment to protecting and advancing our profession. Your dedication makes our work possible and gives strength to our collective voice. Advocacy and legislation have always been – and will remain – the foundation of CALSPro, and it is truly an honor to be part of an organization so deeply committed to its mission and to the professionals it represents. 🙏

Sincerely,



Chad Barger
Committee Chair



Membership Update

MATT JANNEY, **CALSPro Membership Chair**

This past year was a strong and encouraging one for CALSPro. We experienced growth in both membership and participation, a clear sign that our association continues to resonate with professionals throughout the legal support community. It has been exciting to see more individuals engage with CALSPro and take an active role in our programs, events, and initiatives.

As we look ahead to 2026, it is shaping up to be a pivotal year for our association. I have already received several emails and

phone calls asking about the value of CALSPro membership. While explaining the importance of legislative advocacy can sometimes be challenging – especially to those new to the industry – it remains one of our most critical functions. CALSPro has a long history of advocating for and protecting the interests of process servers and legal support professionals, and many in our field are still unaware of the work we do and the impact we’ve made.

In the coming year, we will be making a focused effort to reach those professionals. By leveraging county databases, we plan to connect with process servers across the state and share CALSPro’s mission, accomplishments, and vital role within our industry. If you are interested in helping with these efforts or have ideas on how we can continue to grow and strengthen our membership, we encourage you to reach out. Your input is always welcome, and we look forward to working together to make 2026 a standout year for CALSPro. 🌐





I specialize in commercial insurance solutions in the areas of:

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- Commercial Auto
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- Cyber Liability
- Reps and Warranty Policies for M&A Transactions
- Commercial Property
- General Liability
- Products Liability
- Directors' and Officers' Liability
- Medical Malpractice

I also have experience in self-insurance programs, high deductible retention programs and the use of captives as a means of risk financing, asset preservation and wealth management.



Larry Sukay – CALSPro Member

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Continuing Education Report

JEREMIAH JONES, **CALSPro Education Chair**

Legislative Awareness, Recruitment, and New CCPS Presenters

The Continuing Education Committee continues to prioritize the quality and relevance of CALSPro’s educational offerings, including recent updates to CCPS materials designed to keep members apprised of the changes taking place under AB 747. We are also expanding recruitment opportunities and growing our team of presenters to better serve the needs of our members.

CCPS Curriculum Planning and AB 747

As we prepare for our CCPS workshops in 2026, the committee has begun making updates to the CCPS curriculum, including the development of an AB 747 Addendum that will outline the legislative changes scheduled to take effect in 2027.

CALSPro Connect Recruitment Events

Following our pilot earlier this year, CALSPro Connect recruitment events will continue in conjunction with each CCPS workshop throughout 2026. These events are designed to link education with employment by connecting aspiring process servers with companies that value training and professionalism.

Key updates to the program include:

- Hosting a recruitment event in conjunction with every CCPS workshop in 2026
- Charging a minimal participation fee (\$25-\$50) for companies that wish to take part
- Offering an optional paid upgrade for companies that want to submit promotional or advertising videos
- Reducing the time commitment required for participating companies to make it easier to participate
- Adjusting event flow and communication based on pilot feedback to improve engagement for both attendees and companies

These refinements are intended to make the recruitment events more sustainable, more accessible, and more effective for everyone involved.

Expanding the CCPS Presenter Pool

To support long term sustainability and bring fresh perspectives to our workshops, we are expanding from two presenters to a four-person presenter pool for the CCPS program.

Our rotating presenters this year are:

- **Jonathan Schisler**
(CALSPro CE Committee Co-Chair)
- **Jackie Janney**
(CALSPro President)
- **Krystalyn Souza**
- **Kristin Pujol**
(CALSPro Immediate Past President)

This rotation improves coverage for workshop dates, reduces the strain on any single presenter, and allows attendees to benefit from a wider range of experience and teaching styles.

2026 CCPS Workshop and CALSPro Connect Recruitment Schedule

Looking ahead, the following dates are set for the 2026 CCPS workshops and corresponding CALSPro Connect recruitment events:

- **Thursday, February 12**
(Lincoln’s Birthday)
- **Saturday, April 11**
- **Friday, June 19**
(Juneteenth)
- **Saturday, August 8**

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Conference Update

FRANK SMITHSON, **CALSPro Conference Chair**

SAVE THE DATE: CALSPro 2026 Annual Conference Heads to Old Sacramento!

