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TPIJ

Texas Paralegal Journal





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PRESIDENT'S *Message*

Mona H. Tucker, ACP

Oh, my gosh! It's spring already. There's so much going on right now that I feel like the white rabbit—I'm late! I'm late for a very important date! Sometimes I think I meet myself coming back.

Stephanie Sterling and I recently attended the Council of Chairs meeting in Austin, where I was privileged to address the State Bar's section leaders. I brought them up to date on happenings in the Paralegal Division, and when I told them about TAPS, I felt myself tear up. Not because of TAPS, goodness no! But, you see, this year, instead of giving gifts to our speakers and volunteers, we will be donating those funds to the Chris Kyle Foundation to benefit our military veterans. When I made that announcement, the section leaders all started clapping. What a wonderful affirmation for what we are doing!

Stephanie and I left the Council of Chairs meeting and headed over to the TBLS Induction Ceremony, where 30 paralegals and 194 attorneys were honored for passing the certification exam. Of the

30 paralegals, 24 are PD members. How exciting! Congratulations to every one of you!

The State Bar has a brand-new section, the Child Protection Law Section, and we're all eligible to join. (Spoiler alert: It's rumored we're going to have a VIP speaker at TAPS to tell us more about it!) I am so excited to see the momentum being created in this area, and very appreciative that the Paralegal Division has been invited to get in on the ground floor. The 1st Annual Advanced Child Protection Law Course is scheduled for April 19 & 20 in Austin.

Let's see—the PD trip to Bruges, Brussels, and Amsterdam is in late April. Then I have a homecoming down in the Piney Woods (did I ever tell you that I'm an amateur genealogist?). And we have Easter, Mother's Day, Father's Day, graduations—oh, and *Annual Meeting!* For heaven's sake, make plans to be in Austin for Annual Meeting on June 22. Stephanie



Sterling will be installed as President for 2018-2019, Megan Goor as President-Elect, Directors and officers (both new and returning) will be installed, and we'll hear some very interesting speakers.

May 31 is the deadline to get your CLE hours in for membership renewal. Please

keep in mind that there is a change beginning this year on renewal requirements. One hour of your required six hours of CLE must be in Ethics. That one hour cannot be self-study, and it cannot be carried over from last year, so plan accordingly.

Speaking of CLE credits, during this year's spot audit,

we realized that more than one member had "piggy-backed" on his or her attorney's CLE—meaning that only the attorney paid for and received MCLE credit for the session. I'm delighted that the paralegal attended and received the benefit of the information, but, in order to claim participatory credit for the presentation, she or he has to have either a certificate of attendance or an MCLE number that the Bar enters into our database. Please don't put yourself into a situation where you can't use the CLE hours you think you have.

See you at TAPA—and Annual Meeting—and TAPS ...!



State Bar of Texas
Paralegal Division



NEW ETHICS CLE REQUIREMENT

The Paralegal Division's vision is empowering paralegals; as such the board feels that ethics education is important. At the June 22nd meeting, the Board of Directors voted to approve that for all renewing active and associate members one (1) hour of the current six (6) CLE hours will need to be in Ethics. This new CLE requirement is effective for the 2017-2018 membership renewal period. Upon renewal, all active and associate members should remember when obtaining your six (6) CLE hours that one (1) of those hours will need to be an Ethics CLE obtained by May 31, 2018.

TPJ

Texas Paralegal Journal

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EDITOR'S *Note*

Happy Spring! This issue focuses on professional development and highlights some of the paralegal awards and accomplishments of our membership, including the Texas Paralegal Day celebrations across the state, as well as showing appreciation to our many members who volunteer their time to serve as a director, chair, or ambassador.

The votes are in! The election results of the President-Elect election, even-numbered District Directors' election, and the proposed Bylaws amendments are announced in this edition.

The date for membership renewals is approaching and **YOU WILL NEED 1 HR. OF ETHICS!** Take a look at the membership renewal article by Mary Wintermote and the emphasis of maintaining your CLE certificates.

Incoming President, Stephanie Sterling, TBLS-BCP, will be inducted at Annual Meeting in Austin in June. This is right around the corner. We hope to see you there!

We have two new featured columnists for the *TPJ*: Craig Hackler, Financial Advisor with Raymond James Financial Services, Inc. in Austin, who will provide some financial tips, and Joseph Jacobson, a Dallas transaction lawyer, who will keep us informed about the latest technology and cyber issues.

The "100 PD Club" and "Memorials" sections will be included in the next edition. If you have a submission, please email tpj@txpd.org for more details. The deadline for submissions is May 1, 2018.

MEMBERSHIP SURVEY!

The Board of Directors is considering transitioning our Annual Meeting in June to the TAPS Friday luncheon and would like your feedback and comments. Please take a few moments to take this brief **SURVEY**.



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DEADLINE FOR SPRING ISSUE IS MAY 5, 2018.
E-mail tpj@txpd.org.

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A Strange and Wonderful Relationship

The Ethical Relationship Between Attorney and Paralegal

By: Barbara E. Kirby, JD, PhD



The relationship between attorney and paralegal is complex, personal, sometimes stressful, and always interesting. I think of former Chicago Bears Coach and Dallas Cowboys Hall of Famer Mike Ditka, who said, when speaking of quirky Bears quarterback Jim McMahon: “We have a strange and wonderful relationship—he’s strange and I’m wonderful.” In the attorney-paralegal relationship, one may be strange, one may be wonderful, and reasonable minds may differ about which is which. All parties agree that the solid relationship rests on a strong ethical foundation.

I assume that all readers of this article are familiar with the Paralegal Division of the State Bar of Texas definition of a Paralegal. Even so, for context, I will repeat it here:

“A paralegal is a person, qualified through various combinations of education, training, or work experience, who is employed or engaged by a lawyer, law office, governmental agency, or other entity in a capacity or function which involves the performance, under the ultimate direction and supervision of a licensed attorney, of specifically delegated substantive legal work, which work, for the most part, requires a sufficient knowledge of legal principles and procedures that, absent such a person, an attorney would be required to perform the task.”¹

An important question for attorneys and paralegals concerns “substantive legal tasks.” The NALA Code of Ethics and Professional Responsibility provides:

Canon 1: A paralegal must not perform any of the duties that attorneys only may perform nor take any actions that attorneys may not take.

There are certain actions that, without question constitute the “practice of law.” The first is appearing in court, assumed to require the knowledge and skill that only the lawyer possesses. Besides the actual physical act of passing in front of the bar to represent a client in actions taking place in the courtroom, an “appearance” by filing pleadings is considered the sole dominion of the attorney. Even the advent of electronic filing has not replaced the filing of pleadings as an action requiring overview by the attorney. However, we know this is one of the stickiest areas for paralegals, as the busy lawyer may be tempted to give minimal review to pleadings drafted by a paralegal.

There are a few exceptions: law students working under the supervision of an attorney in a clinic program are allowed, within limitations, to represent clients in court proceedings. Some local court rules permit paralegals to appear in a limited scope while assisting attorneys. More typically, administrative agencies allow non-lawyers to appear and represent clients in a number of circumstances. Administrative law courts are quasi-judicial in nature, and the hearings are similar to but usually less formal than a trial. The federal government has long permitted non-lawyer practice before many administrative agencies. The United States Code provides that persons compelled to appear may be

Focus on...

“accompanied, represented, and advised by counsel or, if permitted by the agency, by other qualified representative.” 5 U.S.C. Section 555 (b). Among the agencies that allow non-lawyer representatives without requiring any specific standards: the Small Business Administration, the National Labor Relations Board, and the Social Security Administration.

The next action that, without question, constitutes the practice of law, is establishing the attorney-client relationship. We all remember the term “fiduciary” - a trustee bound by duties of loyalty and confidentiality acting in a principal-agent relationship. As the relationship rises to the level of fiduciary, only the lawyer should agree to represent a client, including defining the scope of the representation and setting the fees to be charged for the work. An important note about “setting fees”—this does not include paralegals quoting standard fees to a client (with the lawyer’s permission). Paralegals must be careful not to cross the thin line between quoting information about an attorney’s hourly rate or the flat fee for a particular action, and the moment the client exclaims, “OK, let’s do it!”

The final area constituting the practice of law is the tough-to-define skill known as “giving legal advice.” When the attorney gives legal advice, he/she is formulating a substantive opinion that will guide a client’s conduct. The parameters of “giving advice” are complex and sometimes difficult to differentiate from “explaining” to the client. Here is a relevant example: The paralegal handles most of the client contact, and the client has come to trust the paralegal and value their opinion. The client asks a question about what the outcome of a hearing might be, or what course of action is recommended if a particular ruling is made. The response would be a substantive opinion based upon the knowledge and experience of the attorney. The paralegal may have a spot-on answer, also based on knowledge and experience, but to tread into this area is to

risk going beyond the scope of the paralegal’s role. And by the way, there is a dramatic name for this area—the unauthorized practice of law. More on that later.

Although the three areas above are listed as “without question” the practice of law, there clearly has been an expansion of the role of non-attorneys in areas that traditionally may have been solely the purview of attorneys, and I suggest that we will see a greater expansion as clients seek more cost effective representation in basic legal matters. Here are three examples:

1. Will executions—In Texas, the steps for execution of a Last Will and Testament and the attendant Self-Proving Affidavit are very specific, and can easily be overseen by a non-lawyer. This saves the time and expense of an attorney overseeing this simple administrative proceeding. However, no opinion should be given as to the legal effect of the will. If the testator asks: “So what does Executor mean?” I think a paralegal can say, “I believe the attorney explained to you that it is the person who will administer your estate.” If the client then says: “What happens if Bubba refuses to be Executor?” I think it is unfortunately time to suggest that perhaps another meeting with the attorney may be appropriate to clarify that issue.
2. Real estate closings—Once again, Texas does not require the presence of an attorney at real estate closings. These events involve the execution of numerous standardized forms, typically managed by real estate agents and title company personnel, all who have the credentials and training to run these proceedings. The work of the attorney is long over by the time the closing takes place.
3. Settlement negotiations—In personal injury matters, paralegals

are often involved in extensive telephone contact with insurance adjusters and participate in the relaying of settlement offers to the client. Attorneys must still be kept in the loop, and both the attorney and the paralegal are responsible for assuring that all offers of settlement, no matter how ridiculous, are communicated to the client.

