Elevating Expectations.

“A standard by which all other service providers are measured.” - Elizabeth M, Boston

“I really appreciate Capitol Services’ customer service - y’all are amazing.” - Kristen F, Portland

“I haven’t received such superior customer service from a company in years.” - Lilia L, Houston

Capitol Services sets out to be what other industry service companies aren’t. We invest in and value our family of employees, and we feel this is ultimately the reason why legal and corporate professionals like you choose us over our competition. Our service teams aren’t just willing, but wanting to exceed your expectations. We want to earn your business each and every day, one transaction at a time.

When you’re ready to change your expectations of a service company, we’re ready to work for you.
Time marches on. And on. As we come to the close of our fiscal year, can you look back over the past 12 months and see that you have progressed? Slid back a few steps? Made a lateral move? What are your plans for this next year? I hope they include taking time for rejuvenation, for reconnecting.

I recently found my very best friend from junior high and high school. Our birthdays are three days apart, and, although we haven’t lived near each other since right after graduation, every year in mid-October, we would have a long gab fest over the phone to celebrate us and our friendship.

Then life sort of got in the way. Husbands, babies, jobs, stuff—seems as though girl time was something that had to wait. Then I moved. Then she remarried. Then I remarried and moved again. We just lost touch. Thanks to LinkedIn, I found her again, when I wasn’t even looking. Our kiddos are all grown and have children of their own. In her words, “Thank goodness I raised eagles instead of homing pigeons!”

And that is as it should be. Home is important, and I would never try to minimize that. But, let’s face it—we aren’t kids any more. It’s time to stand up and face the future, knowing that all those people you love are standing behind you, encouraging you, loving you, cheering you on.

Have you ever thought about stepping up to get more involved in the Paralegal Division, perhaps as a sub-chair? As the new year gets underway, our Directors all need help. If you don’t feel that you have time to be a sub-chair, or maybe you’re just not sure that’s what you want, how about helping with one project? Maybe you can put together a CLE in your own town that’s far from the hub where everything seems to take place. Or volunteer to help with a members-only social one evening after work.

My final message as President is to encourage you to be more, to do more, to reconnect. If you can’t reconnect with a childhood friend, then at least get connected with yourself. Figure out what it is that makes you truly happy and satisfied. Explore your possibilities. Spread your wings and soar like the eagle you are.

Mona H. Tucker, ACP

PD provides many benefits for career growth:

• Networking with paralegals across the state
• Powerful CLE opportunities such as Texas Advanced Paralegal Seminar (TAPS)
• Professional Development
• Professional magazine with substantive articles and updates from across the nation

THINK ABOUT IT......

an organization designed just for YOU! ENHANCE YOUR CAREER by becoming a part of PD today.

Go to www.txpd.org and see for yourself or contact the PD Coordinator via email at pd@txpd.org or call (806) 443-2209
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EDITOR’S NOTE

TAPS is on everyone’s mind this time of year! You do not want to miss the 2018 TAPS brochure, starting on page 17. Registration is now open and we hope to see you there!

In this edition, Mona Hart Tucker’s gives her last “President’s Message.” Also, see the “100 PD Club” section that lists firms that had 100% PD membership enrollment this term.

Membership renewals end July 31st. You should have received a blue postcard in the mail in May reminding you to renew and that YOU WILL NEED 1 HOUR OF ETHICS as part of your required 6 CLE hours.

Are you looking for your new membership card? Just a reminder that last year was the final year for distributing renewal membership cards. Be sure to hang on to your traditional burgundy PD membership card!

This will be the Paralegal Division’s second full year of a digital-only format of the Texas Paralegal Journal. There are so many features that we hope you have tried and enjoyed and there are still some we are still trying to explore.

Thank you for being a PD member!

By Megan Goor, TBLS-BCP, Editor, Texas Paralegal Journal e-mail: tpj@txpd.org

Thank You
Sustaining Members!

The Paralegal Division would like to thank the vendors and/or sustaining members who advertised with us during the 2017–2018 term:

- Capitol Services
- Hollerbach & Associates
- The National Academy of Distinguished Neutrals
- Veritext Legal Solutions
- FileTime

The Paralegal Division would also like to thank all of our sustaining members for their membership and support during the 2017–2018 term.

Please see the full list here.
Join PD and reap the benefits!

Below is a highlight of a few of the benefits that can make your membership invaluable.

» **E-Group Forum:** Join the members-only forum with hot topics, forms, ethics, and general questions posted and answered by paralegals. The eGroup is a way for members to share information and to obtain input to help address questions. Say you have a question and think the group would be a good resource; you could send your question to the eGroup. In a matter of minutes, you can have an answer to your question, a fresh idea about the matter, or a lead in the right direction. The amount of time that you can save with the eGroup is worth the cost of membership alone.

» **CLE:** The Paralegal Division provides many opportunities to obtain CLE. Every year the Paralegal Division sponsors the Texas Advanced Paralegal Seminar (TAPS), a 3-day CLE seminar where you can obtain up to 14 hours of CLE for one low great price. A majority of the topics are TBLS approved for those board certified paralegals. If you are not able to attend TAPS, the Paralegal Division provides other opportunities by providing at least 3 hours of CLE in your district and online CLE. The Paralegal Division has over 60 different CLE topics available online for those paralegals that are not able to attend CLE outside of the office. You can obtain your CLE hours while at your computer.

» **Mentor Program:** The mentor program is available to all members of the Paralegal Division. The purpose of this program is to provide support on topics such as ethics, career advancement, professionalism, and the Division. Mentors will provide support, guidance, and direction to new paralegals that will strengthen their links to the paralegal community, and contribute to their success as a paralegal. Protégés also have access to valuable networking opportunities with other paralegals and the legal community through their mentor, as well as at state-wide and district Paralegal Division events.

Membership criteria and additional member benefits can be found at [www.txpd.org](http://www.txpd.org) under “Membership” tab. All applications are accepted and processed online at [www.txpd.org/apply](http://www.txpd.org/apply). Dues payment accepted by check, money order or credit card. Questions regarding membership in the Paralegal Division can be forwarded to pd@txpd.org or memberchair@txpd.org.
Focus on...

Proving and Protecting Separate Property in Divorce

By Aaron M. Reimer

I. INTRODUCTION
Throughout a marriage, spouses earn income, acquire and dispose of assets, inherit property, and incur liabilities, which leads to the creation of the spouses’ marital estate. The marital estate is defined as all of the spouses’ assets and liabilities, and includes community and separate property. Whether you are handling your first divorce case or you are a seasoned family law practitioner, there are three critical steps in every case involving marital property: (1) Identify; (2) Characterize; and (3) Value.

When a Court enters a final decree of divorce, the court must dispose of all the spouses’ property issues including dividing the parties’ community estate, and confirming each party’s separate property. See Tex. Fam. Code § 7.001. Community property is all property that is not separate property. See Tex. Fam. Code § 3.002. Separate property is all property acquired prior to the marriage, and property acquired during the marriage through gift, devise, descent, or recovery for personal injury, except recovery for loss of earning capacity. See Tex. Fam. Code § 3.001. Any property that is not divided or confirmed in a final decree of divorce remains subject to a future division by the court. See Tex. Fam. Code § 9.201 et seq.

