

Texas Paralegal Journal
TPJ

TEXAS ADVANCED PARALEGAL SEMINAR



SPRING 2023
NO. 4 | VOL 28

“Over the years, you all have made my work so much easier, and have actually made me look good to the firm. It has been my pleasure to know and work with each of you. You are all dedicated and represent a fine company.”

- Michael M. — Dallas, TX

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Outgoing President’s Message

Texas Advanced Paralegal Seminar
Spring 2023

President’s MESSAGE

With my term as your President coming to an end, I am honored to have served the PD and our members. I must thank my incredible Board of Directors, President-Elect Joncilee Miller and PD Coordinator Rhonda Brashears without whom I could not have led the charge to accomplish all that we have during my term. I also would like to thank all of the volunteers for their time, efforts and dedication to the PD and its members. I would be remiss if I didn’t thank my boss, Richard Hayes, and our firm, including my fellow paralegals, for all of the support that they have given me during this very busy year.

We have continued working with TLAP to spread the word of assistance available to attorneys in need of help with mental health or substance issues and hopefully in the near future assistance for paralegals and legal assistants in need of help. For more information on the program there is a hyperlink button on the PD website.

I had the privilege of traveling on the annual PD trip to the Loire Valley and Paris, France. We had 21 travelers on this first trip post-COVID, and the travelers – some seasoned and some new (me included) had a wonderful time.

Mark your calendars!! I Spy CLE - TAPS 2023 will be September 27-29, 2023, in Frisco, Texas. This is a new venue, and we are very excited about the hotel and conference center space.



Lisa Pittman

The TAPS Committee is working tirelessly to make sure that we have great speakers and socials. I can’t wait to see the inventive costumes of the attendees.

Your President Joncilee Miller and her President Elect Alice Lineberry have some very exciting plans for their terms! Can’t wait to see the next chapters of the PD under their leadership.

Thank you to all the members, volunteers, vendors, and attorneys that support the PD.

Lastly, you all know that I end my President’s Message with:

PLEASE DON’T FORGET TO SAVE YOUR CLE CERTIFICATES!

You will need your CLE Certificates if you are audited.

Lisa Pittman,
Immediate Past President
2022-2023

Editor's NOTE

Paralegal Division members, I hope you are finding enjoyable ways to enjoy this summer heat. The spring edition of the Texas Paralegal Journal is when we take the time to recognize our outgoing board of directors and the last fiscal year committee chairs. These wonderful professionals are what make the Paralegal Division great! Were it not for these volunteers who serve the Paralegal Division, it would not be the 40 plus year association that it is today.

We also use this time to regocognize some deserving Paralegal Division members from around the state who have received awards with other associations. Congradulations to all of them.

Take the time to review this issue as you will find some very interesting articles and the TAPS 2023 brochure. If you have not registered yet, take a look and get that registration done. It is going to be a great event!

Finally, you will find information on your NEW board of directors and committee chairs. We welcome them to their positions and know they will serve you well in 2023-2024.

Best,

Rhonda J. Brashears,
CP, TBLS-BCP
TPJ Editor



Rhonda J. Brashears

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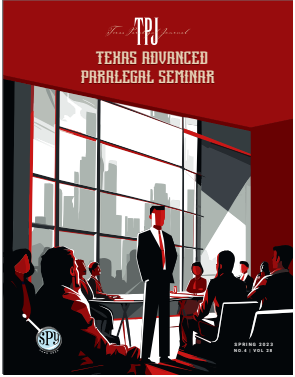
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Deadline for the Fall Issue is September 5, 2023.

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APR 12-20, 2024

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Be a Part of the Path to Professionalism

We are the first paralegal association which is a division of a state bar association. We strive to provide our members with excellent member benefits, networking through state-wide and local events, social networking opportunities. We also work very hard to make our presence known throughout Texas with pro bono connections, involvement in many State Bar of Texas committees, and community involvement.

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Healthy Habits to Support Your Journey OF Well-Being

Texas Advanced Paralegal Seminar
Spring 2023

HEALTHY HABITS TO SUPPORT YOUR JOURNEY OF WELL-BEING

ERICA GRIGG, JD, MEd

Director, Texas Lawyers' Assistance Program



ERICA GRIGG

Since receiving her JD from The University of Texas School of Law and her law license in 2001, Erica Grigg has gained work experience as a criminal prosecutor; general counsel in the Texas Legislature; Special Assistant to the Chancellor of Texas Tech University; and as a personal injury, civil rights, and wrongful death litigator at Spivey & Grigg, LLP. She has appeared on HLN and CNN for commentary regarding her involvement in high-profile civil rights cases. Erica is presently received her master's in Clinical Mental Health in 2022. She recently stepped down as Director at the Texas Lawyers' Assistance Program where she helps connect judges, lawyers, and law students to the mental health and substance abuse recovery resources they need. Erica attended the 2018 Academy Awards for her role as plaintiff's counsel in an Oscar nominated HBO short documentary, *Traffic Stop*.

This paper will highlight four healthy habits that can help make a great foundation for wellness and resilience-building for professionals:

1. Sleep
2. Physical activity
3. Nutrition
4. Connection
5. Conclusion

These are certainly not the only healthy habits that contribute to overall wellness, but research shows that a commitment to these fundamentals can greatly increase our ability to rebound from challenges and help us process the stress and anxiety we experience in our lives in a healthy way.

1. SLEEP

It is common when we think of improving our health to think first about food nutrition and exercise, both which will be addressed subsequently in this paper. Without question, both are critical to our overall physical health. Arguably even

more critical to our physical health, however, is getting an appropriate amount of sleep.

Research shows that getting enough sleep and in particular having a consistent sleep routine can make all the difference in the world where our mental and physical health is concerned. We have to be asleep for at least a few hours before our bodies are cued to release proteins and hormones into our bloodstream that help repair and restore us from the emotional and physical stresses of the previous day (Van Der Helm, 2012). These same proteins also help fortify our immune system and protect us from potential health compromising ailments. When we continue a pattern of skipping out on sleep, we prevent our bodies and minds from healing. This can be devastating on our overall health and wellness exposing us to illness, burnout, anxiety, and depression.

The good news is, there are simple strategies we can implement in our daily lives that can help us get an adequate amount of sleep (8-10 hours for an adult) and also improve our sleep quality (National Sleep Foundation, 2019). Here are three suggestions to implement to improve your sleeping habits.

- a) Be consistent.
Try establishing a consistent wake time and bedtime. Our bodies love routine. If we consistently wake-up and go to sleep around the same time daily, our internal clock picks up on the pattern and will begin to prime itself accordingly. Studies show that people who practice regular sleep schedules feel 56% more rested than those who do not (National Sleep Foundation, 2019).