As promised, let’s return to the topic of the unauthorized practice of law, as it is the obligation of both the attorney and the paralegal to assure that no one crosses the line. Canon 3 of the Code of Professional Responsibility states: “A Lawyer Should Assist In Preventing the Unauthorized Practice of Law.” Technology is putting a lot of pressure on the changing definition of the unauthorized practice of law. User-friendly programs provide forms, ask questions, and prompt the input. Many clients are turning to Legal Zoom for preparation of wills, and Turbo Tax has replaced human tax preparers. As long as disclaimers are prominent, these types of self-help legal solutions are considered to be ethical. In addition, there is a clear trend nationwide to expand the role of legal document preparers—a non-lawyer legal service provider authorized by court rule or statute to assist persons in representing themselves, without giving advice or appearing in court. In August 2016, the American Bar Association released its long-awaited Report on the Future of Legal Services in the United States. (<http://abafuturesreport.com/#1>) As stated in the preface to the report: “The Commission recognizes that portions of this Report may be viewed as controversial by some or not sufficiently bold by others, but the Commission believes that significant change is needed to serve the public’s legal needs in the 21st Century.” A significant part of the Report focused on recommendations related to various types of Legal Service Providers (LSP’s)—persons other than lawyers—and their ability to address



the unmet need for legal services across the country. Document preparers are just one part of this report—certain federally authorized practitioners, courthouse navigators and facilitators, and Washington State’s Limited License Legal Technicians (LLLT) are all mentioned as cutting edge examples of LSP’s.

The evolution of law towards persons other than lawyers providing various types of legal services does not change the definition and function of a paralegal, nor does it change the relationship between paralegals and attorneys. However, ample opportunity exists in traditional legal settings for paralegals to cross the line into the unauthorized practice of law, and it is incumbent on both the attorney and paralegal to assure that this does not happen. This concern is common in various types of high volume legal practice—paralegals accept clients, obtain signatures on retainer agreements, prepare and file legal documents, and counsel clients with little or no attorney involvement. Remember, any negligent actions that occur within this practice will be the ethical and legal responsibility of the attorney who failed to properly supervise the practice.

In Comment 4 to Rule 5.05 Unauthorized Practice of Law, Texas Disciplinary Rules of Professional Conduct, attorneys can find a guide for proper utilization of paralegals:

“Paragraph (b) of Rule 5.05 does not prohibit a lawyer from employing the services of paraprofessionals and delegating functions to them. So long as the lawyer supervises the delegated work, and retains responsibility for the work, and

maintains a direct relationship with the client, the paraprofessional cannot reasonably be said to have engaged in activity that constitutes the unauthorized practice of law.”

Much of the attorney-paralegal relationship revolves around communication—effective communication with the client as well as communication with each other. It is up to the paralegal to help the attorney communicate effectively with the client. In that regard, it is helpful to be aware of the lawyer’s ethical responsibility related to communicating with the client. Rule 1.4 of the Model Rules of Professional Responsibility is entitled “Communication”, and provides in part that:

- (a) A lawyer shall:
- (1) promptly inform the client of any decision or circumstance with respect to which the client’s informed consent, as defined in Rule 1.0(e), is required by these Rules;
 - (2) reasonably consult with the client about the means by which the client’s objectives are to be accomplished;
 - (3) keep the client reasonably informed about the status of the matter;
 - (4) promptly comply with reasonable requests for information; and
 - (5) consult with the client about any relevant limitation on the lawyer’s conduct when the lawyer knows that the client expects assistance not permitted by the Rules of Professional Conduct or other law.

A professional paralegal will be aware of the need for the attorney to communicate with the client in this manner, and will facilitate these types of requests from the client, especially when it comes to keeping the client informed of the status of matters, and complying with reasonable requests for information. By working as a team, the attorney can maintain the ethically required direct relationship with the client, while delegating appropriate communication with the client to the paralegal.

In conclusion, both the attorney and the paralegal are responsible for assuring that the highest level of integrity exists in their relationship—with each other and with the clients they represent. If all members of the client support team are aware and committed, then this strange and wonderful relationship will be beneficial to all parties!

¹This definition is found in the Texas Paralegal Standards: Texas Paralegal Standards <https://txpd.org/page.asp?p=Paralegal%20Definition%20and%20Standards>



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The Path to Professionalism

By Javan Johnson, ACP, TBLS-BCP

"Ambition never has its fill!" (author unknown)

Just being a part of the legal profession... does that make us professionals? The answer? No! The profession is fast-growing and draws a lot of people. Whenever you have lots of people, you have a lot of personalities and a lot of backgrounds that are brought to the profession. We, therefore, see a lot of ethical violations. So what sets apart those who really want to be leaders in the field—to be a true “professional”? Let’s look at the definition of *professional* — “engaged in one of the learned ethical standards of a profession; participating for gain or livelihood in an activity or field of endeavor often engaged in by amateurs”; then the definition of *professionalism* — “the conduct, aims or qualities that characterize or mark a profession or a professional person.”

We all know that a lot of amateurs have entered this field, which can be taken either way—either amateur due to inexperience in the field (which is common among our students or persons changing careers who strive to learn and make their mark), or amateur as “one who engaged in a pursuit, study, science or sport as a *pastime* rather than as a *profession*.” This is where we must focus. To really become a true professional in this legal field, we must strive to place ourselves ahead in the race. There must be the desire to succeed, the desire to learn, the desire to be loyal, the desire to become involved, the

desire to be ethical, and so much more. Therefore, we meet the path to professionalism. How do we become that type of person, rather than staying the “amateur”? These are some of the “laws” to the path to professionalism:

Professionalism develops daily, not in a day!

- Just like investing your money, you have to let it compound every day and learn from it.
- It takes a lifetime to really develop your investment to the fullest.
- Build relationships with your employers, with other legal professionals, with your clients, with court personnel, with vendors. Make yourself known so that you will be remembered.
- Be conscious that you are ignorant of facts or knowledge at times, and let that be a learning lesson

The true measure of professionalism is influence!

- Be a good influence on others and they will follow you.
- Be a good listener.
- Take time to teach, and thank those that teach you.
- You achieve excellence when people will follow you, even if it is only out of curiosity.
- It’s not the position that makes you a professional, it is the professional that makes the position.

Professional ability determines a person’s level of effectiveness!

- You can work hard to increase your dedication to success and excellence, but you must also increase your leadership abilities.
- The greater the impact you want to make, the greater your influence needs to be—let’s make it a positive influence.
- Personal and organizational effectiveness is proportionate to the strength of leadership.
- There are smart, talented, successful people who are able to go only so far because of the limitations of their leadership.

Anyone can steer the ship, but it takes a leader to chart the course!

- Draw on past experience.
- You must go through a process in order to be successful.
- A leader sees more than others see, sees farther than others see, and who sees before others do.
- Listen to what others have to say.
- If the leader can’t navigate the people through rough waters, he is liable to sink the ship.
- Chart your course:
 - Determine a course of action
 - Set your goals
 - Adjust priorities
 - Head into action
 - Expect problems
 - Always point to the successes
 - Always review your plan.

Focus on...

People naturally follow professionals who are stronger than themselves!

- Become involved on a local, state and national level to see other professionals at work.
- Networking with other professionals is essential.
- When you are respected as a person, you are admired. When you are respected as a friend, you are loved. When you are respected as a leader, you are followed.

Trust is the foundation of professionalism!

- You cannot take shortcuts in your profession, no matter how long you have been in it.
- To build trust, you must exemplify competence, connection and character.
- Character makes trust possible, and trust makes leadership possible. This creates a solid ground for trust.
- Admit your mistakes and learn from them.
- Put what is best for the followers (others) ahead of your own personal agenda.

Who you are is who you attract!

- Check your negative attitude at the door.
- The better leader you are, the better leaders you will attract.
- If you think the people you attract could be better, then it's time for you to improve yourself.
- Be a magnet—attract the professionals.
- It is your job to initiate connection with who you attract.

Professional potential is determined by those closest to you!

- Leaders are not “Lone Rangers”; if you are alone, you are not leading anybody, are you?
- Find greatness in those around you, and help them find it in themselves.

- First, know your own abilities and motivate yourself—then find the abilities in those around you and motivate them.

Secure professionals give power to others!

- Other's capacity to achieve is determined by their leader's ability to empower.
- A weak professional worries that if they help others, they will become dispensable, but in reality it is the only way to be indispensable is by continually empowering others and helping them develop.
- Be prepared for change—it is the price of progress.
- The greater things will happen when you give credit to others.
- Be committed to helping others.

It takes a professional to raise up other professionals!

- Just as it takes a giant killer to produce other giant killers, it takes a leader to raise up other leaders.
- To develop other leaders, you must become a better leader.
- Continue your own development as a professional. Spend time with other leaders.
- Remember it is the team approach—everyone on the team must work together for the team to win.

Professionals understand that action is not necessarily accomplishment!

- Keep prioritizing. We are all accountable to someone so priorities must begin with what is required of you.
- Satisfy multiple priorities with each activity, delegate to others so that you can spend your time in your strength areas.

A professional must give up to go up!

- Make sacrifices to accomplish your

goals.

- Swallow your pride.
- Set an example.
- Sacrifice is an ongoing process, not a one-time payment.
- When you become a leader, you lose the right to think about yourself.
- If you have to give up to go up, then you have to give up even more to stay up.