The issue of characterization of the parties’ property in the marital estate arises when a party claims a certain piece of property as their separate property. Absent an agreement from the other spouse, characterizing the property claimed as separate is necessary. In dividing the community property, a trial court has broad discretion, and will be reversed only if the trial court abuses that discretion. Murf v. Murf, 615 S.W.2d 696, 698 (Tex. 1981). For family law practitioners, it is important to understand how to characterize property of the parties’ marital estate because the failure to correctly and adequately characterize an asset or liability may lead to divestment of a spouse’s constitutionally protected separate property or to a division of the community estate that is neither just nor right.

II. CHARACTERIZATION
Characterization refers to the process of rebutting the community property presumption, and identifying a spouse’s property as separate. Under the Texas Family Code, all property possessed by either spouse at the time of divorce is presumed to be community. Tex. Fam. Code § 3.003(a). Only through clear and convincing evidence may a spouse rebut the community property presumption, and establish, or characterize, a spouse’s property as separate. Tex. Fam. Code § 3.003(b). Therefore, characterization is
the presentation of clear and convincing evidence to rebut the community property presumption.

Since the community property presumption may only be rebutted through clear and convincing evidence, the presumption acts as a shield for a spouse who wishes to preserve the assets in the community property estate for when a court makes a just and right division of the marital estate. A spouse claiming that community property comprises the entirety of the marital estate is not required to produce evidence supporting such a claim. See Tex. Fam. Code § 3.003 (a). While all community property is subject to a just and right division, the court may not divest either spouse of his or her separate property. See Tex. Fam. Code §§ 7.001, 7.002. A court may only confirm the property as a spouse’s separate property, whereas, a court may make just and right division of the marital estate, and a party’s ownership interest in property, the community property presumption may be viewed as a shield, or an obstacle to overcome.

1. Time and Manner of Acquisition
When beginning a characterization analysis the two most important issues to be resolved are: 1) time of acquisition, and 2) manner of acquisition. Determining the date the party acquired the property to be characterized is necessary because separate property includes all property acquired prior to the marriage. See Tex. Fam. Code § 6 3.001. For property acquired during the marriage, the manner of the acquisition of the property is significant because property acquired by a spouse during the marriage by gift, devise, descent, or for recovery of personal injuries, except for the portion of the funds recovered for loss of earning capacity is a spouse’s separate property. See Tex. Fam. Code § 3.001. Similarly, property acquired during the marriage with a spouse’s separate property is also a spouse’s separate property. Failure to determine the time and manner of the acquisition may result in the property being presumed to be community property. See Tex. Fam. Code § 6 3.002.

A. Inception of Title
Generally, the process of characterizing marital property begins with the doctrine of inception title. Under the doctrine of inception title, the character of property is determined by the time and manner, or by when and how, a spouse first acquired an ownership interest in the property. See Jensen v. Jensen, 665 S.W.2d 107, 109 (Tex. 1984); Creamer v. Briscoe, 109 S.W. 911, 913 (Tex. 1908). If a spouse acquired an ownership interest in property prior to the marriage, then the property is separate property under the doctrine of inception of title. See Tex. Fam. Code § 6 3.001, 3.002. In contrast, if a spouse acquired an ownership interest in property during the marriage, then the property is presumed to be community property. Id. However, the doctrine of inception of title provides that the manner in which the spouse acquired the property may result in the characterization of the property as separate. See Jensen, 665 S.W.2d at 109.

B. Mutation
The character of the property, established under the doctrine of inception of title, will not change because of mutations in the nature of the property so long as the property can be clearly identified and traced. See Chapman v. Allen, 15 Tex. 278, 283 (1855). Once determined, the character of the property is not altered by the sale, exchange or substitution of the property. Norris v. Vaughn, 260 S.W.2d 676, 679 (Tex. 1953); Horlock v. Horlock, 533 S.W.2d 52, 60 (Tex. Civ.App.—Houston [14th Dist.] 1975, writ dism.). Property established to be separate remains separate property regardless of the fact that it may undergo any number of mutations and changes in form. Id. Therefore, clearly identified mutations of property identified as separate property through the doctrine of inception of title may lead to the rebuttal of the community property presumption.

In Norris, in was undisputed that Husband law firm partnership interest was awarded to him as his separate property in a prior divorce and belonged to him long before his second marriage. During the marriage, however, Husband executed a second partnership agreement which altered and controlled the terms of his withdrawal from the law firm. At trial, wife argued unsuccessfully at trial that the partnership interest owned by Husband at the date of divorce was different from the partnership interest owned by Husband on the date of marriage. The court held that while the value of Husband’s separate property interest in the partnership may have fluctuated from time to time, there was no evidence that any “additional” interest was acquired during the parties’ marriage. As in the case of stock splits and increases, analogous to this situation involving “units” of a partnership, mutations and increases in separate property
remain separate property. See also Horlock v. Horlock, 533 S.W.2d 52, 60 (Tex.Civ. App.—Houston [14th Dist.] 1975, writ dism.).

In Legrand-Brock v. Brock, the parties stipulated that the BTH Holdings, Inc., stock was Husband’s separate property, 246 S.W.3d 318 (Tex. App.—Beaumont 2008, pet. denied). During the marriage, BTH’s board of directors, with the unanimous consent of the stockholders, passed a resolution to dissolve BTH, liquidate its assets, and distribute the assets pursuant to a plan of liquidation. The plan of liquidation required the officers of the corporation to pay all of BTH’s current outstanding liabilities, debts, and obligations. All remaining corporate assets would then be distributed pro rata to the shareholders in complete cancellation or redemption of all the shares of capital stock. Husband received approximately $7,000,000 in distributions. Generally, when a spouse owns separate-property stock in a dissolving corporation and receives distributions of liquidated assets, the distributions remain the stockholder’s separate property. See Fuhrman v. Fuhrman, 302 S.W.2d 205, 212 (Tex.Civ.App.—El Paso 1957, writ dism’d) (holding that stock received in liquidation of a corporation in which husband owned separate stock was husband’s separate property); Wells v. Hiskett, 288 S.W.2d 257, 265 (Tex.Civ.App.—Texarkana 1956, writ ref’d n.r.e.) (holding that because stockholder received a liquidating distribution in the form of an oil and gas lease in consideration of the cancellation of the stock held in a dissolving corporation, the lease remained stockholder’s separate property as a matter of law). Wife’s accountant testified that the cash distributions were paid from retained earnings, were liquidating dividends, and should be characterized as community property. The trial court found that the distributions were not dividends. The court ruled that Husband had received liquidating distributions pursuant to the dissolution of BTH, and the distributions were in redemption or cancellation of his separate property stock. The character of property is not altered by the sale, substitution, or exchange of the property; separate property that merely undergoes mutations or changes in form remains separate property. Harris v. Harris, 765 S.W.2d 798, 802 (Tex. App.—Houston [14th Dist.] 1989, writ denied). Distributions received in exchange for the cancellation of stock upon the corporation’s dissolution retain the character of the stock. See Wells, 288 S.W.2d at 265.