I am thrilled to announce that the California Association of Legal Support Professionals (CALSPro) has officially selected the venue for our 2026 Annual Conference. We will be gathering at the historic Embassy Suites in Old Sacramento! Please mark your calendars for October 9–11, 2026 (Indigenous Peoples’ Day Weekend).

Why Sacramento?

In planning this event, we took a hard look at our history. While our policies suggest rotating between Northern and Southern California, our recent research revealed a vital insight: geography does not dictate our turnout – legislative action does. Our members are driven by the issues that impact our livelihood. The energy we

saw regarding AB747 in Long Beach was proof that when we focus on legislative transparency and advocacy – a key purpose of our Association – our community shows up in full force.

A Commitment to Exceptional Education

Beyond advocacy, we know that high-quality education is a major draw for our members. The Annual Conference is one of our four vital “Cornerstones,” and we intend to build on the successes of our recent gatherings. The feedback from our last conference was clear: you value deep dives into complex topics. From panels on cross-state jurisdiction to navigating the future of AI, our members want to stay ahead of the curve. We are committed to

curating a 2026 agenda that meets that same standard of excellence, fulfilling our charter to provide networking, legislative review, and continuing education.

Call for Committee Members

We are forming the Conference Committee and are seeking passionate members to help shape this event. Whether you have expertise in technology, legislation, or want to help plan a great experience, we welcome your involvement. If you are interested in joining the team that will bring the 2026 conference to life, don’t hesitate to get in touch with me directly.

Frank Smithson Conference Chair email: fsmithson@gemini.legal





Advertising Report

STEPHEN RAHEB, **CALSPro Advertising Chair**

As we look ahead to an exciting year for CALSPro, I'm thrilled to share new advertising opportunities now available through our association!

In collaboration with the CALSPro Connect Community, we are launching a powerful



platform for agencies and vendors to connect with qualified process servers across the state and beyond. Our job listing board will now offer targeted visibility within our network, helping streamline recruitment and highlight meaningful opportunities in our profession.

We're also joining forces with the Social Media Committee and Connect Committee to maximize exposure through cross-channel promotions, spanning our newsletter, social platforms, and CALSPro digital events.

Lastly, we will be hosting Best Practices Roundtables, creating space for shared insights and dialogue around recruitment, service of process trends, and the evolving needs of legal support professionals.

If you're looking to advertise your services, job openings, or company offerings to the CALSPro network, now is the perfect time to get involved. Stay tuned for advertising packages and pricing in our next issue!

Let's connect, collaborate, and grow together. ●



Looking to share job postings or industry specific equipment sales? Look no further than the CALSPro Classifieds.

Listings start at just \$30 per month!

[Check out our CURRENT LISTINGS](#)

Ready to get started? It's easy!

[CLICK HERE](#) and sign up today

Introducing



CALSPro

CONNECT

Access • Educate • Collaborate

Where Community Builds Oppor





DENNIS BARBER
**United Legal Support
CALSPRO Board Member**

Opportunity

In every profession, connection is the heartbeat of progress – and for California’s legal support community, that connection begins here. **CALSPRO Connect** is a new initiative from the California Association of Legal Support Professionals designed to unite our members, strengthen collaboration, and create meaningful opportunities for growth, education, and shared success.

CALSPRO Connect is more than a program – it is a community within our association. It brings together process servers, photocopiers, court runners, and legal support business owners from across the state to exchange ideas, share resources, and build stronger professional relationships. It is where experience meets innovation and where members come together to support one another.

Through recruitment outreach, job matching, agency collaboration, and open roundtable discussions, **CALSPRO Connect** offers a place to share challenges, explore solutions, and learn best practices that strengthen our entire profession. These

conversations help bridge experience levels, promote collaboration, and foster a sense of community among agency owners, independent contractors, and staff.

But **CALSPRO Connect** is not just about business – it is about belonging. Digital recruitment events, virtual job fairs, collaboration labs, and member spotlights highlight the people who make CALSPRO strong. Educational workshops and mentorship opportunities further support professional growth and reinforce the values that define our association.

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“
When we collaborate, we don't just strengthen our businesses – we strengthen our profession.
”

CALSPRO Connect continues to expand with new opportunities for member engagement. Our centralized recruitment platform enables agencies to post positions,

find qualified candidates, and build long-term partnerships. At the same time, spotlight features celebrate achievement, innovation, and leadership across our community – reminding us that we grow strongest when we grow together.

Whether you are looking to hire, learn, mentor, or connect more deeply with your peers, CALSPRO Connect is your platform – your voice, your network, your community.