“For everything you have missed, you have gained something else; and for everything you gain, you lose something.” —Ralph Waldo Emerson



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The Power of Encouraging Words

A Tribute to Mrs. Brenda L. Freeman

By: Edna W. Garza, TBLS-BCP—Civil Trial Law

Most of us, at one time or another, have come across that very *special* person, you know, the College Professor/ Instructor, Attorney, Judge or other legal professional who inspired us to do our best in the legal field. Can you imagine where we would be now without those individuals who were there to guide and support us, offer us encouraging words, or words of wisdom? I wrote this article to pay homage to a very special and unique lady named Mrs. Brenda L. Freeman, a woman who forever changed my life and my professional career path!

My story begins in late 1989 when I hit the lowest point in my young adulthood. As a mother of a beautiful 4-year-old daughter named “Pamela,” I had to think long and hard about my future and how I would provide support for the both of us after my unexpected divorce. I was unemployed and couldn’t find a job because I didn’t have any “work experience,” but I couldn’t get any “work experience” because I couldn’t find a job. No doubt some of you can relate to my situation. Upon the advice of my sister (*and my biggest mentor*) Olga, I enrolled in the Paralegal Program in McAllen, Texas, in January 1990. For those of you not familiar with McAllen, it’s a city located in the Rio Grande Valley, a/k/a “South Texas.”

When I first learned about this new paralegal program (an 18-month night-time paralegal course) being offered at South Texas Vocational Technical School, I had no idea what a Paralegal was. My sister told me that a Paralegal was basi-

cally the right hand of an attorney, sort of what a nurse is to a doctor. She said, “You’ll learn the legal system and you’ll get properly trained to work with attorneys.” Okay—that sounded *very* interesting!

Mrs. Freeman created the first pilot Paralegal program in the Rio Grande Valley. She moved to South Texas in the fall of 1989 when her husband was relocated to McAllen to serve as the Regional District Manager for the Service Merchandise Stores in the Valley. Her first class began on January 7, 1990. She tried to mimic the paralegal program as close to a law school setting as possible. We had a law library in one of the classrooms and, on some occasions, had access to West Law online resources. Mrs. Freeman gave us legal issues to research and we were required to write weekly legal memorandums of law, and yes, we had to “Shepardize” each case law and statute we used in our research. She wanted us to learn how to perform proper legal research and increase our level of legal writing skills. The curriculum was comprised of different areas of law including: *Introduction to Paralegalism; Legal Writing I. & II.; Legal Research I. & II.; Advanced Legal Research; Civil Litigation I. & II.; Torts and Insurance; Real Estate Law; Family Law; Criminal Law; Business Law I. & II.; Law Office Management; Personal Development; and Law Office Simulation; and Business Organizations*. As you can imagine, each course was stressful and intense but, in the end, so worthwhile! Mrs. Freeman wanted us to be fully prepared to go work in a law firm immedi-

ately upon graduation. The initial class of 27 or 28 students was significantly reduced to less than 10 students when the program concluded in July 1991.

What was so amazing about Mrs. Freeman was that she was an attorney licensed in Georgia and Tennessee and was also working on getting licensed in Texas! Her work history resonates very much with what some of us have been through in our past legal work experiences; some of us have been properly trained to be Paralegals while others have learned by working in a law firm and have literally worked themselves up the corporate ladder.

When Mrs. Freeman entered the legal field, she was a legal secretary in a law firm in Atlanta, Georgia. Shortly thereafter, she was promoted to a Paralegal and encouraged by her supervising attorney and the firm partners to go to college and get a degree. Her law firm even worked around her school schedule! Mrs. Freeman finished her college education but the partners still expected more from her. Little did she know that they had a very bright future mapped out for her. The firm partners were so impressed with this highly talented, intelligent and hard-working lady that they sent her to law school in Georgia and paid for all her expenses. She still continued working part-time at her firm while attending law school. Talk about facing hard challenges; being fully dedicated and committed to her studies all the while continuing to work hard at her firm! Despite all the stress, the late nights and weekends studying and doing homework, reading,

Focus on...

doing legal research and everything else in between, she remained focused and alert in her studies. She persevered and got her law degree in no time. Isn't that amazing?

When I met Mrs. Freeman, I was so impressed with the tall, beautiful woman in her late-thirties. She spoke with a very endearing Southern accent- I loved it! She instantly became another one of my mentors, and still is. She was very charming just as you would expect a Southerner to be, and she was smart, funny, successful and obviously very accomplished. However, Mrs. Freeman never let her success go to her head. She remained grounded despite her success. She was a very humble and kind individual. In her personal life, she took great pride in taking care of her husband and her three small children. I thought, *"Wow, this incredible lady really does have it all—a beautiful family and a successful career!"* She was quite the role model and I was/am so proud of her!

A week after the program started, Mrs. Freeman handed back our results to the "Introduction to Paralegalism" exam we had taken at the beginning of the week. I recall that she came up to me and as she handed me my test said, "Edna, you are going to make a very good Paralegal," and walked away. My initial thought was, *"Wow, I must have gotten the highest grade on the exam or something?"* Wrong! I got an 82 grade, or a "B." I never understood why she made that comment to me in front of my classmates or why she didn't compliment anyone else, but her encouraging words made me feel very special and unique. Her confidence in me gave me tremendous hope to continue to do well in my studies. Suddenly my future in the legal profession looked *very* bright!

Although I didn't get the highest grade like I thought, I realize that I got something better- I got encouragement by my Paralegal Instructor who believed in me, which, in turn, caused me to believe in myself! I've heard stories where a student's future success was the result of the "encouraging words" he or she received

from a former teacher or coach. To date, I still recall Mrs. Freeman's encouraging words, especially when things seem difficult or overwhelming at work. She's been my little guiding voice all these years and I've tried to follow in her footsteps.

After twenty-four (24) years of working as a Litigation Paralegal, I sought board certification with the Texas Board of Legal Specialization. I became a Texas Board Certified Paralegal in the area of Civil Trial Law in February 2015. I truly believe that Mrs. Freeman's encouragement helped me get to where I am today. I have no doubt that she would be very proud of my accomplishments and the accomplishments of her other students including Homer M., Linda A., and Felix C., all very successful Paralegals.

Unfortunately, not many Paralegals get recognized for their hard work, dedication, and loyalty these days, nor do they get much encouragement by their supervising attorneys, partners, or colleagues when they do a good job. That's when you have to remain strong and believe in yourself! Remind yourself that you can handle anything and you are doing a great job. If you don't have someone offering you kind words or praising you for your hard work, loyalty and dedication or patting you on the back every now and then like you deserve, don't worry, there are plenty of Members of the State Bar of Texas- Paralegal Division who can provide that support. Being a member of this professional organization (of which I am a very proud member) allows you to meet members who can and will encourage you. As the current Board Director for *District 15*, I get plenty of encouragement and support from our PD President, Mrs. Mona Tucker! Mona - Thank you for your encouragement and support, I appreciate you so much!

Today, I want to encourage all of you to become "People Builders." Tell others just how much you appreciate them or how valuable they are to your firm, and don't be afraid to let your colleagues or other Paralegals in your community know

just how proud you are of their accomplishments. Not only will it make you feel good, it will cause them to turn around and do the same for others who may need encouraging words and support too.

To District 15 Members/Friends and all the other Members of the Paralegal Division, know that you are *all* very special and unique. My encouraging words to you are: "Work smarter, not harder, and remain strong despite any work adversities you may be currently experiencing. Know that YOU *are* making a difference in the legal profession. Continue working diligently on your client files, pay attention to detail, think of case strategies that your attorney may have overlooked (*don't be afraid to think like an attorney!*), be a team player, stay organized, become a stress reliever to your firm and maintain your cool when dealing with rude and obnoxious people. More importantly, stay challenged. Seek board certification if possible. Continue learning and growing every chance you can and encourage others to do the same. Remember, you are all strong and fearless.... You got this!"

And finally, to Mrs. Brenda Freeman wherever you are, *"THANK YOU SO MUCH for all you did for us. Although you may never know just how much my life changed for the better because of you, know that I have enjoyed being a Litigation Paralegal for nearly twenty-seven (27) years. I can't imagine where I would be now had you not created that Paralegal program before moving away... I miss you dearly and I wish you all the best!"*



Edna W. Garza, TBLS-BCP, Civil Trial Law, is a paralegal at Walsh McGurk Cordova Nixon, PLLC, in McAllen. www.wmcnlaw.com.



How To Optimize Your LinkedIn Profile to Highlight Your Achievements

By Emma Hanes and Amanda Ravandi

Long gone are the days when achievements were rewarded with gold stars, but this doesn't mean they aren't important. When it comes to professional achievements, many people are too humble to share their successes, which is a shame. If you have worked hard, you deserve to show off and there's no better place to do that than your LinkedIn profile. LinkedIn is the best place to include your professional updates, especially when it comes to your accomplishments. The social platform even dedicates an entire section of individual profiles for achievements, certifications, and awards. While this section is pretty far down on the page, it is by no means the only place you can feature accomplishments on your profile.

Why You Should Optimize Your LinkedIn Profile To Show Off Your Achievements

In this digital age, a LinkedIn profile is akin to a digital resume and/or business card. Everyone from potential employers to clients use LinkedIn to research individuals online. For individuals looking for employment, properly showcasing your accomplishments helps you stand out from other candidates. If you're not looking for a new position, showcasing your achievements helps improve the overall prestige of your law firm employer. For paralegals working for a company other

than a law firm, showcasing achievements helps you illustrate your own value and work. While lawyers are often eager to showcase their achievements on their website biographies and other digital citations, a law firm's clients often work more closely with paralegals, so your achievements are important too.