C. Commingling

Even when there is indisputable evidence that a spouse has contributed his or her separate property during the marriage, the spouse may not be able to satisfy the “clear and convincing evidence” burden the separate property and community property have been commingled. If the evidence shows separate and community property have become so commingled as to defy resegregation and identification, the burden is not discharged and the statutory community property presumption prevails. McKinley v. McKinley, 496 S.W.2d 540, 543 (Tex. 1973). Mere testimony that property was purchased with separate property funds, without any tracing of the funds, is generally insufficient to rebut the community property presumption. McElwee v. McElwee, 911 S.W.2d 182, 188 (Tex. App.—Houston [1st Dist.] 1995, writ denied) (quoting Schmetz v. Garey, 49 Tex. 49, 60–61 (Tex. 1878)).

In Zagorski, Husband relied on the inception of title doctrine to establish that a financial account owned by him prior to the marriage was his separate property. Zagorski v. Zagorski, 116 S.W.3d 309, 317 (Tex. App.—Houston [14th Dist.] 2003, pet. denied). Wife argued that the account was hopelessly commingled with community property and defied resegregation because interest, representing community income, was paid into it. Husband introduced an exhibit showing less than $115,000 in interest was earned during the marriage. Another exhibit shows approximately $366,000 was withdrawn for marital living expenses. Wife did not rebut the community-out-first presumption. Because the withdrawals for community expenses depleted the community funds in the account, the account remained Husband’s separate account. Husband’s tracing of the community funds into and out of the account rebutted the statutory presumption the account was a community asset. See also Smith v. Smith, 22 S.W.3d 140, 147 (Tex. App.—Houston [14th Dist.] 2000, no pet.) (holding under application of community-out-first presumption, where withdrawals from an account deplete community funds in the account, it is error to award any portion of the remaining separate property funds to other spouse).

III. CLOSING

For many cases, a particular piece of property may be characterized by receiving documents from a party that identify the time and manner in which the party acquired the property. The corroboration between the documents supplied by the party, and the party’s testimony will often be sufficient to rebut the community property presumption, and establish the separate property character of the property. While the process of tracing each mutation to establish the character of the separate property may be time intensive, it will be benefit your client, and ultimately protect their constitutional separate property rights.

Aaron M.
Reimer is Board
Certified in
Family Law,
by the Texas
Board of Legal
Specialization,
and a Partner
at the Jenkins &
Kamin, L.L.P.
firm in Houston www.jenkin-skamin.com
Focus on...

Five Basic Marketing Skills All Paralegals Should Know

By Emma Hanes

Paralegals are a crucial part of all legal teams. At many law firms, however, paralegals often wear many hats that expand their duties beyond that of the legal field. One duty that often gets assigned to paralegals is marketing. While marketing for a law firm is no small feat, here are five basic marketing skills all paralegals should know.

1. How To Write A Blog—Writing is a huge component of digital marketing and blogging can help your law firm achieve several important goals. Writing about legal topics in blog posts can help bolster your law firm’s credibility, establish rapport between the user and your firm, and highlight recent achievements and legal victories. Additionally, blogs can be shared on social media platforms to increase social engagement and brand recognition. While writing a blog might seem intimidating, keeping these three things in mind will help your blog be a success: (1) Make your blog content relevant to the user. If you are covering a general topic like car accidents, try localizing it to include statistics and facts about your law firm’s local geographic area. (2) Make it easy to read. No one likes huge blocks of text, so break up your post with catchy titles and headers, numbered or bulleted lists, and be sure to include photos and/or videos. (3) Make sure the content is helpful. Most of the time, users are searching for an answer to a specific question, so make sure your blog helps answer that question.

2. Sharing On Social Media—Many people are familiar with social media platforms like Facebook, Twitter, and LinkedIn because of their own personal use, but you can and should also use social media professionally. When you post on social media as a law firm, you need to be mindful of best practices, including the advertising rules for lawyers. Always maintain a professional tone and keep your posts brief. I always recommend including some type of multimedia, as research shows audiences actually want to consume this type of content. If you are sharing a link, most social media platforms will generate an image to appear in the post. If you aren’t sharing a link, include a photo, graphic, or video. This will greatly increase engagement with your posts.

3. Community Management—Law firms need to know how to respond to users across all of their digital assets. Paralegals should monitor and respond to comments and/or reviews left for the firm. Some of the most common places users leave reviews are: Facebook, Google, Yelp, Better Business Bureau pages, and lawyer directories such as Avvo. Responses need to be professional and illustrate the firm’s willingness to help resolve any issues. Also look out for comments left on blog posts and social media posts as users sometimes write out their grievances as comments and it’s important to respond accordingly.

4. Graphic Design—You might be daunted by the thought of doing graphic design work, but I’m not suggesting full blown, Photoshop grade graphic design. There are numerous tools out there that help non-graphic designers easily create beautifully designed
items, like business cards, brochures, presentations, letterheads, infographics and social media graphics, and digital ads, among others. Tools such as Canva have simple interfaces that allow users to work off premade templates, drag and drop components into designs, and easily edit. Because graphic designers can be costly, this is a great affordable alternative for small law firms and/or law firms on a budget.

5. Video Editing—I know what you’re thinking, “Graphic design AND video editing? You have got to be kidding me!” But it’s not as bad as you think. There are many free video editing tools available that are designed for users unfamiliar with video editing. I can’t stress enough how important videos are for marketing your law firm. Having videos on your website can help you better engage with users and videos can actually improve your overall presence in search engine results. Additionally, videos shared on social media often have higher engagement rates than other types of posts. Video editing can be made simple by using tools like Magisto, where you can use existing editing styles to put together a thirty second video in no time at all. Best practices dictate that you should keep your videos relatively short (no longer than two minutes), utilize short and descriptive captions, and only use high quality images and video content. You can use photos and video of your law firm, or utilize stock imagery and video.

Know When You Need Help

This is a pretty comprehensive list of marketing skills. Trying to master all of these skills at once is likely too time-consuming for busy paralegals, so try to focus on one or two objectives until you are comfortable with them and build on from there. Be sure to remain mindful of when you need marketing help. Both working on marketing and being a paralegal are full time jobs. If attorneys at your firm are giving you too many marketing activities to juggle, it might be time for a conversation about getting help either by hiring an in-house marketing person or working with an outsourced consultant or other provider.

Emma Hanes, Digital Content Marketing Manager, Google Analytics Certified Professional, Google Adwords Certified Professional
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Social Security: What Should You Do at Age 62?

By Craig Hackler, Financial Advisor, Raymond James Financial Services

Is 62 your lucky number? If you’re eligible, that’s the earliest age you can start receiving Social Security retirement benefits. If you decide to start collecting benefits before your full retirement age, you’ll have company. According to the Social Security Administration (SSA), approximately 71% of Americans elect to receive their Social Security benefits early. (Source: SSA Annual Statistical Supplement, 2016, released May 2017)

Although collecting early retirement benefits makes sense for some people, there’s a major drawback to consider. If you start collecting benefits early, your monthly retirement benefit will be permanently reduced. So before you put down the tools of your trade and pick up your first Social Security check, there are some factors you’ll need to weigh before deciding whether to start collecting benefits early.