- b) Create a pre-sleep ritual.
Again, our bodies crave routine. Engaging in a relaxing activity, regularly, right before bedtime can do wonders in getting us in the right frame of mind for a great sleep. Examples of pre-sleep activities: warm bath, knitting, gratitude journaling, or meditation.

- c) Put away devices.
Try putting away your technological devices at least an hour before bedtime. Smart phones, laptops, and other electronic devices we use emit blue light. This blue light tricks our brain into thinking that it is still daytime, even at nighttime. Seeing blue light prevents our bodies from releasing the hormone, melatonin, which helps us to become sleepy (National Sleep Foundation, 2019). When we stop looking at our devices before bedtime, we enable our body to ready itself for restorative sleep naturally. This helps us fall asleep faster and stay asleep longer.

2. PHYSICAL ACTIVITY

The benefits that exercise provides for our mental health is well researched and documented. Moving our bodies helps us release stress and enables our bodies to produce proteins and hormones that protect and fortify our immune system. Although most of us understand that exercise is good for us, starting an exercise routine can feel like an overwhelming commitment. We tell ourselves we are too busy or we are too tired. We also may have preconceived ideas of what an exercise routine looks like running twenty miles a day or three hours at the gym daily. If you have the time and stamina to commit to that kind of physical health routine, wonderful. If you do not, good news: Research

shows that even 20 minutes a day of moderate physical exercise can result in substantial health benefits (HelpGuide, 2019). A challenge for busy professionals, such as lawyers and legal professionals, is simply getting started. Here are some ways that may help starting and maintaining an exercise routine more realistic.

- a) Think baby steps.
As highly motivated professionals, we tend to have a “go big, or go home” mentality. This can serve us well in the courtroom and in the office. That same mentality, however, can keep us from entertaining an exercise regimen. When we think about physical activity in this manner, we can fall into a frame of thinking that if we are not competing in the Boston Marathon, then we cannot call what we are doing exercise. Approaching the idea of engaging in physical activity in a more mentally manageable way can help us stay motivated (HelpGuide, 2019). You may be familiar with the saying, “eat the elephant one bite at a time” being used when describing how to attack a seemingly insurmountable challenge. The same perspective can be applied toward investing in physical activity. If you decide to implement an exercise routine, start with manageable and realistic goals. Walk around the block a few times a day. Try a 10-minute morning stretch combination. Remember lasting changes do not come over night.

- b) Cut yourself some slack.
Some days are going to be “blah” days. We all know that life happens and there are times where we simply do not feel like exercising. This does not indicate weakness,

this indicates that we are normal (Polizzi, 2019). When we encounter a “blah” day, try to hold off on cancelling your workout plans in the morning. Wait to see if you feel better later in the day. If your day does not improve, try being creative about fitting in some physical activity in your day: walk to lunch or take the stairs (HelpGuide, 2019).

- c) Visualize success.
Studies show that if we can picture ourselves succeeding the odds of us doing so increases (Polizzi, 2019). Think about why better physical health is important to you. Are you wanting to live a longer life so you can see your grandchildren grow up? Have you always wanted to hike the Blue Ridge Trail? Visualize yourself doing so and write down what that looks like in a journal or somewhere. When “blah” days come around, conjure these visions and refer to this journal for motivation.
- d) Set realistic goals.
Sure, most of us would love to be on the cover of Health and Fitness magazine one week into our fitness journey, but Rome was not built in a day. An effective way to stay committed to a physical health routine is to set realistic goals for oneself. A great way to do this is a process called “chunking” (HelpGuide, 2019). Chunking is breaking down whatever task you have before you into manageable segments. Some of us already do this in our professional practices. When we have an important brief due in a week, we commit to write four pages a day. This can be a great strategy for exercising too. If committing to exercising an hour

straight through, tell yourself you will exercise for five minutes then see how you feel. If you feel alright after five minutes, commit to another five. Chunking our exercise regimens can help the process feel doable and helps us stay motivated (HelpGuide, 2019).

- e) Schedule it.
We are in a demanding profession, have families, and have other responsibilities that fill our day. Actually setting time aside for physical activity on our calendar increases the likelihood that we will get it done (Polizzi, 2019). Our lives are hectic and it is easy to get distracted or simply forget to fit in physical activity. Scheduling time for physical activity, just as we would a doctor’s appointment, in our smartphones and on our written calendars is a great way to ensure that physical activity will become a habit.
- f) Partner up.
Research shows us that having a workout partner helps with accountability and motivation (HelpGuide, 2019). We are not all feeling motivated at the same time. When we are not feeling like engaging in physical our activity, most times our workout partner is. This can motivate us to show up for our partner and exercise anyway.

3. NUTRITION

Another habit lawyers and legal professionals can employ for overall better mental health is paying attention to what we are putting into our bodies for nourishment. In a world where fast food abounds and lawyers are so short on time, it is easy to make food choices that are not very helpful for our brain or body. There is plenty

of research out there recommending what types of foods are better for our physical and mental health, but many find it most challenging to actually begin to make better choices. Good news, there are strategies we can implement that can help us start our path to better nutrition.

- a) Baby steps.
Similar to tackling the beast of exercise, think baby steps. Studies show that people who make gradual changes with their nutritional choices are more likely to be successful long term (HelpGuide, 2019). So, instead of changing your entire way of eating overnight, maybe start with choosing water over soda a few days a week.
- b) Meal planning.
Another strategy that can help us make better food choices is, meal planning. Meal planning comes in many forms. One way to meal plan is looking at a menu online and deciding what you will order before you go to a restaurant (HelpGuide, 2019). Research shows if we go out to eat with our mind already made up, the temptations that accompany of time pressure, savory smells and sumptuous descriptions are less apt to get us to stray from more reasonable meal choices.

- c) Eat beforehand.
Our busy lives are filled with parties, happy hours, and celebratory events. While these can be fun, they can also be a minefield for those trying to make better nutritional choices. If you have advanced warning that a happy hour adorned with scrumptious, cheesy, fried happy hour accoutrements is heading

your way, try eating a few of your favorite healthier snacks before you go (HelpGuide, 2019). Arriving to your happy hour feeling satiated may help you avoid the triple stuffed bacon cheesy bites.

d) Prepare your environment.

To the extent that we can, controlling what we store in our refrigerators and cupboards can help us commit to better nutrition. If our freezers are full of ice cream, when midnight strikes and we are feeling the urge to snack, if ice cream is there, well ice cream is probably what will be consumed. If we make an effort to keep better food choices at our finger tips, we will reach for those at midnight or maybe not choose to midnight snack at all.

e) Prepare when you travel.