It is also incredibly important to regularly update your LinkedIn profile. You wouldn't apply for a job or introduce yourself with a resume that was five years old, so you shouldn't let your LinkedIn profile get out of date either. As your professional career continues to evolve, so should your LinkedIn profile. Regularly update your job title, job duties, certifications, and other sections of your profile to reflect any changes. Set a reminder on your calendar to update your profile quarterly, or twice a year at the very least.

Make Sure You Have The Basics Down

Before you can highlight your achievements on LinkedIn, you need to make sure you have optimized your profile. Only use a high-resolution and professional looking photo for your profile picture. Your photo is often the first thing a user looks for and sees when visiting your LinkedIn profile, so you want to make a good first impression. Be sure to completely fill out your employment history with dates, duties, and responsibilities from each position; and make sure to link up each employ-

ment position to the Company Page for each business. Also include detailed information in your education section, again making sure to link up each school to its designated Company Page. While you don't have to list dates of graduation, adding extra-curricular activities, such as student organizations you participated in, sorority or fraternity memberships, and awards help paint a much brighter picture of your background. Be sure to also include any community involvement or volunteer experience, additional spoken languages, and skills in your profile.

Endorsements highlight your professional success through what is known as social proof. Receiving endorsements from other professionals is a type of verification or proof to the public that you are as skilled and experienced as your profile says you are. Ask coworkers, classmates, or previous employers to endorse the skills you have listed on your LinkedIn profile. This not only makes you look good, but endorsements help legitimize your skill set to future and current connections.

Where To Include Your Achievements

After you have included your achievements in the "Accomplishments" section of your LinkedIn profile, consider adding similar text in a few other locations for maximum effect.

- **Headline**—LinkedIn automatically

Focus on...

generates a headline for users' individual profiles, usually using the current employment position listed. However, users have the ability to edit the headline, and they absolutely should. If you received a certification or award, consider using the phrases "Certified" and "Award Winning" in your headline. You can use several descriptors in your headline and shouldn't be afraid to highlight key achievements and skills. LinkedIn allows users 120 characters for their headline. Your headline should at least be 35 characters, but feel free to use more, targeting between 75 and 100 characters. You don't want to bombard the user with a lengthy headline, but should highlight a few special qualities.

- **Summary**—Under the profile picture and headlines, users are able to include a summary (or biography). Users should include any and all accomplishments in this section; more than just awards and certifications. If you have a particular project or case you are proud of, include it in your summary. This is really the only portion of a LinkedIn profile where users can get a little

personal, and we highly recommend doing so. If having over ten years of experience means something to you, include it in your summary. If you were inspired to become a paralegal by a family member, include it in your summary. If done correctly, this section not only highlights successes, but also personalizes you to the audience.

- **Add Media Under Experience**—The Experience section of a LinkedIn profile allows users to include a plethora of information. Besides the basics such as job title, company, and duties, users can include "Media." LinkedIn allows you to upload or link to external documents, photos, videos, websites, and presentations. If you have a digital link to a certificate or a picture of you accepting an award, add it here. It is important to include accomplishments in this section because it reminds users that these accomplishments were achieved in addition to the duties and responsibilities of your job position.

One Last Tip

Now that you've optimized your LinkedIn profile to highlight your achievements, here's one last tip to take your LinkedIn profile to the next level. When you create a LinkedIn profile, LinkedIn automatically generates a URL for your profile that includes over a dozen random numbers. While this helps LinkedIn identify your profile, it's incredibly messy, and makes it even more difficult for people to find your profile.

Users can actually create a personalized URL for their profile. Once you log into LinkedIn, view your profile, and you will see a link in the right sidebar that says, "Edit Public Profile & URL." This link takes you to a new page where you can personalize the URL for your profile. Change the URL to your first and last name to keep your profile simple and easy to find. It should read something like this: www.linkedin.com/in/YourName. This is much simpler and more professional. Now that you've optimized your profile



and personalized your URL, you can share your accomplishments with the world.

NEW TPJ SECTIONS

- The "100 PD" Club—if your firm has 100% Paralegal Division membership, your firm can be listed as being a part of the "100 PD" Club!
- Memorials Section—Contributions can be made in remembrance of our PD members.

To make a submission for either section, please e-mail tpj@txpd.org for a questionnaire.

Submissions must be made by May 15th.

Thank you for being a PD member!





State Bar of Texas
Paralegal Division



Annual Meeting PARALEGAL DIVISION

**State Bar of Texas
Friday, June 22, 2018
8:00 am – 2:00 pm
Austin Marriott South
4415 S IH 35 – Austin, Texas**

“Operation: Military Legal Support”



Keynote Speaker:
Thomas Palladino
Executive Director of the Texas Veterans Commission
“Veteran Services in Texas”

Plus 3 hours of CLE
Speaker and Topic information:

Texas Secretary of State's office – Webcam Notarizations
Susan Haney with the Haney Law Firm – Estate Planning
Sgt. Major Pickerin with the JAG Office at Fort Hood – Family Law

Registration Fee: \$60 on or before May 28, 2018
Registration is online ONLY @ www.txpd.org
Late Registration \$65 - May 29, 2018 - June 8, 2018
QUESTIONS? Contact Alice Lineberry, @ am@txpd.org

Financial Planning: Helping You See the Big Picture

By Craig Hackler, Financial Advisor, Raymond James Financial Services

Do you picture yourself owning a new home, starting a business, or retiring comfortably? These are a few of the financial goals that may be important to you, and each comes with a price tag attached.

That's where financial planning comes in. Financial planning is a process that can help you target your goals by evaluating your whole financial picture, then outlining strategies that are tailored to your individual needs and available resources.

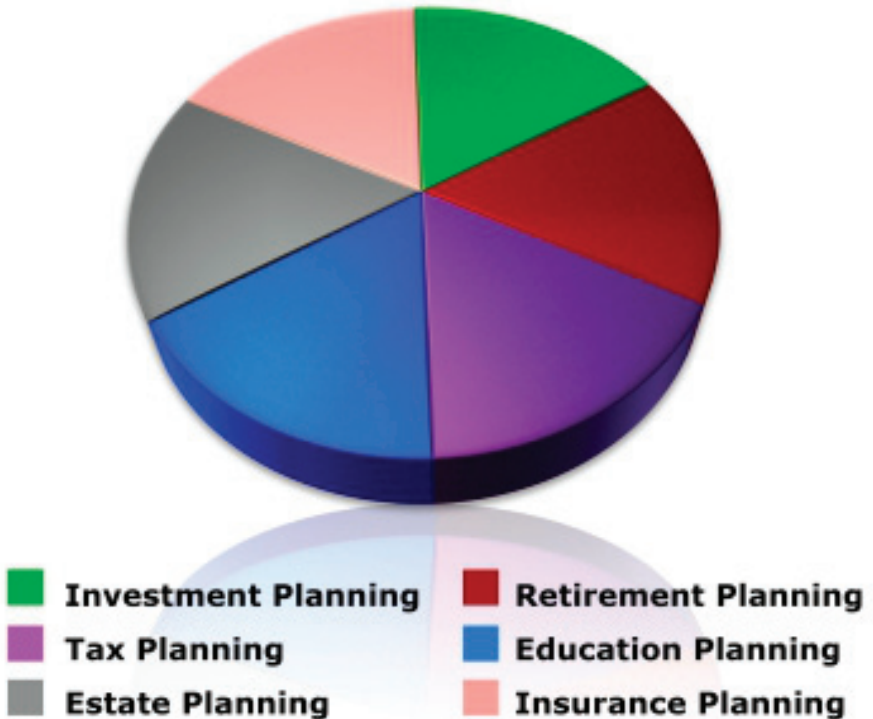
Why is financial planning important?

A comprehensive financial plan serves as a framework for organizing the pieces of your financial picture. With a financial plan in place, you'll be better able to focus on your goals and understand what it will take to reach them.

One of the main benefits of having a financial plan is that it can help you balance competing financial priorities. A financial plan will clearly show you how your financial goals are related—for example, how saving for your children's college education might impact your ability to save for retirement. Then you can use the information you've gleaned to decide how to prioritize your goals, implement specific strategies, and choose suitable products or services. Best of all, you'll know that your financial life is headed in the right direction.

The financial planning process

- Creating and implementing a comprehensive financial plan generally involves working with financial professionals to:
- Develop a clear picture of your current financial situation by reviewing your income, assets, and liabilities, and evaluating your insurance coverage, your investment portfolio, your tax exposure, and your estate plan



- Establish and prioritize financial goals and time frames for achieving these goals
- Implement strategies that address your current financial weaknesses and build on your financial strengths
- Choose specific products and services that are tailored to help meet your financial objectives*
- Monitor your plan, making adjustments as your goals, time frames, or circumstances change

Some members of the team

The financial planning process can involve a number of professionals.

Financial planners typically play a central role in the process, focusing on your overall financial plan, and often coordinating the activities of other professionals who have expertise in specific areas.

Accountants or tax attorneys provide advice on federal and state tax issues.

Estate planning attorneys help you plan your estate and give advice on transferring and managing your assets before and after your death.

Insurance professionals evaluate insurance needs and recommend appropriate products and strategies.

Investment advisors provide advice about investment options and asset allocation, and can help you plan a strategy to manage your investment portfolio.

The most important member of the team, however, is you. Your needs and objectives drive the team, and once you've carefully considered any recommendations, all decisions lie in your hands.

Why can't I do it myself?

You can, if you have enough time and knowledge, but developing a comprehensive financial plan may require expertise in

several areas. A financial professional can give you objective information and help you weigh your alternatives, saving you time and ensuring that all angles of your financial picture are covered.