What will your retirement benefit be?
Your Social Security retirement benefit is based on the number of years you’ve been working and the amount you’ve earned. Your benefit is calculated using a formula that takes into account your 35 highest earnings years. If you earned little or nothing in several of those years (If you left the workforce to raise a family, for Instance), it may be to your advantage to work as long as possible, because you’ll have the opportunity to replace a year of lower earnings with a higher one, potentially resulting in a higher retirement benefit.

If you begin collecting retirement benefits at age 62, each monthly benefit check will be 25% to 30% less than it would be at full retirement age. The exact amount of the reduction will depend on the year you were born. (Conversely, you can get a higher payout by delaying retirement past your full retirement age—the government increases your payout every month that you delay retirement, up to age 70.)

However, even though your monthly benefit will be 25% to 30% less if you begin collecting retirement benefits at age 62, you might receive the same or more total lifetime Social Security benefits as you would have had you waited until full retirement age to start collecting benefits. That’s because even though you’ll receive less money per month, you might receive more benefit checks.

The chart above shows how much an estimated $1,000 monthly benefit at full retirement age would be worth if you started taking a reduced benefit at age 62.

If you want to estimate the amount of Social Security benefits you will be eligible to receive in the future under current law (based on your earnings record) you can use the SSA’s Retirement Estimator. It’s available at the SSA Website at ssa.gov. You can also sign up for a my Social Security account to view your online Social Security Statement at the SSA website. Your statement contains a detailed record of your earnings, as well as estimates of retirement, survivor, and disability benefits. If you’re not registered for an online account and are not yet receiving benefits, you’ll receive statement in the mail every year, starting at age 60.

Have you thought about your longevity?
Is it better to take reduced benefits at age 62 or full benefits at full retirement age?
later? The answer depends, in part, on how long you live. If you live longer than your "break-even age," the overall value of your retirement benefits taken at full retirement age will begin to outweigh the value of reduced benefits taken at age 62.

You’ll generally reach your break-even age about 12 years from your full retirement age. For example, if your full retirement age is 66, you should reach your break-even age at 78. If you live past this age, you’ll end up with higher total lifetime benefits by waiting until full retirement age to start collecting. However, unless you’re able to invest your benefits rather than use them for living expenses, your break-even age is probably not the most important part of the equation. For many people, what really counts is how much they’ll receive each month, rather than how much they’ll accumulate over many years.

Of course, no one can predict exactly how long they’ll live. But by taking into account your current health, diet, exercise level, access to quality medical care, and family health history, you might be able to make reasonable assumption.

How much income will you need?

Another Important piece of the puzzle is to look at how much retirement income you’ll need based partly on an estimate of your retirement expenses. If there is a large gap between your projected expenses and your anticipated income, waiting a few years to retire and start collecting Social Security benefits may improve your financial outlook.

If you continue to work and wait until your full retirement age to start collecting benefits, your Social Security monthly benefit will be larger. What’s more, the longer you stay in the workforce, the greater the amount of money you will earn and have available to put into your overall retirement savings. Another plus is that Social Security’s annual cost-of-living increases are calculated using your initial year’s benefits as a base - the higher the base, the greater your annual increase.

Will your spouse be affected?

When to begin receiving Social Security is more complicated when you’re married. The age at which you begin receiving benefits may significantly affect the amount of lifetime income you and your spouse receive, as well as the benefit the surviving spouse will be entitled to, so you’ll need to consider how your decision will affect your joint retirement plan.

Do you plan on working after age 62?

Another key factor in your decision is whether or not you plan to continue working after you start collecting Social Security benefits at age 62. That’s because income you earn before full retirement age may reduce your Social Security retirement benefit. Specifically, if you are under full retirement age for the entire year, $1 in benefits will be withheld for every $2 you earn over the annual earnings limit ($17,040 in 2018).

Example: You start collecting Social Security benefits at age 62. You continue working, and your job pays $30,000 in 2018. Your annual benefit would be reduced by $6,480 ($30,000 minus $17,040, divided by 2).

Note: If your monthly benefit is reduced in the short term due to your earnings, you’ll receive a higher monthly benefit later. That’s because the SSA recalculates your benefit when you reach full retirement age, and omits the months in which your benefit was reduced.

Other considerations

In addition to the factors discussed here, other financial considerations may influence whether you start collecting Social Security benefits at age 62. How do other sources of retirement income factor in? Have you considered how your income taxes will be affected?

What about personal considerations? Do you plan on traveling, volunteering, going back to school, starting your own business, pursuing hobbies, or moving to a new location? Do you have grandchildren or elderly parents whom you want to help take care of? Every person’s situation is different.

For more information

Social Security rules can be complex. For more Information about Social Security benefits, visit the SSA website at ssa.gov or call (800) 772-1213 to speak with a representative. You may also call or visit your local Social Security office.
How to Create a Networking Tickler System

“This article was originally published on Lawyerist.com.”

By Sam Glover

Networking is as simple as getting out and doing things with people, but as you become more active, it can be hard to keep track of your growing network. You could use CRM software, but it tends to insist on reducing relationships to transactions and encourages artificial communications. Also, it can be pretty expensive.1

What you need is a simple system for keeping track of who you know and prompts you to connect or follow up. I call my system a networking tickler, and here’s how it works.

Building Your Networking Tickler

You can make virtually anything that lets you organize contacts or notes into groups into a networking tickler. Evernote works great because of its built-in business card scanner, but so do OneNote, manila folders, your contacts app, a small notebook, a box of index cards, etc.

All you need is an inbox and six folders/tags/groups/notebooks/buckets:

1. Inbox
2. Initiate/Re-Engage
3. Engaged
4. Follow Up
5. Disengaged
6. Other

(What you name your buckets is not all that important as long as you know what they mean.)

On the right is what my networking tickler looks like in Evernote:

(For Evernote users, the reason I name folders “People.Engaged” instead of just “Engaged” is because it is easier to find all the people notebooks when using the search field. As soon as I type the first few letters of “People,” all the notebooks pop up.)

What Goes into Your Buckets

Inbox. This is where you dump all the business cards, cocktail napkins, names, notes, and anything else you may collect that represents someone you want to meet or follow up with. You can just use a regular inbox for this. I use my general-purpose inbox notebook in Evernote, but you could also use the inbox on your desk, in Dropbox, or whatever works for you.

You don’t need a special new inbox unless it makes you more effective.

Initiate/Re-Engage. This bucket functions like a to-do list. Your goal is to move people from this bucket to the Engaged bucket by doing something with them. This could be coffee, a walk, a backyard barbecue, sending a note—whatever suits the nature of your relationship with that person.

Engaged. This bucket contains the people you are actively engaged with, either because you have an appointment on the calendar or you see them all the time. Good job!

Every once in a while, go through your Engaged bucket and make sure you really are engaged with everyone in it. If you aren’t, move them to the appropriate folder.

Follow Up. This bucket also functions like a to-do list, for thank-you notes, reminders, tickets to shows or sporting events, etc. Follow up is an essential part of networking, and this bucket will help you make it happen.

Once a week, process your inbox and sort all your contacts into your other buckets. Don’t do anything else with them right now. Just decide where they belong.