We are constantly on the move. We are in airports and away from home frequently. Traveling makes nutritious choices even more challenging. A strategy that can help us be healthier when we travel is researching before we go (HelpGuide, 2019). Before you leave, Google where you are staying. Take note if there is a grocery store or restaurant nearby where you could make a quick stop for healthy snacks or healthy meal. The more prepared we are for a new environment, the better choices we tend to make.

f) Make it easier on yourself.

Another strategy that can help one reign in what foods are in our environment is to indulge in grocery delivery services, or curbside pick-up. Studies show that doing our shopping via an app or computer can help keep us from making impulse purchases.

When we take the sights and smells away from our shopping experience, it is more likely that we will stick to our preconceived shopping list, and less likely we will throw that unlisted package of cookies in our basket.

4. CONNECTION

While most of us understand the importance that both physical health and nutrition is to our wellness, we often do not realize how important connection to others is when it comes to staying mentally healthy. When we isolate or keep ourselves from being around others, however, the consequences can actually be devastating. With the workload and responsibilities we harbor as attorneys and legal professionals, it can be tempting to shut ourselves away for extended periods of time to get that brief finished or prepare for a deposition. While this is unavoidable occasionally, when isolating becomes a habit it can take a toll on our mental wellbeing. Studies show that when we isolate: we begin to lose our social skills; we start to overshare; we become less collaborative; and it can lead to (Cassens-Weiss, 2018). Below are a few ways we can make sure that we are getting the connection we need to stay healthy (National Alliance on Mental Illness, 2016).

a) Make eye contact.

If we think about it, when we were infants how we knew we were safe, loved, and cared for was through reading the facial expressions of our caretakers. Before we knew how to speak, we were getting cues that we things were going to be ok merely by looking into our mother's eyes. While communicating with someone verbally and hearing someone's supportive verbal response when we share about a difficulty we are having, research

shows that also seeing the reaction of the person with whom we are sharing our news releases a unique set of endorphins soothing us in a way that merely verbal communication does not (Center for Disease Control, 2020). Talking about how we are doing over the phone is helpful, but sharing in person or via video chat is even better.

b) Designate your space.

Designating your space means making sure that if we have allowed a space in our home, never intended to become part of our workplace, to return it to its original intended purpose. For example, now that many of us are working from home, some of us may use what once was only our dining table as our work desks. While this is a resourceful use of limited space, it is also a visual and literal way our work lives can begin to take over our personal lives. With our laptops and work files so accessible to us at home, it is easy to sit down at the dining table thinking we will just check on "one thing" only to find ourselves still in front of our laptops an hour later because we have gone inevitably gone down an email rabbit trail. A way to help avoid this trap and stay connected to our families when we are at home is to close our laptops, put those work files in a box, and store them somewhere else at the end of your workday. Thus, returning your dining table to its intended purpose, a place where you can gather and connect with your family. With our work accoutrement less accessible to us, we are less likely to reengage in work responsibilities and more likely to stay present in our personal life.



c) Help others.

Our profession is built on a foundation of helping others. It is what we do. Being a part of a profession that is purposeful and helps others is why many of us decided to be lawyers. Tapping into that motivation outside of work can be a tremendous boost to our mental wellbeing. Research shows that when we are helping others our self-esteem improves, we feel needed, and we feel purposeful (National Alliance on Mental Illness, 2016). A 2016 study from the Psychosomatic Medicine: Journal of Behavioral Medicine involved scientists researching how our brains reacted when we help others. These scientists

learned that our brains' pleasure center lights up when we are actively helping someone else (National Alliance on Mental Illness, 2016). This means that when we are helping others, our bodies are releasing endorphins into our system that help restore our minds and bodies, not to mention make us feel good.

anxious, drained, tired, and burned out. The good news is that small steps and incremental changes to our daily routine can drastically improve the way we are feeling and help build our resilience to the stresses that come our way. Simply implementing just one or two of the strategies mentioned above can get you on your way to wellness, or bolster the great practices you may already be doing.

5. CONCLUSION

In a profession that is extremely demanding of our time and energy, it can be a challenge to maintain our wellness, physical or mental. Our professional responsibilities coupled with the responsibilities of our personal lives can leave us feeling

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“CERTIFIED” CONFUSION: KNOWING THE DIFFERENCES BETWEEN CertiFIED AND CertiFICATE

Experience, knowledge, and credentials of paralegals and legal assistants are obtained in an exorbitant number of ways. If you google “How to Become a Paralegal,” prepare to be inundated with pages and pages of advertisements for online programs, ABA-approved courses, paralegal certificate programs, and so on and so forth. You will find one-year “certification” programs, online “certified” paralegal tracks from notable colleges and universities, two-year paralegal degree curriculums, etc. As wonderful and time friendly as these programs appear (and make no mistake, some of them are excellent programs), it is important to know and understand just what credentials you will earn upon their completion.

Surprisingly, completion of a paralegal program is not required to become a paralegal, nor is one always required to take a paralegal certification exam. Many legal professionals in the industry have just acquired extensive knowledge through many years of experience. Others attain paralegal degrees which are typically from a two-year program offered in community colleges. Although these degrees take longer to complete than most certificate programs, they still do not award the recipient a “certificate” nor the title of “certified” paralegal.

So, what exactly is the difference between CertiFIED, and CertiFICATE of Completion?

According to Janis Walter, J.D., Professor Emeritus and former Paralegal Program Coordinator, University of Cincinnati, certificated and certified are two very distinct credentials for paralegals and the two terms are not interchangeable. (Walter 2021) A “CERTIFICATE” is just that, a Certificate of Completion. Most paralegal education programs offered through a two-year or four-year school, or a vocational school are completable in under a year. These programs often offer a Certificate of Completion once you have taken all of the necessary courses. Generally, there is no final “certification” exam despite taken exams within and throughout each of the required courses.

Although many of these programs are affordable and fast, they often only offer a basic understanding of paralegal duties and responsibilities. Do not let this information deter you from choosing a paralegal certificate program. But keep in mind that you will benefit immensely from continuing legal education courses.

A “CERTIFIED” paralegal is one who has taken and passed an approved certification exam offered through one of the following FOUR organizations:

- National Association of Legal Assistants (NALA) <https://nala.org/>
- American Alliance of Paralegals Inc. (AAP) <https://aapipara.org/>
- National Federation of Paralegal Associations (NFPA) <https://www.paralegals.org/>
- National Association for Legal Support Professionals (NALS) (formerly The Association for Legal Professionals) <https://www.nals.org/>

These organizations collectively offer six different types of paralegal certification including:

- Certified Paralegal (CP)
- Advanced Certified Paralegal (ACP)
- Professional Paralegal (PP)
- Accredited Legal Professional (ALP)
- Professional Legal Secretary/ Certified Legal Professional (PLS/CLP)
- Legal Document Assistant (LDA)

**Indeed Editorial Team 2022*

Additionally, some state bar associations offer Board Certification exams for paralegals.