Staying on track

The financial planning process doesn't end once your initial plan has been created. Your plan should generally be reviewed at least once a year to make sure that it's up-to-date. It's also possible that you'll need to modify your plan due to changes in your personal circumstances or the economy. Here are some of the events that might trigger a review of your financial plan:

- Your goals or time horizons change
- You experience a life-changing event such as marriage, the birth of a child, health problems, or a job loss
- You have a specific or immediate financial planning need (e.g., drafting a will, managing a distribution from a retirement account, paying long-term care expenses)
- Your income or expenses substantially increase or decrease
- Your portfolio hasn't performed as expected

- You're affected by changes to the economy or tax laws

COMMON QUESTIONS ABOUT FINANCIAL PLANNING

What if I'm too busy?

Don't wait until you're in the midst of a financial crisis before beginning the planning process. The sooner you start, the more options you may have.

Is the financial planning process complicated?

Each financial plan is tailored to the needs of the individual, so how complicated the process will be depends on your individual circumstances. But no matter what type of help you need, a financial professional will work hard to make the process as easy as possible, and will gladly answer all of your questions.

What if my spouse and I disagree?

A financial professional is trained to listen to your concerns, identify any underlying issues, and help you find common ground.

Can I still control my own finances?

Financial planning professionals make recommendations, not decisions. You retain control over your finances. Recommendations will be based on your needs, values, goals, and time frames. You decide which recommendations to follow, then work with a financial professional to implement them.



Craig Hackler holds the Series 7 and Series 63 Securities licenses, as well as the Group I Insurance license (life, health, annuities). Through

Raymond James Financial Services, he offers complete financial planning and investment products tailored to the individual needs of his clients. He will gladly answer your questions. Call him at 512.391-0919 or 800.650.9517 or e-mail CraigHackler@RaymondJames.com. Raymond James Financial Services, Inc. 3345 Bee Caves Rd., Suite 208, Austin, TX 78746.

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Tech Hints

At least one thing your other firm members didn't know, and will be glad you did.

By Joseph Jacobson*

Introduction

The first article in a new series is often the most difficult. You and I share uncertainty about the other person's expectation. My goal—until you tell me otherwise—is to provide you with some knowledge you did not have before, and which your firm will find valuable. So, in this column you'll receive information across several topics, any of which would warrant exploration in a separate column. You can help me by writing the *TPJ* Editor at tpj@txpd.org (or me, or both of us) and letting us know what subjects interest you most and which you'd want to see highlighted in the future.

GoogleVoice

If you'd like a free phone number with magic powers, keep reading. Google will give you a phone number. Sure, it gives Google the chance to spy on you and sell your information to others, but a free phone number with magic powers can come in handy. Just go to <https://www.google.com/googlevoice/about.html> and request a telephone number that is Voice Over Internet Protocol (VOIP where the voice comes over your computer or data). You can pick that number with some flexibility about which area code and which

numbers, and people can text you or speak with you. Messaging service options include transcription of voice mail, forwarding the transcribed voice mail to your phone as a text message, putting it in an email and forwarding the email to you, and attaching a mp3 file allowing you to listen to the original message; and, go to a special area of your GV Account and undertake a whole dashboard of options. You can set your GV number to answer on your choice of mobile or landline, or switch between lines, once you answer. The downside is that Google may be listening, but so many other companies and government agencies.

Online Notary

Texas statutes allow for an online notary process to become effective on July 1, 2018. The Secretary of State will recognize a notarization performed electronically, i.e., over an interactive two-way audio *and* video communication that meets the Secretary of State's approval in accordance with the statute. If deemed compliant, as a practical matter, this statute allows a notarization to be taken by a notary and a signatory over Skype, Apple's FaceTime, or Google Hangouts, or other similar technology.

The notary and the signatory who

acknowledges his or her execution of a document can be across the country from each other as the document is notarized. "Personally appeared" will no longer mean "personally appeared in-person."

This convenient option may impress clients and highlight

your interest in saving them time, while establishing your practice as one embracing technology. Your clients will recognize your efforts to prevent trips to your office, and your emphasis on efficiency and workflow. Your practice may find gains in credibility for other procedures.

Make sure you're ready as soon as possible.

Conclusion

We all made it through the first column. Now just one more thing, please. Let Megan Goor, the *TPJ* Editor, tpj@txpd.org and me (joseph@jacobsonlawyer.com) know if you liked this sampling of topics and how many concepts were new to you. If you'd prefer more substantive legal issues and ethics, such as encryption to insure client confidentiality and privilege or more information on substantive areas of the law such as the Computer Fraud and Abuse Act, then let us know as well. If you have specific suggestions, then please forward them.

Be safe in your cyber world and beyond! See you next edition!



Joseph Jacobson has a transaction law practice in the areas of technology, contracts, and commercial real estate. A former

board member of the Japan American Society of Dallas, he's served as Chair of the Computer & Technology Section of the State Bar of Texas, and is Vice Chair of the Privacy, Data Breach, and Ecommerce Committee, and the Blockchain Committee, as well as a member of the Texas Business Organizations Code Committee. Mr. Jacobson was an adjunct professor at Southern Methodist University Dedman Law School. He has analyzed, drafted, and supported legislation in every Texas legislative session for over 20 years. He may be reached at joseph@jacobsonlawyer.com, O: 214-361-1700; Google Voice: 214-659-1357.

Hot "Cites"



What IS Valid Proof of CLE?

By Mary Wintermote (District 2 Director) and Deb Pointer (Membership Chair)

The Paralegal Division requires each renewing Active or Associate member to complete six hours of substantive continuing legal education (including one hour of Ethics) prior to May 31 of the membership year in order to be able to renew their membership.¹ A member can claim two hours of self-study or pro-bono service toward completion of non-ethics CLE or utilize carryover hours from the prior year to meet the requirement. Since the Division migrated to a fully-electronic process for renewal, a member merely selects the claimed CLE hours through information from that member's online CLE repository. If you have kept up with inputting your CLE into the repository as it is earned, the renewal process can take only a few minutes. If not, then the task can become monumental, requiring a member to locate information on CLEs

attended from various sources and recreating a year of CLE.

From those renewals, the Paralegal Division conducts a random audit of 10% of the renewing Active and Associate members each fall.² Those selected for audit are required to submit valid proof of those CLEs listed on the renewal submission. The following are some frequently asked questions from the audit pool regarding proof of CLE:

What is valid proof of CLE? The hard and fast answer is a **Certificate of Attendance** showing the date of the seminar or online course, sponsor of the CLE, hours earned, location of event and signed and dated by a representative of the organization presenting the event. Many times certificates are made available at the CLE by the hosting organization or emailed to you.

In the past few years, those attending the Texas Advanced Paralegal Seminar (TAPS) have received those certificates via e-blast. Attendance certificates issued by the Texas Board of Legal Specialization (TBLS), the National Association of Legal Assistants (NALA) and National Federation of Paralegal Associations (NFPA) are acceptable. A member needs to complete and sign the Certificate of Attendance.

I lost my certificate You may be able to contact the hosting organization and request a duplicate certificate. If no duplicate certificate is available, a letter from the hosting organization confirming your attendance along with the name of the presentation and number of CLE hours received, will be considered valid proof of attendance.

The organization did not provide attendance certificates. In cases where a certificate was not available at the seminar, a letter from the hosting organization confirming your attendance along with the name of the presentation and number of CLE hours received, will be considered valid proof of attendance.



Congratulations

to the 2017 Board Certified Paralegals honored at the Texas Board of Legal Specialization's Annual Induction Ceremony February 23, 2018.



Board Certified Paralegal

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Kathleen L. Emory
Season Renee Gayler
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Melanie Isaac-White
Amie Jackowski
Amy Timberlake
Johnson
Christi A. Lankford

Andrea J. Mitchell
Janis Rivera
Celia M. Rubio
Sally Kris Ryan
Melissa R. Stapleton
Melissa Taylor
Carrie Thompson
Sandy Underwood
Megan Whiteford

CIVIL TRIAL LAW

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Yolanda Garcia
Andrew Liesman
Rose Ouderkirk
Stephanie Perkins
Christina S. Tilotta

CRIMINAL LAW

Amanda Atkeisson
Claudia Hipps

ESTATE PLANNING & PROBATE LAW

Layne Acker
Alicia M. Collier

PERSONAL INJURY TRIAL LAW

Brittany Posadas

REAL ESTATE LAW

Susy Johnson

TBLS inducted 30 paralegal honorees. There are currently only 375 Board Certified Paralegals in Texas, we encourage you to visit tbls-bcp.org and consider joining this elite group.

TBLS offers Board Certification in 8 specialty areas:

- Bankruptcy Law
- Civil Trial
- Criminal Law
- Estate Planning & Probate Law
- Family Law
- Personal Injury Trial Law
- Real Estate Law
- and TBLS just recently added Oil, Gas and Mineral Law

2018 Application filing deadline is June 30, 2018.

APPLY TODAY
TBLS-BCP.COM

The presentation was MCLE approved. While it's true that a member signs in to a MCLE-approved presentation with his or her bar number and the hosting organization generally enters that information into the State Bar's website, the organization should provide a certificate of attendance if requested. The Paralegal Division, at this time, still requires a written certificate of attendance.³

The information is entered in the CLE repository. Why isn't that enough proof? Standing Rule 1.6 specifically states that, in addition to updating CLE hours in the online member repository members should "[keep] copies of all CLE proof of attendance certificates in order to comply efficiently should the member be audited. During a CLE audit, the member would be required to submit CLE certificates upon request." (emphasis added) _

The CLE was offered by the Paralegal Division. Isn't the certificate already on file? No. CLEs may be offered by different districts and events. The Division does not maintain those attendance lists and issued certificates. You will still need to contact the District or Committee holding the CLE for a certificate.

I attended with my attorney and he/she got the certificate. The Paralegal Division does not recognize CLEs where the member claiming credit was not a registered participant.

I sat in on a webinar with others from my office. Absent valid proof of registration and attendance, CLE credit cannot be given.