Together, we are not just connecting professionals – we are building the future of California's legal support industry. ●

Continuing Education

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- **Saturday in September at the CALSPRO Conference**
(exact date/location to be announced)
- **Wednesday, November 11**
(Veterans Day)

We encourage members to share these dates with newer staff, prospective servers, and anyone preparing for certification.

Recognizing Newly Certified CCPS Professionals

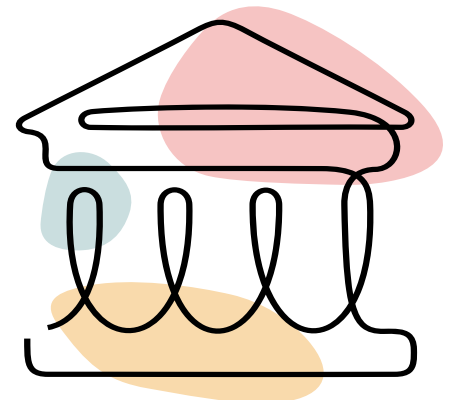
One of the most rewarding parts of this work is welcoming newly certified CCPS professionals. From our most recent course, please join me in congratulating the following individuals who successfully achieved the CCPS designation:

- **Tim Tom**
- **Rosibel Fuentes**
- **Mike Orly Alope**
- **Maria Sandoval**
- **Adam Sherman**

Their commitment to professionalism and education strengthens CALSPRO and the broader process serving community.

The Continuing Education Committee remains committed to delivering relevant, engaging, and practical educational resources that support the growth and preparedness of California process servers. Thank you for your continued support as we navigate legislative changes, refine our curriculum, and expand opportunities for training and recruitment. ●

Jeremiah Jones
Continuing Education Chair



PROCESS SERVER WORKSHOP + RECRUITMENT EVENT

Connecting process serving agencies with independent process servers

FEB 12, 2026
9:00AM

REGISTER TODAY

www.calsprou.org



- Interactive Certified California Process Server (CCPS) workshop with updated course materials
- Overview of upcoming California law changes effective 2027, following the passage of **AB 747**
- Engaging presenters, with real-world process serving experience
- Opportunity for process servers to connect directly with process serving agencies

Why California Process Servers Should Consider Adding Directors and Officers Insurance



LARRY SUKAY, CCPS
Falcon West



Process servers are the backbone of the legal system, ensuring that individuals and businesses receive critical legal documents in a timely and professional manner. Given the complexity and liability risks involved, many process servers already carry General Liability (GL) and Professional Liability Insurance, commonly known as Errors & Omissions (E&O) insurance. These policies are crucial, protecting businesses from claims related to negligence or mistakes made in the service of legal documents.

However, process servers – particularly those running or managing a company – may still be exposed to significant personal risk that GL and E&O insurance do not cover. That’s where Directors and Officers (D&O) insurance comes in. Here’s why process servers in California should consider adding D&O insurance to their coverage portfolio.

Protection Against Management Liability

D&O insurance covers claims arising from decisions made by directors and officers in their managerial roles. If a process server business has a formal leadership structure, even if it’s a small company, its leaders can be held personally liable for decisions made on behalf of the company. This could include all egations of mismanagement, failure to comply with regulations, or decisions that negatively impact clients, employees, or third parties.

Without D&O coverage, directors and officers may face lawsuits where their personal assets, such as savings, property, or investments, are at risk.

Shielding Personal Assets

Process servers who serve as directors or officers in their companies may assume that their E&O or GL policies will protect them from all business-related liabilities. While these policies are essential, they do not protect against claims related to how the business is managed.

If, for example, a competitor accuses your company of unfair competition or a former employee sues for wrongful termination, these are not covered by GL or E&O insurance. D&O insurance steps in to protect your personal assets against such claims, which could otherwise result in out-of-pocket expenses for legal defense, settlements, or judgments.

Compliance with Regulatory Requirements

As a process server, compliance with state and federal regulations is critical. Failing to stay in line with California’s legal requirements for process serving, employment law, or corporate governance can result in fines, penalties, or lawsuits.

D&O insurance provides coverage if directors or officers are accused of

violating regulation or misrepresenting the company’s compliance status. With California’s complex regulatory landscape, this coverage adds an important layer of security.

Attracting and Retaining Leadership

If your process-serving business is growing or seeking to bring on new leadership, D&O insurance can be a powerful tool for attracting qualified candidates to your executive team. High-caliber professionals will be more inclined to join or stay with a company if they know their personal assets are protected from claims related to the company’s governance.