Beside each exam is a title suffix earned by each individual who successfully passes the respective certification exam. Further details on listing credentials will follow. Typically, these exams require that the examinee already have extensive knowledge and work experience as a prerequisite. Although each exam may vary as to substance, one commonality is that each exam contains a number of varying legal topics. For example, the Certified Paralegal (CP) exam offered through NALA has two parts: Knowledge and Skills. The Knowledge portion of the exam contains topics that vary from the United States Legal System to specific areas of law such as Corporate/Commercial Law. (NALA 2023) The Professional Paralegal (PP) exam available through NALS is divided into four parts, two of them being communication and procedural skills and professionalism.

What’s the big deal if I call myself “certified?”

Similar to other respected professions with identifying credentials, it is important in the legal profession to maintain the value of titled credentials. Employees who take the time and effort to increase their skill set and master their craft have earned such esteemed titles and when others who have not dedicated the same effort

claim those titles, they are devalued. Take for example and Licensed Vocational Nurse and a Registered Nurse. These two titles are universally recognized. And for most, it is easy to distinguish between the two which one has a higher skill set and more education. That is not to say that the LVN title is not important. LVNs are vital to the medical field. But the RN, by nature of his or her title, has a wider skill set and a higher level of education.

The same is true for paralegals who have earned the title of Certified Paralegal. Those individuals have displayed an extensive knowledge of the subject matter and have certified that knowledge through examination. Furthermore, certified paralegals are required to maintain their certification through continuing education or recertification exams every so many years. To slap on the word “certified” to someone’s title who has not gone through the intense certification process gives the message to those who have that it was all for nothing. This is not the message we want to convey to our legal professional colleagues.

False credentials in a title may also lead to some confusion as to one’s actual skill set. When applying for positions as a paralegal or legal support staff, the “certified” title can give potential employers a false sense of your actual knowledge and abilities.

This can make for a rough and short term of employment if the abilities you have claimed are not the abilities you have displayed. Be honest about your level of experience. Providing false credentials will only end up hurting your professional reputation and making it much more difficult to gain employment.

I AM “CertiFIED.” How do I use my title?

Congratulations if you have successfully become certified. Your new credentials are well-deserved. Now, utilize them as best you can. Jennifer Herrity, a seasoned career services professional and coach, believes that the proper use of your credentials identifies your profession, your qualifications, and your experience. (Herrity 2023) In addition to certifications, listing your awards, honors, degrees, etc., enhances the value of your title as well. Be proud of those accolades. You have earned them.

Do not be discouraged if you have discovered you were mistakenly using credentials or a title that may not be exactly what you thought they were. Often, it is a simple and honest mistake that can be easily remedied. You may have other credentials you can utilize that perhaps you were not even aware of. You could even try your hand at taking one of the certification exams offered. Check out each exam and see if one is right for you. The websites are included above.

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Lisa M. Gutierrez

Lisa M. Gutierrez is a Medical Malpractice Litigation Paralegal with Lyons & Lyons, PC, in San Antonio with prior experience in personal injury, estate planning, and probate law. She holds an associate in applied science (paralegal specialties) from Del Mar College and a Bachelor of Arts in political science from The University of Texas at San Antonio. She is currently attending Texas A&M School of Law, pursuing her Master of Legal Studies with a focus on health law, policy, and management.

Memberships & Affiliations:

- NALA – The Paralegal Association: Active Member
- State Bar of Texas Paralegal Division: Active Member
- San Antonio Young Lawyers Association: Associate Member
- San Antonio Paralegal Association: Active Member and Membership Director, 2023-2024 Board of Directors

Have a Topic to Share?

Let us know if you have an article you would like to publish.*

Example topics:

- **Substantive Legal Articles** (all areas of law: bankruptcy, civil trial, criminal, family, immigration, corporate/business, environmental, oil & gas; probate, real estate, employment, personal injury, entertainment, intellectual property, etc.)
- **Pre-Litigation:** Subrogation, Interview Techniques, Obtaining a Proper Witness Statement
- **Litigation:** Trial Notebooks, Organization of Complex Document Production, Use of Databases, “On-the-Road”
- **Importance of the Role of Paralegal** • **Non-Traditional Roles for Paralegals**
 - Pro Bono
 - Technology Tips
 - PD Member Achievements

Submit your article to Editor at tpj@txpd.org. *Minimum 2,000 words/.doc format.

PARALEGALS’ PET PEEVES – WORKING WITH ATTORNEYS

When I was asked to write this article I thought, “Oxymoron or a true quandary?” I found myself perplexed as I have been blessed in that I have worked with some fabulous, respectful, and funny attorneys, who as we all do, possess some shortcomings that drive me crazy. However, I always thought it was just me. I did not really think of them as pet peeves, so, to prepare for this article I did two things.

First, I did a little research on what exactly is a pet peeve. I learned that a pet peeve is a minor annoyance that an individual identifies as particularly annoying, to a greater degree than others may find. That a pet peeve often involves specific behaviors of someone close, such as a spouse or significant other. Hello? How about the folks (for this article, the attorney) with whom one works on a daily basis?

Secondly, I recruited the capable help of my fellow Paralegal Division members throughout our great state of Texas. The response, 72 to be exact, was overwhelming, with numerous requests for anonymity. When I started to read the responses, I could not help but giggle because I learned that others share *some* of the same annoyances their supervising attorneys do! However, I am not going out on a limb here. From reading all the responses I received, I have to add that while I do recognize some behaviors in my own experience working with attorneys, I would not

classify them as pet peeves, except for one listed below! Still, my supervising attorneys have truly been awesome mentors.

With that, I want to share some of the responses I received, sarcasm included in some instances. Furthermore, for purposes of explanations, I kept some of the contributions as close to how I received them, if not intact, because some of them were so entertaining, to do otherwise would have done them no justice. In the spirit of David Letterman’s Top Ten list, although I had to go with 20, I decided on:

The Collection of the Top Twenty Paralegal Pet Peeves on Working with Attorneys.

20. When an attorney gets his hands on the case file and rearranges the exhibits in your trial exhibits box, or takes *original* documents received from a client and writes on them!
19. When an attorney assigns a project to more than one paralegal because he “*forgot*” that he had already assigned it, and you find out about it after you have spent hours on it!
18. When an attorney treats you as if you do not have a brain and feels compelled to spoon feed instructions on how to do your job.