I have my course materials and notes. This is not valid proof of CLE.

I have my receipt for the class. Proof of payment for a CLE is not acceptable proof of attendance.

Why can't I submit CLEs taken after June 1st if I didn't renew my membership until after the CLE was taken? The Paralegal Division Standing Rules on membership renewals requires that the six hours be completed by May 31st of the membership year. Taking CLEs after May 31st can only be claimed for credit the following membership year.

Another very important thing to keep in mind when designating the CLEs on your renewal application: In the event of an audit, you MUST have the certificates for those items listed on the renewal application. The Audit Ad Hoc Committee cannot provide credit for courses not included on the submitted application. Before designating a CLE on your renewal application, make sure you have the valid proof.

INTRODUCING

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THE PD APP NEEDS YOUR CLE!*



Having membership renewals completely online will mean that you will need to input your CLE online too. Utilizing the Paralegal Division CLE portal is more important than ever! To update your CLE, go to www.txpd.org->Directory->View My CLE Records->Log On to enter your CLE or use the Paralegal Division App! 

bright blue postcard

There will be a  coming your way in the mail in April to notify you to renew your membership only AND THIS **BRIGHT BLUE POSTCARD** WILL BE YOUR ONLY REMINDER TO RENEW your membership starting May 1st. Tack it to your fridge, put it with your bills and/or snap a photo and add it to your smart phone notes or calendar!

(The Paralegal Division App is a web-based app that allows PD members to add the app icon to their homepage on their handheld devices. Once members log on, they will be able to manage their CLE hours on the go, and call up the Texas Paralegal Journal (TPJ) on their handheld devices! To download the app, please click or go to <http://txpd.org/myapp>)

* Upon renewal, all active and associate members should remember when obtaining your six (6) CLE hours that one (1) of those hours will need to be an Ethics CLE obtained by May 31, 2018.

Save the Date!



September 26 - 28, 2018

Register online starting June 1 at www.txpd.org/taps

~ includes 14 hours of CLE, socials, and keynote luncheon ~

Crowne Plaza



Addison, Texas



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

IMPORTANT: ALL APPLICATIONS FOR A SCHOLARSHIP FOR TAPS 2018 MUST BE RECEIVED BY FRIDAY, JULY 20, 2018. DATE OF TAPS 2018: September 26-28, 2018, Addison, Texas.

Name _____ PD Membership No. _____
Home Address _____
Home Telephone _____ Email Address _____
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, TBLS-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



PARALEGAL DIVISION STATE BAR OF TEXAS



BOARD OF DIRECTORS QUARTERLY BOARD MEETING SUMMARY *February 2018*

Submitted by President-Elect, Stephanie R. Sterling, TBLS-BCP

The Paralegal Division Board of Directors is hard at work for you. Here are some interesting highpoints from our last quarterly meeting on February 9th and 10th as well as some membership highlights.

Elections

The Board of Directors has elected the next Executive Committee for 2018–2019 as follows:

President: Stephanie Sterling, TBLS-BCP
President-Elect: Megan Goor, TBLS-BCP
Secretary: Sherie Hollinger, RP, PHP
Treasurer: Javan Johnson, TBLS-BCP, ACP
Parliamentarian: Edna Garza, TBLS-BCP

Annual Meeting 2018 “Operation: Military Legal Support”—Austin, Friday, June 22nd

Network with your fellow paralegals, obtain 3 hours of CLE, learn about veterans services in Texas, and have an excellent lunch all for only \$60. Registration is open and online only [HERE](#)

Speaker and topic lineup as follows:

Texas Secretary of State’s office—Webcam Notarizations
Susan Haney with the Haney Law Firm—Estate Planning
Sgt Major Pickerin with the JAG Office at Fort Hood—Family Law
Keynote Speaker: Thomas Palladino, Executive Director of the Texas Veterans Commission

Membership Renewals

It’s almost that time again. Here are some helpful hints for renewal time:

- Be sure to obtain your 6 CLE hours for the 2018 Renewal Period between June 1, 2017 and May 31, 2018.
- NEW: Obtain 1 hour of ethics credit between June 1, 2017 and May 31, 2018. Your ethics credit cannot count as a self-study hour.
- Enter all your CLE hours online
- Keep your CLE Proof of Attendance Certificates in a safe place to submit if you are audited.
- Remember 2 hours can be counted as self-study.

New Ethics CLE Requirement

In keeping with the Paralegal Division’s vision of empowering paralegals, the Board of Directors passed a new CLE requirement. Effective for the 2017-2018 Renewal Period, all active and associate members will be required to have one (1) hour of the current six (6) hour requirement in ethics by May 31, 2018. **Please note that the 1 hour ethics credit must meet the criteria for approval of continuing education courses as listed in the Standing Rules (see I.I.4.) and cannot be counted as a self-study hour.**

Possible Transitioning of Annual Meeting to TAPS Friday Luncheon

The Board of Directors is considering transitioning our Annual Meeting in June to the TAPS Friday luncheon and would like your feedback and comments. Please take a few moments to take this brief [SURVEY](#).

JUST IN TIME FOR CLE—THE MAGIC OF TAPS 2018

SAVE THE DATE: **September 26-28, 2017** in Addison, Texas.

Hope you can join us for 14 hours of CLE, awesome socials, door prizes, and networking opportunities. Be on the lookout for more details soon!

Board of Directors and Committees

Get to know your Board of Directors and Committee Chairs. We are working to continue the advancement of the paralegal profession.

Pro Bono Records

Did you know that you can track your pro bono hours on the Members

Only section of the website? All you need to do is log in—go to the Members Only section and select “Manage My Pro Bono Records” to input your hours.

e-Group

Are you part of the e-group? This is a membership benefit and such a valuable tool. Be sure to try it out and subscribe to it [HERE](#).

TBLS Helpful Hints Guide

Have you considered sitting for the TBLS certification exam? If so, be sure to obtain the TBLS Helpful Hints Guide under the *Members Only* tab to help you prepare and study for the exam.

Online Store

Get your Paralegal Division logo merchandise at the PD Online Store. TAPS merchandise was recently added to selections. 35th Anniversary merchandise is still available, but only for a limited time.

Digital TPJ

The *Texas Paralegal Journal* (TPJ) is fully digital now, so be sure to read it when the e-blast with the link to access it is sent out to the membership. You can read past print and electronic issues [HERE](#).

Paralegal Pulse

The Paralegal Division’s monthly e-newsletter sent out to the membership on or about the 15th of the month. Did you know that you can access the Paralegal Pulse archives online?

Paralegal Division Blog

Read and subscribe to the PD Blog

Social Media—Follow, Like, Join



PD Announces 2018-2019 President-Elect

Megan Goor, TBLS-BCP
Fort Worth, Texas (District 3)

On February 5, 2018, the Board of Directors announced its election of Megan Goor, TBLS-BCP, as the 2018-2019 President-Elect of the Paralegal Division. Megan is the Senior Paralegal and Office Manager of the Brender Law Firm, located in the medical district of Fort Worth. She has been employed by Art Brender since 1983, after starting a career in the legal field as a legal secretary in 1982 for another law firm. While working for Art Brender, she obtained a B.A. from the University of Texas at Arlington. The Brender Law Firm is a general law practice and her experience includes handling personal injury, product liability, insurance bad faith, criminal, civil rights, probate, medical negligence, mass torts, class actions, sexual harassment, and employment



discrimination cases, state and federal, from intake through trial and appellate litigation, including two cases before the United States Supreme Court, *Watson v. Fort Worth Bank & Trust*, 487 U.S. 977, and *Trevino v. Texas*, 503 U.S. 562. Certification and accomplishments: Board Certified in Personal Injury Trial Law by the Texas Board of Legal Specialization (2008); Paralegal Division Director of District 3 (2012-2015); Fort Worth Paralegal Association Paralegal of the Year Award (2014); Paralegal Division Parliamentarian (2014-2015); President of the Paralegal Division (2016-2017); and appointment by State Bar President Tom Vick to the Texas Legal Services to the Poor in Civil Matters Committee (2017-2020). Megan is a Paralegal Division Ambassador and, as Editor of the *Texas Paralegal Journal*, also serves as the Paralegal Division's Publications Chair. Megan is also a member of the Texas Bar College, Associate Member of the Tarrant County Bar Association, Active Member of the Fort Worth Paralegal Association, and Paralegal Affiliate Member of AAJ.

Even-Numbered District Director Elections and Results of the Paralegal Division 2018 Bylaw Amendments

Submitted by President-Elect, Stephanie Sterling, TBLS-BCP

The Paralegal Division is proud to announce that the following were elected as even-numbered District Directors for the 2018-2022:

District 2 – Eugene Alcalá
District 4 – Francesca Romans, ACP
District 10 – Jennafer Persinger, ACP

District 12 – Lisa Pittman
District 14 – Javan Johnson, ACP, TBLS-BCP
District 16 – Rebecca Lopez

Further, the Paralegal Division Active members voted and approved all four Bylaw Amendments presented during the recent Spring Election. These Bylaw Amendments will become effective on June 21, 2018. Until the new Bylaws are published in June, please visit the Paralegal Division website [HERE](#) to read the amendments.

Paralegal Division 2017–2018 Leadership

Paralegal Division 2017–2018 Board of Directors

On behalf of the Paralegal Division, thank you to each Director who has served on the 2017-2018 Board of Directors. The Directors meet three times a year to perform business-related duties for the Paralegal Division.