For example:

• The note about your best referral source’s favorite sport gets added to the note you already have for them, which you can move to Follow-Up so you can get tickets for the next game.
• The business card from that annoying guy who just passed a stack of his cards around the room probably goes in the trash.
• A cocktail napkin that says “find an estate planning lawyer in Springfield” goes into Initiate/Re-Engage.
• The new business card you got from your best friend who just started a new job probably goes in Engaged. If you already have a note for them, just add the new information.
• Your spouse’s shoe size that you finally remembered to write down so you can buy new boots for their birthday gets added to the note you keep for them in Other.
Using Your Networking Tickler
You should plan to “do marketing” on a regular schedule. Block off an hour on your calendar every week when you can sit down and process the business cards in your inbox, contact people in your Initiate/Re-Engage folder, send follow-ups, and otherwise move your networking efforts along.

Set a goal of three networking activities every week. (You can decide what counts as networking, but at a minimum it should probably involve, you know, people.)

Need ideas? Here are some more great articles to help you fire up your networking:

- “How to Network: Get Out and Do Things. With People.”
- “How to Make Small Talk”
- “An Introvert’s Guide to Networking Events”
- “An Essential Networking Ingredient: Followup”
- “Event Planning for Lawyers”

Don’t Try to Automate Relationships
The point of a networking tickler is to help you keep track of your real relationships, not to automate superficial relationships.

If you want to have a strong referral network, stay away from automated solutions. Those “just-checking-in” emails you can automatically send at regular intervals from your CRM software are phoney, and it’s obvious you didn’t put any effort into sending them. It only takes a little more effort to be genuine, and it will pay off in spades.

1. CRM stands for customer relationship management, and CRM software is designed to help companies drive sales by improving their relationships with their customers by helping them keep track of everything they know about their prospects, leads, and customers. Because CRM software is built to manage relationships with customers, it is designed to facilitate sales. For example, contacts are nearly always categorized as leads, prospects, and “wins.” This works great for selling things, but not so well for managing actual relationships.

Sam is the founder of Lawyerist.com, the best place for lawyers to learn how to start, manage, and grow a law practice, and home to the community of innovative lawyers building the future of law.

@samglover
medium.com

PARALEGAL DIVISION ONLINE STORE

Excited about TAPS 2018?
TAPS 2018 Merchandise Available!
Visit the PD online store today!

TAPS 2018—September 26–28, 2018
The Crowne Plaza Dallas Near The GalleriaAddison, TX
Click here for more information. To register click here.

The State Bar of Texas was the first bar association in the United States to create a separate division for paralegals. The Division was created on October 23, 1981, and charged with “enhancing legal assistants’ participation in the administration of justice, professional responsibility, and public service in cooperation with the State Bar.” The term “legal assistants” later was changed to “paralegals.” The Division looks forward to fulfilling its mandate enthusiastically, energetically and professionally.

The Paralegal Division of the State Bar of Texas offers members merchandise to promote the paralegal profession and their membership of the Paralegal Division.
http://www.cafepress.com/paralegaldivision
The Paralegal Division hosts the Texas Advanced Paralegal Seminar (“TAPS”) annually in Texas. This three-day CLE event is open to members and non-members and offers up to fourteen (14) hours of CLE, together with a keynote speaker luncheon, socials, and a large vendor hall.

Here are comments from PD member Brenda Colvin (District 4) from last year’s TAPS:

10-5 Schedule—I absolutely love the TAPS app that we have had the last 3 years! It is great to be able to pull up all things TAPS on your phone and know (or find out) whatever you need. When chatting with friends, no need to find the schedule you printed and highlighted at the office to tell them what class you’re doing next or tomorrow, or whatever. There was a map so I could find the next location easily. The survey and rating of the speakers is right there and no need to fill out the paper one and do all that writing!!! Thank you to Misti for this addition to the experience.

Top 10 Paralegal Responsibilities—This is just one of the classes that I attended and got great enjoyment from. I learned something new in each session but Michelle O’Neil was my favorite speaker. She was spunky and full of energy! You’ll also see in the picture my flat friend, Brooke, who hasn’t been able to attend the last few years. She looks forward to my posts and pictures so she can kind of experience TAPS. The VENDOR card!!! Always a pleasure to see vendor reps and get their goodies! I love seeing the “regulars” each year, Dean (KTA); Frank (Innovative Solutions); Debbie (TLC); and John (Hollerbach) are the first ones that come to mind. We can always count on them for a good time and great support. THANKS!!

Masquerade-Table—Every year, I look forward to seeing my good buddy, Monty Mayes! We connected as association presidents in 2010 at TAPA and have been steadfast friends ever since. We reconnect every year at TAPS. Since I was alone this year, he made sure I had a companion for all events. Together, we met Wayne Baker from Granbury at the Wednesday night social. This was his first TAPS and we look forward to seeing him again next year. The other 2 ladies were at our table for the masquerade Mystery event. I am sorry that I can’t remember their names but we had fun and enjoyed trying to solve the mystery together! Not pictured is Stacey Holly who was at our table but she escaped before we got our picture taken.

TAPS is the most wonderful way to network and learn and have fun!!

If you have not been to TAPS or have not been in a while, we encourage you to register and join us in Addison for this year’s TAPS!
PARALEGAL DIVISION
ANNOUNCES
TAPS 2018 SCHOLARSHIP

For the upcoming 2018 Texas Advanced Paralegal Seminar (TAPS), a three-day CLE seminar, the PARALEGAL DIVISION of the State Bar of Texas will award up to two (2) educational scholarships for the three-day registration to attend the TAPS 2018 seminar, "JUST IN TIME FOR CLE – THE MAGIC OF TAPS 2018." Below are the guidelines and application for applying for this scholarship.

1. The Recipient must be a member (or apply for membership) of the Paralegal Division of the State Bar of Texas.
2. To apply for a TAPS scholarship, the applicant is required to submit a written essay on the following:
   Why networking and membership in professional associations are important to a paralegal's career?
   "We all need people who will give us feedback. That's how we improve." ~Bill Gates
   "Change is inevitable. Growth is optional." ~John Maxwell
   "Networking is more about 'farming' than it is about 'hunting'. It's about cultivating relationships." ~Dr. Ivan Misner
   The essay must be two (2) pages in length and double-spaced.
3. To apply for a TAPS scholarship, the applicant is required to provide two (2) letters of personal reference, which describe the applicant's involvement in the paralegal profession.
4. Financial need shall be a contributing factor, but not a requirement. However, if two or more applicants are tied in meeting the criteria for the scholarship, financial need shall be the determining factor.
5. Recipients are required to volunteer a minimum of three hours on-site during the event.

Other
1. No money will be sent directly to the recipient.
2. The scholarship for TAPS shall cover the cost of the three-day registration, but does not include the socials, travel, or hotel expenses.
3. The scholarship selection committee for reviewing scholarship applications for TAPS shall be composed of the Chair of the TAPS Planning Committee, one Planning Committee Sub-Committee Chair, and the Board Advisor to the TAPS Planning Committee.

The Paralegal Division of the State Bar of Texas will award scholarships for TAPS 2018 which will cover the cost of registration in accordance with the TAPS scholarship guidelines.

TAPS 2018 SCHOLARSHIP APPLICATION


Name ___________________________ PD Membership No. ___________________________
Home Address ___________________________ Email Address ___________________________
Home Telephone ___________________________ Work Address ___________________________
Work Telephone ___________________________ Fax Number ___________________________
Employer ___________________________

Are you a member of a local paralegal organization that offers a scholarship award?