“Be sure to send those documents to all counsel by certified mail, and . . .” How about you let me be the paralegal and you be the attorney?

17. When an attorney has an *internal* deadline (one he has set for himself) and comes into your office at 11:45 a.m. announcing that he needs whatever it is he needs, and that he would like “. . . to see a draft when I get back from lunch.” How nice, he expects you to drop everything else, including real deadlines, and your lunch!
16. When a supervising attorney asks you to help train a newly licensed associate and the associate cops an attitude!
15. When an attorney expects you to be a mind reader with his cryptic instructions and then acts as though you are stupid because it is not in the format, or does not contain everything he needs because he didn’t give full, comprehensible instructions in the first place, despite you having repeated his instructions to him, and being assured your understanding of the task was correct.
14. Let us not forget the all-knowing, new attorney/associate who thinks he knows everything about what he is doing and the old lady who has been a paralegal since before

he was born, knows diddly squat. Sometimes it makes you want to go ahead and do it his way and let him screw something up—but your conscience will not let you after all. Or the associate who dictates his objections because he likes them better than the ones which have been used (again, since before he was born) which serve the exact purpose.

13. The attorney who wants revisions, over revisions, and then some, on a cover letter to a district clerk, or another attorney’s revisions, or just for the sake of making them, and all are completely unnecessary!

12. An attorney who cannot seem to understand that **no one** has control, or can hurry responses from any state or federal governmental agencies, no matter who you are!

11. Being asked to complete an assignment which is needed **right away**, then the attorney wants to sit and chew the fat with you concerning a case about which he is excited! What, is this a deadline or not?!

10. The attorney who disappears, literally! One minute he is there, the next, he is gone, and he **knew** Mr. Big was coming to the office for an appointment. So, you get to entertain Mr. Big, and tap dance around with him, in other words lie (See Pet Peeve Number Four), that the attorney got held up on a conference call, or some other such nonsense.

9. When an attorney does not pay attention to the contents of an e-mail. For example, responds to your e-mail, but does not answer the one question you asked, or when he reads only the first line or so, then asks you a question which you answered in the same e-mail! Or when a client copies you on an e-mail sent to the attorney asking for something, and then when the client sends a follow-up e-mail because the client has not heard from the attorney, the attorney comes to you and asks why he did not know about it!

8. When an attorney sends you an e-mail concerning a case, or a conversation he had with a client, judge, or opposing counsel, then comes into your office saying, “I just sent you an e-mail, . . .” and proceeds to tell you the entire contents of his e-mail! Let me read it for goodness’ sake!

7. When an attorney has unrealistic expectations regarding completion of projects. The attorney drops three major projects on your lap and as soon as you turn in the first one, he asks about the third project, and why it is not ready. Oftentimes the more seasoned attorneys forget how much time some projects take to complete because it has been a long time since they have actually worked on something. They become used to giving instructions and once they have done so, the project is out of their head, and they consider the project “done.”

6. Procrastination on any front. Whether it is preparing for trial or meeting a deadline which the

attorney has known about for months! Then, they expect you to put everything else aside to work on it since now it is **really** important. Procrastination causes office wide panic, brings unnecessary stress and leaves the door wide open for mistakes. Not to mention, it gives you the opportunity to work until close to midnight, which is always so much fun!

5. Failure to communicate! When an attorney expects you to know everything that is going on in a case, yet he fails to inform you of, or include you in his telephone or e-mail communications with clients, witnesses, or opposing counsel, and then he looks at you with disgust when days later he asks you a question about it, and you have no clue what he is talking about!

4. When an attorney asks you to tell a blatant lie because he or she has not taken care of what he or she was supposed to do, or because the attorney really does not want to talk to the person (usually a difficult client), so they make you the only line of communication between them.

3. The attorney who does not own up to his mistakes, but instead blames you!

2. Utilizing paralegals solely for clerical/administrative tasks such as giving you their dictation to type, giving you his handwritten hieroglyphic time entries to decipher and enter into the system for billing, collecting fees and, asking you to fill in the little bubbles on the CLE forms, including the state bar numbers, for all the attorneys who attended a CLE!

And the number one pet peeve?

1. An attorney with a superior, condescending attitude—who walks away when you are in the middle of explaining something to him, or tells you, “Not now.” Making you feel as if you are the most unimportant person in the office! What happened to manners, such as “please,” and “thank you?” We all know what attracts flies—sweet scent, on the other hand, attracts the worker bees!

“Be master of your petty annoyances and conserve your energies for the big, worthwhile things. It isn’t the mountain ahead that wears you out - it’s the grain of sand in your shoe.”
– Robert Service

Clara Buckland,
CP, El Paso Electric Company,
District 16 Director

This article was originally printed in the December 04, 2019, issue of the Texas Young Lawyers Association Newsletter.

I believe all of you can relate to some, gosh I hope not all, of the pet peeves in this article. If so, how about you print it and “accidentally” leave it laying on your desk, or “someone’s” desk for his/her reading enjoyment. Or be bold, why not?! Discuss the relatable points in fun conversation with your supervising attorney!

As a side note, I noticed an interesting observation from all the submissions I received. It is not my intent to be stereotypical or sexist. However, all but one of the responses referred

to “him.” Finally, this article is meant to be entertaining, and to truthfully portray the close and sometimes quirky relationship between a paralegal and her/his supervising attorney. Personally, there is no other job that I would rather be doing.

In closing, I want to thank everyone who responded to my query. While I did not include every pet peeve I received, it does not mean that they are not worthy of mention here, but rather, that I needed to keep this article at an honorable length.



Clara Buckland

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18





TOP SECRET

REGISTRATION (Registration is **ONLY** available online [HERE](#))

THREE DAY REGISTRATION

- Admission to all CLE programs, socials and attendee luncheon
- Seminar materials downloaded prior to event and available on TAPS App
- Admission to the Thursday Exhibit Hall featuring legal products and services

- Complimentary Continental Breakfast on Thursday and Friday
- Complimentary ticket to the Friday Annual Meeting Luncheon
- Complimentary ticket to the Wednesday Welcome Social and Thursday Networking Social

ONE DAY REGISTRATION

- Admission to one day of CLE (Wednesday/Thursday socials and Friday Luncheon are an additional fee)

- Seminar materials downloaded prior to event and available on TAPS App



**THE EMBASSY SUITES AND CONVENTION CENTER
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HOTEL ACCOMMODATIONS

The Embassy Suites and Convention Center is located at 7600 John Q Hammons Dr., Frisco, Texas 75034. **The hotel reservation deadline is September 5, 2023.** Reservations must be booked and cancelled through Embassy Suites. Guest room rate is \$145.00 for single/double.