This protection is especially important for businesses looking to expand or increase their client base, where strategic decisions are crucial but carry risk.

Coverage for a Range of Risks

D&O insurance is not just for large corporations. It provides critical protection for small to mid-sized businesses, particularly in industries like process serving, where mistakes or decisions can have serious legal implications. Potential claims could arise from:

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- Misrepresentation of company financial health or performance
- Breaches of fiduciary duty
- Discrimination or harassment claims
- Failure to comply with employment laws or other regulations

While GL and E&O insurance protect against operational risks and errors in professional services, D&O insurance covers the broader scope of management decisions.

The High Cost of Legal Defense

Even if a claim against a director or officer is unfounded, the cost of defending against a lawsuit can be substantial. Legal fees, court costs, and settlement negotiations can drain company resources, and without D&O coverage, directors and officers might

have to bear these costs personally. D&O insurance provides financial protection, covering the cost of legal defense and reducing the impact on both personal finances and company funds.

Conclusion

General Liability and Professional Liability (E&O) insurance are essential for any process server, as they provide protection from everyday risks inherent in the profession. However, if you or your team are making high-level business decisions, managing employees, or navigating complex regulations, Directors and Officers insurance is a crucial supplement to your existing coverage. It ensures that your personal assets and your business are safeguarded against management-related risks that other policies don't cover, giving you peace of mind as you focus on growing your business. 🗣️





MEMBER SPOTLIGHT:

Andrew R. Estin



MICHAEL KERN
Direct Legal Support

Andrew R. “Andy” Estin became a leader in the process-serving industry at a remarkably early age. After serving thirteen months in Vietnam as a United States Marine – earning the rank of Sergeant in his early twenties – Andy transitioned into civilian life with the same discipline and sense of service that would define his professional legacy.

Andy’s career in legal support began in 1969 with Alex Rifkind Attorney Service in Los Angeles, a pivotal year for the profession. That same year marked the formation of the California Association of Photocopiers and Process Servers – now known as **California Association of Legal Support Professionals** – and the enactment of the nation’s first law requiring the registration of process servers. Amid growing legislative scrutiny and rapid industry change, Andy quickly emerged as a trusted leader. In 1973, CALSPro members elected him President, and over the next



twenty-seven years he served in numerous leadership roles, including extended service on the Board of Directors.

Andy’s impact expanded nationally in 1982 following a critical discovery by CALSPro member Thomas Bowman Jr., who identified a proposed amendment to Rule 4 of the Federal Rules of Civil Procedure that would have permitted service by mail. Recognizing the serious threat this posed

to the profession, Bowman and fellow CALSPro members alerted Andy. That moment planted the seed for the creation of **National Association of Professional Process Servers**. Andy Estin and Tom Bowman took the lead in organizing the fledgling association, successfully advocating for amendments that aligned federal service rules with California’s notice and acknowledgment procedures – averting what many viewed as a looming disaster for the industry.

Andy was one of the forty-two process servers who attended the historic October 1982 founding meeting of NAPPS in Las Vegas. He was subsequently elected as the organization’s founding president and has since served multiple terms as an officer and director. Widely regarded as a treasured resource, Andy is known for his strategic insight and deep legislative knowledge.

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He has testified before the Washington Legislature, as well as the California Senate and Assembly Judiciary Committees, and has assisted state associations in Texas, Arizona, and Pennsylvania in both opposing harmful legislation and drafting effective licensing laws.

CALSPRO honored Andy's extraordinary service with the prestigious Bert Rosenthal Memorial Award in 1980, recognizing individuals who demonstrate exceptional dedication to advancing the process-serving profession. In 2007, Andy again played a key role in guiding the organization's strategic transition from CAPPs to CALSPRO, better reflecting the expanding scope of legal-support services and strengthening the association's legislative effectiveness in Sacramento. In 2002, NAPPs further recognized Andy's legacy by naming him the third recipient of the Donald C. "Mac" MacDonald Award for Professionalism and Distinguished Service – one of the association's highest honors.

Now retired in Los Angeles, Andrew R. Estin continues to mentor professionals across the industry, generously sharing decades of experience and institutional knowledge. He remains a registered process server in

Los Angeles County, and it is fitting that his assigned registration is **Number One** – a distinction that perfectly reflects his pioneering role, enduring leadership, and lasting impact on the profession. 🌟



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