Give a detailed description of your reason for seeking a scholarship to TAPS 2018:

__________________________________________________________________________________

__________________________________________________________________________________

Attach two (2) letters of personal reference and your written essay to this application. Applications should be mailed to: Stephanie Sterling, TLBS-BCP, Scholarship Chair of the TAPS Planning Committee, 303 Colorado, Suite 2300, Austin, TX 78701, or email to taps@txpd.org. Scholarship recipients will be notified by letter or email by August 10, 2018.

__________________________________
Applicant's Signature

Attach any additional explanations
Texas Advanced Paralegal Seminar
A Three Day Multi-Track CLE

September 26, 2018 – September 28, 2018
REGISTRATION

(Registration is ONLY available online HERE)

Three-Day Registration

- Admission to all CLE programs, socials and attendee luncheon
- Seminar materials downloaded prior to event and available on TAPS App
- Admission to the Thursday Exhibit Hall featuring legal products and services
- Complimentary Continental Breakfast on Thursday and Friday
- Complimentary ticket to the Friday Attendee Luncheon
- Complimentary ticket to the Wednesday Welcome Social and Thursday Networking Social

One-Day Registration

- Admission to one day of CLE (Wednesday/Thursday socials and Friday Luncheon are an additional fee)
- Seminar materials downloaded prior to event and available on TAPS App

HOTEL ACCOMMODATIONS

The Crowne Plaza Dallas Near Galleria—Addison is located at 14315 Midway Road, Addison, Texas 75001. The reservation deadline is September 10, 2018. Hotel reservations must be booked and cancelled through The Crowne Plaza. **Guest Room Rate is $139.00 for single/double.** To reserve a hotel guest room, call 972-980-8877, push 1 for reservations and request the group rate for TAPS 2018—Paralegal Division State Bar of Texas OR book online [here](#). The Crowne Plaza Dallas Near Galleria is located approximately 20 minutes from both DFW and Dallas Love Field airports.

SOCIALS

The MAGIC OF TAPS continues with our SPELLBINDING NETWORKING SOCIAL on Wednesday night at the Crowne Plaza. There will be networking with old and new friends and our magical vendors. Enjoy the cocktail hour (cash bar) with drinks and light hor d’oeuvres while you visit. The magic is just beginning; we still have plenty of time for more CLE and fun!

On Thursday evening you will be transported to the Magic Time Machine for A SPECIAL KIND OF MAGIC. There is no end to the people you will meet at the Magic Time Machine. Enjoy a wonder dinner while visiting your TAPS friends and our sponsoring vendors. Wear your favorite attire of any kind, really! You can be a superhero, Disney Princess, your favorite movie character. **Really the there is not end to the possibilities!**

REGISTER EARLY AND SAVE!

Deadline for early registration is August 14, 2018. All online registrations received beginning August 15, 2018 will be subject to a $35 late fee. On-Line Registration ends September 17. Registration is available ONLINE ONLY at [www.txpd.org/taps](http://www.txpd.org/taps). Credit card, check or money order is accepted as payment. There is a $5.00 handling fee for payment by check or money order. On-site registration is by check or money order only.
Our Friday morning session will include three 15-minute presentations, followed by a Q&A opportunity.

Katrina Lea, 2017 Exceptional Pro Bono Award winner, speaking on "Pro Bono Ethics & the Paralegal"; Melissa Sircar, TCBA Pro Bono Programs Director, speaking on "Pro Bono Opportunities" (including Texas Lawyers for Texas Veterans and Clinic in a Box programs); and Ethan Minshul, attorney, speaking on "Pro Bono Paralegals: In and Outside the Firm".

The final recap and motivational closing will be presented by the 2018 Exceptional Pro Bono Award winner.

Whether you're already involved in pro bono services, or would like to learn more about how you can participate, this is a session that you won't want to miss!

Register Online Now! - - www.txpd.org/taps
HON. ANNE ASHBY (RET.)

DALLAS, TEXAS – Judge Ashby maintains a vibrant Alternate Dispute Resolution (ADR) practice as a highly sought out Arbitrator and Mediator. She is a Fellow with The Chartered Institute of Arbitrators and a Distinguished Credentialied Mediator by the Texas Mediator Credentialing Association (TMCA). Her unique combination of expertise as a trial lawyer, assistant district attorney, civil litigation strategist, trusted advisor, Judge of the 134th District Court and County Court at Law #3 brings a great level of value to her clients. Judge Ashby is “Of Counsel” with Shields Legal Group, bringing sympathetic listening learned from years on the bench to help provide strategic business insight and professional services to entrepreneurs and small to mid-sized Texas based companies. Her fine-tuned advice along with trial strategy makes for a winning combination. Judge Ashby’s special regard for the disabled and elderly, allows her to sustain a gratifying probate administration practice in guardianship and ad litem arenas. Judge Ashby shines in many roles and well-known for her “bench-wisdom” and sterling reputation for fairness and equity.

Benson Varghese

Benson Varghese is the founder and managing partner of Varghese Summersett PLLC. Benson represents individuals charged with the most serious state and federal criminal offenses. He has proven himself in and outside of the courtroom as an attorney who has obtained favorable results handling complex criminal matters.

Benson has tried over 100 cases to juries and has been recognized as a Top 100 Trial Attorney by the National Trial Lawyers Association. He has been named a “Top Attorney” by Fort Worth Magazine every year since 2012. He is also a member of the College of the State Bar of Texas, a distinction held by less than 10 percent of all licensed attorneys in Texas.

Benson has extensive experience litigating issues relating intoxication (alcohol, drugs, and prescription drugs), specimen analysis (breath and blood), and retrograde extrapolation in DWI, intoxication assault, and intoxication manslaughter cases.

Benson is a member of the Federal Bar Association. He regularly handles federal criminal cases and focuses on federal conspiracy charges and cases where the government is relying on sophisticated means of detection.

He has also successfully represented individuals charged with all levels of sexual allegations, ranging from indecency charges to sexual assault of a child, and continuous sexual assault charges.

Benson also represents corporations (including corporate management and directors) being investigated for fraud, securities violations, antitrust violations, and breaches of the Foreign Corrupt Practices Act. Benson works with the Corporate Compliance Team at Varghese Summersett PLLC to develop and implement strategies and corporate compliance programs that are preventive in nature.

www.txpd.org/taps

PATRICIA FRESHWATER

Patricia Freshwater has been an attorney and partner with Schwamkrug, Freshwater & Lopez, PLLC, since 2011. Their law firm provides a full range of legal advice and representation to immigrants. She is passionate about protecting immigrants’ rights and committed to providing effective legal representation in a wide range of immigration matters, from helping people apply for U.S. citizenship to defending immigrants facing deportation and separation from their loved ones. Her practice areas include: family-based visa petitions, naturalization and citizenship, deportation and removal defense, appeals to the Board of Immigration Appeals and the U.S. Court of Appeals for the Fifth Circuit, asylum, special immigrant juvenile status, waivers, Violence Against Women Act and U visa cases for victims of crimes, and deferred action cases.