All guest rooms are listed under TAPS 2023-Paralegal Division.

To reserve a guest room, either go online (scroll to the bottom of the webpage), or call (972) 712-7200 and **reference the group code TAPS 2023-Paralegal Division.**

Note: If the desired room you are reserving is not available online, please call (972) 712-7200. Negotiated parking rates are \$5.00 per night/daily.



SEPTEMBER 27TH - 29TH

SOCIALS



WEDNESDAY

A Gathering of Clues

TAPS 2023 kicks off its "I Spy CLE" week Wednesday evening with a gathering of attendees and vendors to begin our quest.

Come enjoy light snacks and cash bar and find clues to get to know your fellow partners in crime.

THURSDAY

Where is the Evidence?

TAPS Thursday night dinner social will be in the Frisco Grand Ballroom where the evidence collection will begin.

But **WHO** has it? Do **YOU** have it? You better be prepared – because you never know what you might need to crack the case – so bring everything you think could be necessary to put the case together!

And no great spy ever works the case without his proper spy apparel and gadgets, so come dressed for sleuthing.

GOOD SPIES GET REWARDS!

FRIDAY

(Luncheon) The Final Analysis

TAPS concludes with our annual meeting and luncheon in the Frisco Grand Ballroom. We will combine all our evidence with a final conclusion of the case to wrap up our spy week.

Thank you to our Thursday Sponsoring Vendors:




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HIGHLIGHTED SPEAKERS



KATIE FLOWERS SAMLER

Katie is a partner with the firm of Goranson Bain Ausley, PLLC in Dallas. Katie is an experienced Board-Certified family lawyer, a family law mediator and practices both Collaborative Law and litigation. She is a member of Collaborative Divorce Dallas, has been named to D Magazine's Top Lawyers Under 40 for three consecutive years, and is recognized as a Super Lawyer in family law. Katie is known

for constructive and creative resolution of cases. Her skills include resolving cases that have complex layers including personality disorders, addiction issues, parental alienation, complex property division, and division of retirement plans. Katie has authored numerous articles and presented on family law issues, including collaborative law, custody litigation, high conflict personality disorders, parental alienation and commentary on tracing and characterization issues.



GENO BORCHARDT

Geno's legal career has focused on health care litigation. After graduating from Baylor Law School in 1989 with honors, Geno served as a briefing attorney for the Texas Supreme Court, Hon. Raul Gonzalez. Geno has over 30 years' experience representing victims of medical negligence, representing health care providers, and even for a time serving as in house counsel to a major hospital. Geno has obtained numerous multi-

million dollar verdicts in health care liability claims for victims, and has been recognized by his peers for his achievements. In his spare time, Geno enjoys time with his family. Geno also proudly volunteers as the stadium announcer for the Texas Wesleyan University Ram football team, his alma mater.



iSPY CLE TAPS 2023

SEPTEMBER 27TH - 29TH



SAMUEL B. BURKE

Sam graduated from Krum High School and received his Bachelor's in Liberal Arts from Austin College. Inspired by his father, Hardy Burke (who graduated from Texas Tech's second law school class), Sam attended Texas Tech School of Law and received his law degree in 1998. Sam is a shareholder in Alagood Cartwright Burke PC.

Sam Burke is board certified in Civil Trial Law by the Texas Board of Legal Specialization and has been honored by his peers and legal publications throughout his legal career. Sam was named a "Texas Rising Star" in General Litigation as published by Thomson Reuters 2008 - 2013. Beginning in 2009 and every year since, Sam has received the prestigious AV Preeminent rating (Top) by Martindale-Hubbell

and was recognized as one of the Top 40 Trial Lawyers Under 40 in Texas by the National Trial Lawyers Organization. Sam was named a "Texas Super Lawyer" as published by Thomson Reuters in 2020 through the present. For the past several years, Sam has been a regular contributor to the Denton Record Chronicle business edition and periodically speaks at continuing legal education seminars on litigation topics.

Sam's clients have benefited from his expertise in complex matters involving real estate, business disputes, condemnation, probate and fiduciary disputes, and serious personal injury.

In addition to his law practice, Sam is involved in the local community. Sam served as a board member of the Corinth Economic Development Corporation and currently serves Corinth as a member of the City Council and currently its Mayor Pro Tem. Sam previously served as a board member of the Denton County Transportation Authority. For several years, he served as a member of the Board of Communities in Schools of North Texas and is a past president of that organization. Sam also served as a Director of the Denton County Bar Association and as a member of the Denton County Bar Association's Judiciary Committee.

These and many other speakers will provide up to 13 HOURS of advanced level CLE at TAPS 2023!

DON'T MISS OUT!



ACCESS GRANTED

TAPS 2023 SCHEDULE

WEDNESDAY, SEPTEMBER 27

Registration 8:00 AM - 4:00 PM
Presentations 9:00 AM - 5:00 PM
Social 5:15 PM - 6:45 PM

THURSDAY, SEPTEMBER 28

Registration 7:00 AM - 4:00 PM
Exhibit Hall 7:00 AM - 2:00 PM
Presentations 9:00 AM - 5:00 PM
Social 6:30 PM - 9:30 PM

FRIDAY, SEPTEMBER 29

Registration 8:00 AM - 10:00 AM
Presentations 8:15 AM - 11:30 AM
Luncheon 11:45 AM - 1:30 PM

TAPS PRICES

THREE DAY REGISTRATION

PD Member Registration Fee \$375*
Non-PD Member Registration Fee \$495*

ONE DAY REGISTRATION

PD Member Registration Fee \$225**
Non-PD Member Registration Fee \$350**

SOCIAL TICKETS (prices per person)

WEDNESDAY: "A Gathering for Clues"
One-Day Attendee \$25
Wednesday Social added Guest \$35

THURSDAY: "Where is the Evidence?"

One-Day Attendee \$70
Thursday Social added Guest \$80

FRIDAY LUNCHEON: "The Final Analysis"

One-Day Attendee/Guest \$65

Additional Fees/Information

* Registration Fee includes ticket to Wednesday social, Thursday social and Friday luncheon
** Social and luncheon tickets for the day of CLE can be purchased at an additional fee (pending availability)
TAPS T-Shirt - Complimentary with registration.
To be eligible for member pricing you must be a member of the Paralegal Division or apply for membership no later than August 28, 2023. There is a late fee of \$35.00 for registration after August 14, 2023.