Mona Hart Tucker, ACP, President
(Daingerfield)

Stephanie Sterling, TBLS-BCP, President-Elect (Austin)

Sherylyne Hollinger, District 1 Director
(Houston)

Jay M. Williams, TBLS-BCP, District 2 Director (Dallas)

Mary Wintermote, District 3 Director and Secretary (Fort Worth)

Pamela Etie, ACP, PLS, District 4 Director
(Austin)

Susi Boss, District 5 Director (San Antonio)

Vacant, District 6 Director (Lubbock)

Sharla Fowler, CP, District 7 Director
(Amarillo)

Vacant, District 8 Director (Corpus Christi)

Jennifer Barnes, CP, District 10 Director
(Conroe)

Sandra Seutter, District 11 Director
(Midland)

Lisa Pittman, District 12 Director
(Denton)

Javan Johnson, ACP, TBLS-BCP, District 14 Director and Treasurer (Longview)

Edna Garza, TBLS-BCP, District 15 Director and Parliamentarian
(McAllen)

Rebecca Lopez, District 16 Director (El Paso)

Paralegal Division 2017–2018 Ambassadors

As a benefit to the paralegal profession, the Paralegal Division (PD) offers paralegal associations, bar associations and paralegal programs an experienced CLE speaker through its Ambassador Program. The Ambassador Program of the Paralegal Division is made up of past presidents of the Paralegal Division with over 20 years of paralegal experience. Ambassadors are prepared to speak on a variety of topics. They will travel across Texas to present CLE to paralegals (both members and non-members) and distribute information on the Paralegal Division and its many member benefits. These Ambassadors spend many hours preparing, presenting and traveling for the Paralegal Division. The Board of Directors would like to extend its sincere gratitude to each person listed below who is a PD Ambassador. Not only are these Ambassadors past presidents of the Paralegal Division, but they all continue today to lead its cause. Ambassador presentations are requested through the [Request a Speaker](#) link. Please take a moment to get to know the PD Ambassadors by viewing their [photos and bios](#).
Thank You!

Debbie Oaks McBride, Ambassador Chair
(Dallas)

Erica Anderson, ACP (Amarillo)

Michele Boerder, CP, TBLS-BCP (Dallas)

Rhonda Brashears, CP, TBLS-BCP
(Amarillo)

Clara Buckland, CP (El Paso)

Debra Crosby (Austin)

Joncilee Davis, ACP (Dallas)

Patricia Giuliano (San Antonio)

Megan Goor, TBLS-BCP (Fort Worth)

Misti Janes, TBLS-BCP (Austin)

Javan Johnson, ACP, TBLS-BCP
(Longview)

Ellen Lockwood, ACP, RP (San Antonio)

Susan Wilen, RN (San Antonio)

Paralegal Division 2017–2018 Committee Chairpersons

The Paralegal Division is grateful to all of its Committee Chairs listed below who take time from their busy schedules to lead a committee for this organization. Without the work of the Committee Chairs and their volunteer members, the Paralegal Division would not be able to offer the many benefits to its members. Thanks to all of you!

Standing Committees

2018 Annual Meeting — Alice Lineberry,
PLS, CP, Chair (Austin)

Continuing Education, District CLE —
Jennifer Evans, CP, Chair (Houston)

Online CLE/Webinars — Co-Chairs,
Shannon Shaw, CP, (The Woodlands)/
Kara O'Shaughnessy, Co-Chair (Austin)

Elections — Martha Ramirez, TBLS-BCP,
Chair (Edinburg)

Membership — Francesca Romans, ACP,
Chair (Austin)

Professional Development — Donna Lynn
Waldon, Chair (Dallas)

Professional Ethics — Ellen Lockwood,
ACP, RP, Chair (San Antonio)

Public Relations — Erica Anderson, ACP
(Amarillo)

Publications — Megan Goor, TBLS-BCP,
Chair (Fort Worth)

Ad Hoc Committees/Programs

Ambassador Program — Debbie Oaks
McBride, Chair (Dallas)

Blog Coordinator—Cynthia Minchillo, RP
(Dallas)/Melanie Langford, ACP (San
Antonio)

E-Group Policy — Kim McDonald, TBLS-
BCP, Chair (Austin)

e-Newsletter/Paralegal Pulse —Sheila
Posey, TBLS-BCP, Chair (Conroe)

Ethics Handbook — Ellen Lockwood,
ACP, RP, Chair (San Antonio)

Membership Renewals—Spot Audit —
Debra Pointer, Chair (Fort Worth)

Mentor Program Ad Hoc Committee—
Debra Pointer, Chair (Fort Worth)

Pro Bono — Shanna Mello, Chair
(Weatherford)

Procedures Manual—Stephanie Sterling,
TBLS-BCP, Chair (Austin)

TAPS 2018 Planning Committee — Mona
Hart Tucker, ACP, Chair (Daingerfield)

TAPS 2019 Planning Committee —
Stephanie Sterling, TBLS-BCP, Chair
(Austin)

Texas Bar College Membership
Application Review — Jena Parker, CP,
Chair (Fort Worth)

Texas Board of Legal Specialization (TBLS)
Examination - Helpful Hints — Javan
Johnson, ACP, TBLS-BCP, Chair
(Longview)

Vendor/Sustaining Member Liaison —
Susan Davis, TBLS-BCP (Fort Worth)

Website Development Ad-Hoc
Committee—Pamela Etie, ACP, PLS
(Austin)

Representative

Texas Bar College Representative — Jena
Parker, CP, Chair (Fort Worth)

Paralegal Division Coordinator

Paralegal Division Coordinator—Rhonda
Brashears, CP, TBLS-BCP (Amarillo)



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PARALEGAL DIVISION ONLINE STORE



The PD is offering PD products with the 2017 TAPS logo, as well as its traditional logo. There are 35th Anniversary logo products (in Black and White or Bronze) available for a limited time. The Paralegal Division of the State Bar of Texas offers members merchandise to promote the paralegal profession and their membership of the Paralegal Division.

Go to the PD online store today!

<http://www.cafepress.com/paralegaldivision>



*Be a step above the rest –
Join the Paralegal Division
of the State Bar of Texas*

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

Paralegal of the Year Awards

Professional Development News

Perhaps one of the most prestigious recognitions that a paralegal may receive is

the Paralegal of the Year Award from a local association. If your local association sponsors a Paralegal of the Year Award and

recipient is a PD member, please let the Publications Committee know (tpj@txpd.org) for next spring's edition.



Mary Wintermote was awarded the Paralegal of the Year Award by the Fort Worth Paralegal Association. Mary has over 25 years of experience working in the legal field with 16 of those years at her current firm, Cotten Schmidt & Abbott, L.L.P. Affectionately nicknamed “Radar” by her supervising attorney, Mary is known for her uncanny ability to anticipate needs and next steps in complex litigation. Mary demonstrates excellence in the office and in her dedication to her profession and the community. Mary serves as the Secretary, District 3 Director, and as a Board Advisor and Liaison on various division committees for the State Bar of Texas Paralegal Division. Mary also serves as the State Bar of Texas Paralegal Division Chair for the FWPA and regularly volunteers her time with multiple charities.



Susi Boss, of Higdon, Hardy & Zuflacht, was awarded the Paralegal of the Year Award by San Antonio Paralegal Association. Susi also serves as SAPA’s President and is currently the District 5 Director of the Paralegal Division. Susi has been a member of the State Bar of Texas Paralegal Division since 2003 and of the State Bar of Texas Family Law Section since 2012. Susi is a member of both the Texas Bar College since 2009 and the Texas Pro Bono since 2005, as well as the San Antonio Bar Association since 2014, Bexar County Women’s Bar Association & Foundation, Member since 2014, National Association of Legal Assistants—Member since 2006, Community Justice Program Volunteer, San Antonio, and Texas State Bar of Texas Child Protection Law Section, Member 2018. Susi has been married to Russ for 45 years and have 2 children and 5 grandchildren, as well as 3 dogs, numerous country cats and her horse. Susi continues to be very involved in numerous ministries at St. Joseph-Honeycreek Catholic Church.



Maria Sturdy, of Jones and Jones, is the President of the Northeast Texas Association of Paralegals. She graduated from Tyler Junior College with her Associate Degree in Applied Science and Paralegal Studies as Magna Cum Laude. She worked for Michael G. Carroll in Tyler, working in probate and on the defensive side of *personal injury*. In 2013 when Mr. Carroll decided to move his firm to Austin she came back to Longview and went to work for Jones & Jones, switching over to the Plaintiff’s side on personal injury cases and working in employment and labor law. Maria joined the Northeast Texas Association of Paralegals in 2014 and has since served as the first vice president and president for the association. Maria is married to Bill Sturdy. They have five children, nine grandchildren with two more arrivals due this year. When she is not working, she enjoys gardening and looks forward to the annual camping trip they take their grandchildren on each year.

Paralegal Day Events and Awards



District 1

District 1 of the State Bar of Texas Paralegal Division and Houston Metropolitan Paralegal Association (HMPA) jointly celebrated the Texas Paralegal Day at Tony's Mexican Restaurant on October 23rd and was generously sponsored by Tony's Mexican Restaurant, Kim Tindall & Associates and Copy Source 1. The social event was originally scheduled to be held at Birraporetti's in Downtown Houston, which was severely damaged due to flooding from Hurricane Harvey. Renovations at Birraporetti's were not complete 5 days before the social event, so Tony's Mexican Restaurant graciously moved the social event to their location. There were approximately 45 people in attendance, including students from the University of Houston and Houston Community College.



Awards: The 2017 HMPA Paralegal of the Year winner is PD member, **Rochelle Pleasant, ACP**, of TOTAL Gas & Power North America, Inc. Rochelle was presented with an engraved award and a check in the amount of \$250.00 at the January 9, 2018 CLE Luncheon.

District 2

District 2, in conjunction with Dallas Area Paralegal Association, J. L. Turner Legal Association, and North Texas Paralegal Association held its 2017 Texas Paralegal Day Celebration at the Belo Mansion, in Dallas, on October 23rd. PD President Mona Hart attended and Rob Crain, President—Dallas Bar Association, was the Keynote Speaker.