Prior to opening Schwamkrug, Freshwater, & Lopez, PLLC, she completed an Equal Justice Works Fellowship with a Dallas area non-profit organization. This fellowship program expanded the legal services already offered by the organization by creating a new legal representation and advocacy program to serve the increasing number of immigrants in North Texas being detained by Immigration & Customs Enforcement.

Freshwater graduated summa cum laude from the University of Virginia School of Law in 2006, where she was a Notes Editor for the Virginia Law Review, and a participant in the Immigration Law Clinic. From 2006-2007, she clerked for the United States District Court for the District of Maryland.
## TAPS PRICES

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<tr>
<td>$15</td>
<td>One-Day attendee/Guest</td>
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</tbody>
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* Registration Fee includes ticket to Wednesday social, Thursday social and Friday luncheon

** Social and luncheon tickets can be purchased at an additional fee

** Taps T-Shirt - Complimentary with registration

www.txdp.org/taps

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## SCHEDULE

### Wednesday, September 26
- Registration: 8:00 AM–4:00 PM
- Presentations: 9:00 AM–5:00 PM
- Social: 5:15 PM–6:45 PM

### Thursday, September 27
- Registration: 7:00 AM–4:00 PM
- Exhibit Hall: 7:00 AM–3:00 PM
- Presentations: 8:00 AM–4:00 PM
- Social: 6:00 PM–9:30 PM

### Friday, September 28
- Registration: 8:00 AM–10:00 AM
- Presentations: 8:30 AM–12:00 PM
- Luncheon: 12:00 PM–1:30 PM

## SPONSORS

**TITLE SPONSOR**
- Innovative Legal Solutions

**PLATINUM SPONSORS**
- File & ServeXpress LLC
- Hollerbach&Associates, Inc.

**GOLD SPONSORS**
- KTA—Kim Tindall & Associates
- SLS Litigation Services, LLC

**BRONZE SPONSORS**
- Hanna & Hanna, Inc.

See Complete List of Sponsors and Exhibitors: www.txdp.org/TAPS/Sponsors.asp
Ethical Considerations Regarding Assisting the Public with Legal Issues

Ellen Lockwood, ACP, RP

Paralegals are often approached by members of the public about assisting them with legal matters. While paralegals should be clear that they cannot assist anyone with a legal matter except under the direct supervision of a licensed attorney, advising someone that you cannot assist with their legal matter does not provide the person with any answers. It is best if you can also offer alternative sources of assistance with their legal matters.

Many people cannot afford to hire an attorney and contact a paralegal hoping to get assistance without having to pay an attorney’s billable rate. Unscrupulous paralegals will take advantage of people who may be desperate, and who likely do not realize paralegals are not permitted to directly assist members of the public other than under attorney supervision. As members of the legal profession, we have a responsibility to educate the public that only a licensed attorney may to assist them with their legal matter. We also have an obligation to direct people to available resources for assistance with their legal issues.

For those who qualify, there are numerous legal aid organizations in Texas. The State Bar maintains a list of legal aid organizations and there are usually several in each county. The Lawyer Referral Information Service is available for 246 counties and offers referrals to an attorney who will meet with the person for 30 minutes for no more than $20.

The website TexasLawHelp.org provides free legal information and forms, as well as free assistance with legal matters. Although this site includes forms, non-attorneys may not assist members of the public with completing these forms, as that would be considered the unauthorized practice of law.

Another way to assist those who cannot afford to hire an attorney is to volunteer to assist attorneys in your firm with pro bono work, or to assist with other pro bono opportunities. Most local bar associations and paralegal associations have information on local pro bono opportunities. There are also opportunities available through Access to Justice. If you see an unmet need for a pro bono legal clinic in your area, the State Bar has a Care Kit to assist legal organizations with setting up legal clinics. The State Bar also offers training and other resources to support attorneys doing pro bono work.

To help promote awareness of pro bono activities, and encourage members of the Paralegal Division to volunteer with pro bono projects, the Paralegal Division has an Exceptional Pro Bono Award. Paralegals may also join the State Bar’s Pro Bono College.

If you become aware that someone is receiving assistance with a legal matter from a non-attorney, even if the non-attorney is only serving as a scrivener, you should make him or her aware that non-attorneys may not assist the public directly, but only under the direct supervision of a licensed attorney. You may also direct the person to contact the Supreme Court of Texas UPL Committee, which has an online form. If the person assisting them claims to be a paralegal, you can suggest they contact the Paralegal Division at ethics@txpd.org to determine if the paralegal is a member, as well as to receive referrals to other resources for making a complaint regarding the non-attorney.

Pursuant to the Paralegal Division Code of Conduct and Professional Responsibility, we have a duty to assist in the prevention of the unauthorized practice of law, as well as assist in the administration of justice and public service in cooperation with the legal profession.

Ellen Lockwood, ACP, RP, is the Chair of the Professional Ethics Committee of the Paralegal Division and a past president of the Division. She is a frequent speaker on paralegal ethics and intellectual property and the lead author of the Division’s Paralegal Ethics Handbook published by Thomson Reuters. You may follow her at www.twitter.com/paralegalethics and she may be contacted at ethics@txpd.org.
This is membership renewal time for the Paralegal Division and some members have been asking, “Where is my new colored bar card?” after they have renewed. The PD no longer issues membership cards annually. Last year was the final year for the distribution of renewal membership cards. Hang onto your traditional burgundy PD card and proudly carry it with you!
On April 21, 2018, from various parts of the great State of Texas several eager travelers started their journey where they would eventually meet up in Belgium. The group arrived in Brussels early Saturday morning and started their day off with a tour of the beautiful Royal Greenhouses At Laeken. Our group stayed at the historic Flanders Hotel in Bruges. We ended our first day with a leisurely stroll through the streets and over the canals of Bruges for a welcome dinner and discussion about all the exciting plans for our week.

On April 22 the group met up with Katrien for a walking tour to learn about Bruges (Brugge), a city as old as the 9th Century. Bruges was a very wealthy city at one time, with much of the world trade centered here. The city is full of history and beautiful architecture, including The Belfry which is the center of Bruges’ Market Square. Of course, with Bruges being the place where the diamond grinding process was developed we visited the Diamond Museum where we learned of process.

Monday morning, we loaded on the bus to travel to Brussels for a very informative visit and private presentation at the European Commission Visitor Center. After this presentation our tour guide Chris Relton provided additional information about the European Union. We then enjoyed a walking tour of this beautiful city and enjoyed the afternoon with free time to witness the architecture of this ancient city, including the unbelievable Grand Place market square.

Our next day was a continued opportunity to explore Bruges and to take part in a
chocolate making class at the Choco Story Museum. Our chocolatier Lawrence was very patient and helped each of us make up a tasty batch of Belgium chocolate. We also visited a lace museum to watch the ancient art of lace making. Who can be in Belgium without taking part in a beer tasting? This is how we ended our last day in Bruges.

Wednesday, we made an early departure for our trip to Amsterdam, but not before a few exciting stops. The first being a visit to the Kinderdijk Museum and windmills. We learned of the importance of these windmills to the land, life and sustainability of the Netherlands. We then made our way to the Royal Delft Factory for a tour of the factory and information about its history. After our tour and the requisite shopping, we had a fabulous high tea on real Delft china. Our final stop before arriving in Amsterdam was in Hillegom for a photo opportunity in front of breathtaking tulip fields.