FRIDAY MORNING SPECIAL SESSION

"BE A SUPER SLEUTH"

Join us this morning for all the information you need to know about being an electronic notary. It will also include an ethical discussion about being an electronic notary.



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PARALEGAL
DIVISION ANNUAL
MEETING.

See HERE for
Complete List of
Sponsors and Exhibitors.



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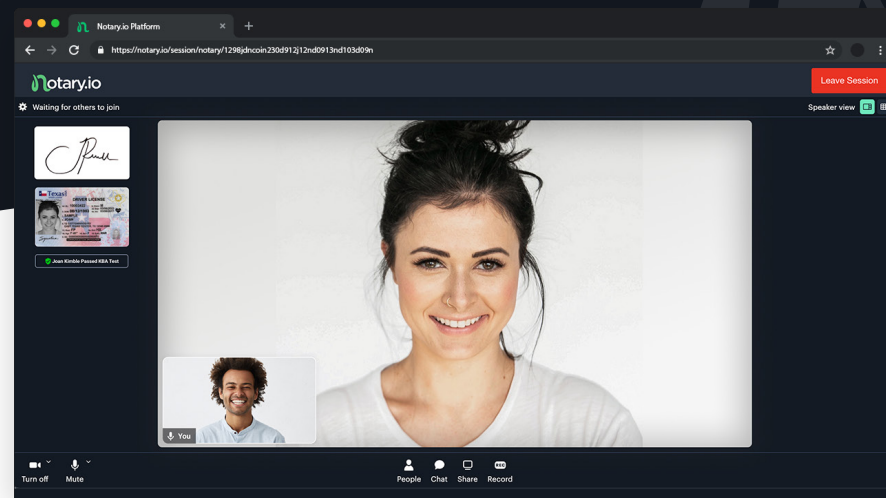
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Types of Documents

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| Acknowledgements | Interrogatories |
| Verifications | Discovery Responses |
| Settlement Agreements | Royalty Agreements |
| Trust Documents | Waiver of Citation |
| Estate Planning Documents | Lien Waivers |
| Powers of Attorney | Confidentiality Agreements |
| Sworn Account Petitions | and so much more... |
| Property Deeds | |

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Incoming President's Message

Texas Advanced Paralegal Seminar
Spring 2023

INCOMING PRESIDENT'S MESSAGE

Joncilee H. Miller, ACP
2023-2024 President



Joncilee H. Miller

What an astounding job the 2022-2023 Board of Directors did! President Lisa Pittman did an excellent job leading this amazing group of paralegals. It was so amazing to get to know and work with the Board, Chairs, and Sub-Chairs. Congratulations everyone and a job very well done!

As we start the 2023-2024 year, we have some great plans and visions we are already in the process of working on. This year's theme is Leading a Legacy. You will hear that phrase often this year. The dictionary defines leading as providing direction or guidance. A legacy is defined as something that is passed on. Founded in 1982, the Paralegal Division has been around for almost 42 years and has become a legacy for paralegals in the State of Texas. Legacies often encourage, impact, and leave pathways for future members. I hope this year you are encouraged by the Paralegal Division in some way. As members, you are part of this great legacy!

I look forward to serving you this next year and continuing to lead the Paralegal Division on exciting paths into the future.



Board of Directors QUARTERLY BOARD MEETING SUMMARY Summer 2023

Submitted by President-Elect, Alice Lineberry, PLS, CP

The outgoing PD Board of Directors met on Friday, June 9 and the incoming PD Board of Directors met on Saturday June 10, 2023 in Dallas, Texas.

2022-2023 Board of Directors and PD Coordinator

President – Lisa Pittman
President-Elect – Joncilee Miller, ACP
District 1 and Parliamentarian – Kim Goldberg, TBLS-BCP
District 2 – Heather Ulliman
District 3 – Wayne Baker, Jr., RP
District 4 and Secretary – Alice Lineberry, PLS, CP
District 5 – Pearl Garza
District 7 – Erica Anderson, ACP
District 10 and Treasurer – Shannon Shaw
District 11 – Vacant
District 12 – Pamela Snavelly, ACP
District 14 – Maria Sturdy
District 15 – Arturo Ortiz
District 16 – Clara Buckland, CP
Paralegal Division Coordinator
Rhonda Brashears, CP, TBLS-BCP

New Incoming Board of Directors for 2023-2024

President – Joncilee Miller, ACP
President-Elect – Alice Lineberry, PLS, CP
District 3 – Monty Mayes
District 4 – Billy Hart
District 7 – Tina Alexander
District 11 – Shannon Smith
The Board of Directors discussed their Districts, events occurring within their Districts over the last year, increases in membership, successful CLEs, and upcoming events, including plans for more CLEs, membership drives, and volunteer opportunities.
Reports were presented for all Standing Committees, Ad Hoc Committees, as well as Liaisons.
They also discussed the preparations for the next membership renewal time period. Renewal cards have already been mailed out.

They discussed ways to continue to increase membership and member benefits. They further discussed the importance of consistent reminders about members keeping their CLE certificates in case of possible spot-audit.

A discussion was held regarding TAPS 2023. It will be held in Frisco, Texas at the Embassy Suites Hotel and Convention Center from September 27-29, 2023. It is a great venue, and the Committee is expecting it to be a great event.

Installation was held for all Directors, followed by orientation. A presentation was made by a registered Parliamentarian providing fundamental principles of parliamentary procedures to the Board.

Charges for all committees were reviewed, finalized, and approved.

Some upcoming dates to remember:

Membership: Pro-rated members time period is December 1, 2023 through February 25, 2024 – join the Paralegal Division for half price!

TAPS 2023 is in Frisco – September 27-29, 2023 – Make Plans to Attend!

Paralegal Pulse and TPJ – The Paralegal Pulse is emailed out monthly and the TPJ is emailed on a quarterly basis. Please open and read them as there is so much information contained in both. And remember to check out the Paralegal Pulse for what is happening in your District and across the state.





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You have a judgment, now what? A discussion of the remedy available to judgment creditors of post-judgment turnover receiverships under Chapter 31 of the Texas Civil Practice and Remedies Code.

MEET YOUR NEW 2023-2024 EXECUTIVE COMMITTEE



Joncilee H. Miller

President - **Joncilee H. Miller, ACP**

Joncilee H. Miller is a civil trial litigation paralegal with Holden Litigation and has over 25 years of experience as a paralegal. She has worked in many fields including Insurance Defense, Wrongful Death, Patent/Trademark, Products, and Appellate.