Awards: **Melissa Leslie**, TBLS-BCP, of Koons Fuller, P.C., received Dallas Area Paralegal Association's Paralegal of the Year Award; **Mariela Evora Cawthon, CP**, TBLS-BCP, of Lynn, Tillotson, Pinker & Cox LLP, received the President's Award for 2017; and **Katina Whitefield**, of Mahomes Bolden PC, received the NFPA Paralegal of the Year Award.



District 3

The D3 Paralegal Day luncheon took place at Pappadeaux Restaurant in Fort Worth. There were 63 attending paralegals and guests. Chad Baruch from the Johnston Tobey Baruch law firm presented "Chameleon Legal Writing: How to Write to Your Reader." Through the generosity of our vendors and sponsors, there were several door prizes as well as goodie bags for each attendee.

Awards: **Doris Jackson**, works for





William S. Harris, Attorney at Law, and was awarded the Tarrant County Bar Foundation's TVAS Paralegal Volunteer Pro-Bono Award; the Volunteer of the Year Award was given to Jessica Amyett, of Ben E. Keith Co.; Katrina Lea, of Burlington Northern Santa Fe, received the inaugural FWPA Pro Bono Service Award; and Mary

Wintermote, Cotten Schmidt & Abbott, L.L.P., was named the 2017 Paralegal of the Year.

District 4

District 4 and the Capital Area Paralegal Association (CAPA) co-hosted a Texas Paralegal Day Celebration ON October 26, 2017, at Sterling Events Center in Austin. There was a cocktail reception, and the keynote speaker was The Honorable Darlene Byrne, Judge of the 126th Civil District Court of Travis County. District 4 Director Pam Etie and PD Membership Chair Francesca Romans provided a history of Texas Paralegal Day and discussed the importance of membership in the PD and the local association. A raffle for a \$100.00 gift card was held to benefit Austin Disaster Relief, and raffle sales produced over \$300.00 for that cause.



Awards: CAPA presented its 2017 Paralegal of the Year Award to **Brittany Posadas**, of Chamberlain McHaney, and **Carli Collins**, of Susan L. Florence & Associates, recently

received the Allstate Litigation Services Distinguished Performance Award for 2017 by her employer.

District 5

This year's 14th Annual Event, "The Legal Profession; Where We Are Now and Where Will We Be in 10 Years" was held on October 27, 2017. We were honored with a Proclamation from the City of San Antonio for our event. Awards were given for Outstanding Community Justice Program volunteers, as well as great Sustaining Member booths (12); lots of drawings with a Grand Prize of \$500.00. Approximately 180 paralegals, judges and attorneys were in attendance. The guest speaker was Mr. G. Thomas Vick, Jr., President of the State Bar of Texas. **Award:** **Susi Boss**, of Higdon, Hardy & Zuflacht, was awarded San Antonio Paralegal Association's Paralegal of the Year.



District 7

District 7 had a wonderful social event for Paralegal Day last night at the Imperial Taproom in Canyon, Texas. The attendees enjoyed wonderful food and most importantly, fellowship among fellow paralegals!



District 11

District 11 celebrated Paralegal Day with a joint CLE and luncheon with the Midland County Bar Association and the Paralegal Association of the Permian Basin. The celebration took place at the Midland Country Club and was attended by approximately 200 members of the local legal community. The Honorable Andrew S. Hanen, U.S. District Judge for the Southern District of Texas, was the speaker.



District 12

District 12 members joined the Denton County Paralegal Association for its Texas Paralegal Day 2017 Happy Hour Mixer on November 2nd at the East Side Social Club.

District 14

Tyler Area Association of Legal Professionals (TAALP) celebrated Paralegal Day October 12 at Clear Springs Restaurant in Tyler. Attorney Robert Wilson spoke on Client Interviews. The District 14 director presented the proclamation of Paralegal Day and door prizes were given out. **Award: Ann Kuhn, CP**, of Wilson, Robertson & Cornelius, P.C., is the recipient of the TAALP Legal Professional of the Year award.

Northeast Texas Association of Paralegals (NTAP) celebrated Paralegal Day on October 18 at Café Barron's in Longview. Judge Alphonso Charles of the 124th District Court, Gregg County made a presentation on Ethics. The District 14 director presented the proclamation of Paralegal Day and door prizes were given out. **Award: Maria Sturdy**, of Jones and Jones, was voted 2017 Paralegal of the Year.

District 15

District 15 held its "3rd Annual Paralegal Day Celebration/Member Appreciation Social" on October 26, 2017 at Arturo's Bar & Grill in Weslaco. Two vendors (File & Serve Xpress and Reporting USA) donated 2 - \$50 door prizes which were won by Lisa Dallas and Carmen Antol.



District 16

District 16 celebrated Texas Paralegal Day and honored past Presidents of El Paso Paralegal Association and 120th District Court Judge, Maria Salas-Mendoza, at its half-day seminar, "Paralegal Tips for a Successful Litigation," on October 19th. Entry Fee was a toiletry donation for El Paso Paralegal Association's Charity: Opportunity Center for the Homeless.



PD Members Who Passed the 2017 Texas Board of Legal Specialization Examination

Congratulations to the following members of the Paralegal Division who successfully completed the 2017 Texas Board of Legal Specialization Examinations.

Estate Planning & Probate
Layne Acker (D4)
Hopper Mikeska, PLLC, Austin

Alicia Collier (D2)
Calloway, Norris, Burdette & Weber,
PLLC, Dallas

Criminal
Amanda Atkeisson (D14)
The Law Office of Michael J. Crawford,
Corsicana

Claudia Hipps (D1)
Scheiner Law Group, P.C., Houston

Civil Trial
Carmen Antol (D15)
Jones, Galligan, Key & Lozano, LLP,
Weslaco

Yolanda Garcia (D16)
Kemp Smith, LLP, El Paso

Andrew Liesman (D15)
Thornton, Biechlin, Reynolds & Guerra,
L.C., McAllen

Rose Ouder Kirk (D15)
Jones, Galligan, Key & Lozano, LLP,
Weslaco

Stephanie Perkins (D12)
Carson Steinbauer, Plano

Christina Tilotta (D1)
Abraham, Watkins, Nichols, Sorrels,
Agosto & Aziz, Houston

Family
Nancy Demmer (D4)
Law Office of Tim Whitten, P.C., Austin

Kathleen Emory (D4)
Barrett, Coble and Andrae, PLLC, Austin

Glyn Griffith (D12)
Koons Fuller, P.C., Plano

Melanie Isaac-White (D2)
Goranson Bain, PLLC, Dallas

Amy Jackowski (D3)
Bailey & Galyen, Bedford

Amy Timberlake Johnson (D3)
Palmer and Manuel, LLP, Dallas

Christi Lankford (D5)
Law Office of Cheryl L. Wilson, San
Antonio

Andrea Mitchell (D3)
Koons Fuller, P.C., Southlake

Janis Rivera (D5)
Bandoske, Butler & Reuter PLLC, San
Antonio

Sally Ryan (D2)
Law Offices of Jennifer S. Goldman, PLLC,
Dallas

Melissa Stapleton (D2)
Duffee + Eitzen, LLP, Dallas

Melissa Taylor (D4)
Kirker|Davis, Austin

Carrie Thompson (D2)
Ackels & Ackels, LLP, Dallas

Sandy Underwood (D2)
Koons Fuller, P.C., Plano

Megan Whiteford (D4)
Law Office of Mark D. Swanson, Austin

Personal Injury Trial
Brittany Posadas (D4)
Chamberlain McHaney, Austin

Real Estate
Susy Johnson (D3)
The Woodmont Company, Fort Worth

PD Members Who Recently Became Registered Paralegals by National Federation of Paralegal Associations (NFPA)

Wayne Baker, RP (D3)
The Hyde Law Firm, Granbury

Esteban Martinez, CRP, RP (D1)
Crain Caton & James, Houston

Joyce Rehill, RP (D3)
Bonds Ellis Eppich Schafer Jones LLP, Fort
Worth

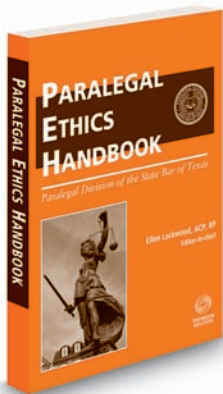
Misty Hicks, CRP (D2)
Mesquite

Nikita Glass, CRP (D4)
Byrd Davis Alden & Henrichson, LLP,
Austin

PD Members Who Recently Became Certified Paralegals by The National Association of Legal Assistants (NALA)

Jesenia Morales, CP (D11)
Cotton, Bledsoe, Tighe & Dawson, P.C.,
Midland

Leslie Johnson, CP (D11)
Cotton, Bledsoe, Tighe & Dawson, P.C.,
Midland



The Paralegal Ethics Handbook, 2017 ed.

By Ellen Lockwood, Laurie L. Borski, Rhonda J. Brashears, Debra Crosby, Javan Johnson, Lisa Sprinkle

This handbook is an essential resource for experienced paralegals, those new to the profession, and the attorneys working with them.

The Paralegal Ethics Handbook is a resource for all paralegals that addresses ethical considerations for 17 practice areas, as well as considerations for in-house, corporate, freelance, administrative, governmental, and regulatory law paralegals. This title:

- Examines topics such as defining ethics, ethical obligations, and remaining ethical
- Addresses ethical considerations for e-filing, e-discovery, and technology
- Provides resources for state information and paralegal association ethics canons, plus related information
- Contains rules and regulations for all 50 states and Washington, D.C
- Explains how to determine whether an action may be an ethical violation

Features & Benefits:

Format:Book - softbound

Components:Print1

Pages:324

Print Product Number:40638127

Print Price: \$110.00

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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
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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 under "Membership" tab. All applications are accepted and processed online at 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.

A Division with Vision... Empowering Paralegals!