On this day we took a guided tour of Amsterdam, a city with many beautiful canals. We also enjoyed a visit to the Rijksmuseum to see its many infamous works of art. We ended this memorable day with a Rijsttafel dinner on a canal cruise.

On our final day our group was lucky enough to be in Amsterdam during King’s Day! The day the Netherlands celebrates their king’s birthday. We went all out and wore the traditional orange. We also visited the Anne Frank Museum and the Van Gogh Museum. Finally, we relived all the exciting events of this fantastic trip at our farewell dinner at a local canal house. The wonderful hosts at this dinner gave us a history of Amsterdam.

Visit the PD Face book page for additional photos of this trip (https://www.facebook.com/ParalegalsTravelOverseas/?fref=nf)

Please consider Joining the PD as it returns to London the location of the first Paralegal Division trip. Registration details can be found in this issue of the TPJ and at www.txpd.org.
Kinderdijk Windmills

Rijksmuseum—Group

Tulip Fields

Rijstafel Dinner Cruise

Amsterdam—Going Orange for Kings Day

Amsterdam—Group Rijsttafel Dinner Cruise

Rijstafel Dinner Cruise

Kings Greenhouses
PARALEGALS RETURN TO
London
April 12 – April 20, 2019
(Eight Days and Seven Nights)

FRI, April 12, 2019 -- Depart from the USA to Europe.

SAT, April 13, 2019 (London) – Morning arrival. Enjoy this day to get familiar with your surroundings. This evening enjoy a special welcome dinner to kick off your trip. (D)

SUN, April 14, 2019 (London) – This morning you will enjoy a guided sightseeing tour with blue badge guide which highlights the best of London. (B, D)

MON, April 15, 2019 (London) – Today enjoy a full-day excursion to York by train, with a visit to York Minster. Return to London this evening. (B, L)

TUE, April 16, 2019 (London) – This morning we will tour the infamous Tower of London. In the afternoon, you will visit Parliament. This will be an evening to remember with dinner followed by a West End Show. (B, D)

WED, April 17, 2019 (London) – Early morning departure for a full day excursion to Stonehenge and Salisbury. Late evening return to London. (B)

THU, April 18, 2019 (London) – Enjoy a free day in London with a farewell dinner this evening. (B, D)

FRI, April 19, 2018 (London) – Today we will enjoy a visit to the London Eye in the morning and an afternoon visit to Kensington Palace with High Tea at St. Martin in the Fields. (B, L)

SAT, April 20, 2019 - Depart for the USA. (B)

FEE WITH AIR INCLUDED: Register by August 1, 2018 and receive a $200 Discount. Fee is based on registration by December 1, 2018.

Fees: Departing DFW/Houston– $4,526; Austin/San Antonio-$4,786 Amarillo/Midland - $4,826 (includes program fee). Note: Registrations after August 1 may include additional fuel surcharges that are finalized 45 days prior to departure; an invoice will be sent at that time if there are any increases. Other departure cities available upon request. Fees based on 20 persons and includes airfare, hotel, transportation, tours, and meals as indicated above.

Additional/Optional fees: Single room supplement: $859; Ultimate Protection Plan: $270; Comprehensive Protection Plan: $225; If the Ultimate or Comprehensive Plan is purchased there is a surcharge for guests ages 66+: $100

LAND ONLY FEE: (if you wish to make your own air travel arrangements): $3,479

PAYMENT SCHEDULE: Deadline for registration is November 1, 2018. Initial non-refundable deposit is $200; another $295 payment will be due 30 days after registration, third payment of $500 is due November 15, 2018; fourth payment of $500 is due on December 15, 2018, with balance due on January 15, 2019. Non-payment of required on-time monthly payments will result in trip cancellation.

MAKE IT EASY ON YOURSELF! SIGN UP FOR AUTO PAYMENTS: Automatic Payments plan available. Automatic Payments makes planning your trip budget easy because your payments are spread out evenly, giving you more time to pay. You choose a payment frequency (every 2 weeks, every 4 weeks, monthly, or quarterly) and your payments are automatically deducted from your checking or savings account. Travelers who use autopay will be given a $50 discount. Automatic Payments are available for all registered participants in "My Account:" at www.acis.com/accounts.
100 PD Club
For 2017—2018

Thank you to the following firms for having 100% Paralegal Division enrollment:

Bohrer & Zucker, LLP (Houston)
Jones & Jones (Longview)
Kaplan & Moon, PLLC (Dallas)
Law Offices of Jason Smith (Fort Worth)
Law Offices of Terri More and Michael Ware (Fort Worth)
Robert M. Phillips & Associates (Georgetown)
The Brender Law Firm (Fort Worth)
The Dauphinot Law Firm (Arlington)
The McCall Firm (Austin)
The Woodmont Company (Fort Worth)
Weinman & Associates (Austin)

Law firms and legal departments with 100% of their paralegals enrolled as PD members for 2017–2018 qualify for the “100 PD Club” to be featured in this edition. For a “100 PD Club” form for 2018–2019, please see the notice in Winter/Spring TPJ or e-mail Megan Goor, at tpj@txpd.org, and type “100 PD Club” in the subject line after March 1st.

In Memoriam…
Susan Dean

Susan Dean was a paralegal with Cantey Hanger LLP for over 36 years. Susan’s involvement with the organization and charter of The Fort Worth Paralegal Association has forever changed our profession in the N. Texas Legal Community. Susan had a wonderful sense of humor, she loved her family & friends and she loved rescuing and finding forever homes for dogs in need. Survived by: Stepmother Virginia Dean, Brother, Philip Dean and wife Kathy, Niece Christen, and Nephew Austin.

To submit a memorial for a PD member, e-mail Megan Goor, at tpj@txpd.org, and indicate “Memorials Form” in the subject line.
PARALEGALS
Texas Bar College
Associate Membership

PRIDE & PROFESSIONALISM

REQUIREMENTS
A paralegal may become, or may maintain his or her status as an associate member of the College by:

(1) completing twelve hours of approved CLE in the current or preceding calendar year, including 2 hours ethics
(2) paying the required fee,
(3) submitting an application form on which a licensed Texas attorney verifies the applicant's good character and qualifications as a paralegal, and
(4) submitting a report identifying the sponsor of the CLE programs attended, the specific topics included, the names and firms of speakers on the programs.

Two of the twelve hours, including one hour ethics, may be earned through non-accredited CLE and submitting the necessary information for each.

PURPOSE
In delivering the highest quality legal services to clients, the lawyer-paralegal team is an essential element. As the law develops, continuing legal education for paralegals is as important as it is for lawyers. Through associate member status, the College honors paralegals that make a commitment to maintain and enhance their professional skills through attending an extraordinary amount of continuing legal education hours.

BENEFITS
- A certificate of membership and a leather portfolio with the Texas Bar College logo
- Newsletter sent three times a year
- Distinction of attaining a higher level of professional membership
- Unlimited free access to the Online Library of TexasBarCLE.com that includes thousands of CLE articles from TexasBarCLE courses
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