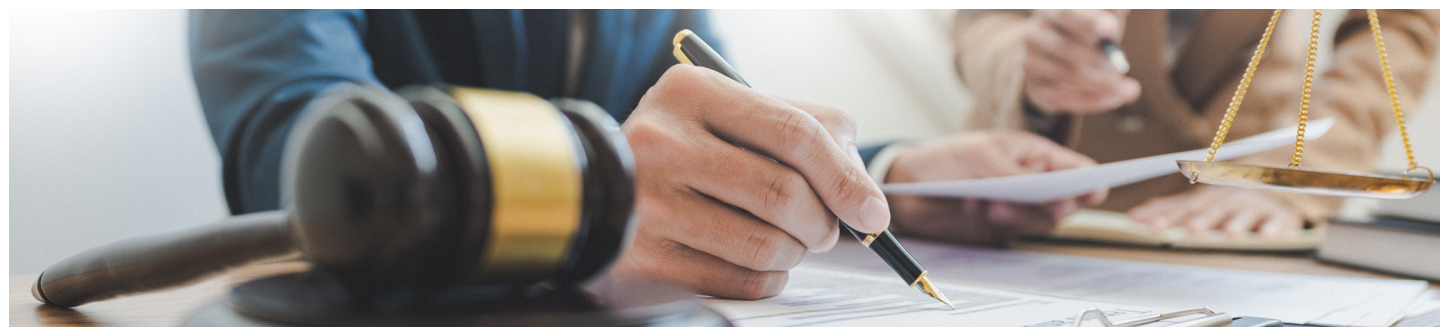
Joncilee attended Texas A&M University and obtained her BA in Political Science, with a double minor in History and Sociology. She received her Master of Science degree Magna Cum Laude from Amberton University in Human Relations and Business. She is an Advanced Certified Paralegal in Trial Practice ("ACP") through NALA.

Joncilee is a charter member of the North Texas Paralegal Association. Having been a member since 2001, she has served in the following capacities: President (2003-2005, 2018-2020), First Vice President – Membership (2001-2002), Second Vice President – Education and

Elections (2009 – present), NALA Liaison (2012-2013), Publications Committee Chair (2008-2009), and Parliamentarian (2006). She is also a charter member of the Texas Bar College, Paralegal Division. In 2005, she was honored with being elected to the Kaplan Education Alumni Hall of Fame. Joncilee was voted as one of Paralegal Gateway's 2012 Paralegal Superstars.

Joncilee has served the Paralegal Division of the State Bar of Texas in many capacities for the past 24 years, including District Two Membership Committee Subchair, Membership Committee Chair, District Two (2) Director, Public Relations Committee Chair, Ambassador, and President-Elect.

She volunteers her time with various organizations, including the Salesmanship Club of Dallas, co-chairing the Corporate Venue Admissions committee.



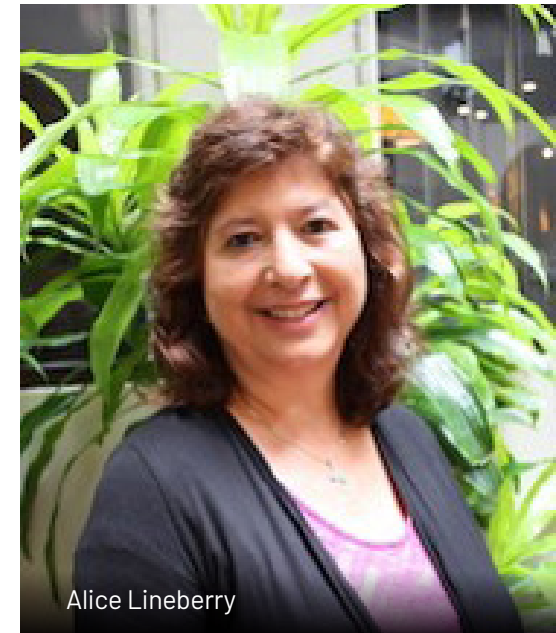
President-Elect - **Alice Lineberry, PLS, CP**

Alice has been a voting member of the Paralegal Division since 1988. She has served the Division as a mentor, as the Membership Chair 2018-2019, Annual Meeting Chair in 2018, on the TAPS Planning Committee-Speakers Committee (2014), and CLE Sub-Chair for District 4 for the last several years.

Alice is a paralegal with the law firm of DLA Piper (US) in Austin, she has been with them since 2001. She has over 35 years of experience in various areas of the law, with the last 19 years primarily focused on patent infringement litigation.

In 1988, Alice earned her Professional Legal Secretary (PLS) certification from the NALS. Alice became a Certified Paralegal through NALA. The Paralegal Association in 1990. Alice has been a voting member of the Capital Area Paralegal Association (CAPA) since 1994 and has served CAPA in various board positions and committee roles over the years, including President.

She is currently serving as the Lunch & Learn Chair. Alice has been married to Colin for 25 years, and they have two sons, Travis and Matthew. She enjoys spending time with family, traveling, reading, and cooking.



Alice Lineberry

Treasurer - **Maria Study**

Maria Sturdy is a Paralegal working under the direction of Chris and Michelle Jones at Jones & Jones in Longview for the past 10 years. Jones & Jones specializes in Employment Law and Personal Injury. Before coming to Longview, Maria worked for Michael G. Carroll in Tyler.

Maria graduated Magna Cum Laude with her Associate Degree in Applied Science with emphasis in Paralegal Studies from Tyler Junior College in 2009. Maria has been a member

of the Paralegal Division since 2015 and is currently serving as District 14 Director.

She has been member of the Northeast Texas Association of Paralegals (NTAP) since 2013 and has served in a variety of roles over the years: President, 1st Vice-President, 2nd- Vice President, Secretary and is currently the Treasurer for the association.

Maria and her husband have 5 children and 11 grandchildren. Maria enjoys cooking, gardening and camping.



Maria Study

Secretary - **Heather Ulliman**, TBLS-BCP

Heather Ulliman is a Family Law paralegal at Goranson Bain Ausley, PLLC in Dallas, Texas. She received her Bachelor's degree in Political Science while playing college soccer at the University of Louisiana Lafayette. After graduation she attended Tarrant County Community College and received a paralegal certification. In 2020, Heather completed her Masters in Legal Studies at Pepperdine University.

Heather is involved in Pro Bono work in the Dallas area. She co-chairs as a paralegal representative with the Dallas Young Lawyers Association Pro Bono Partners committee and assists on getting paralegals involved with their partner organizations and with attorneys.

She is also very active in Big Brothers Big Sisters and enjoys spending a lot of her free time with her Little Brother Erin.



Heather Ulliman

Parliamentarian - **Kimberly A. Goldberg**, TBLS-BCP

Kim's experience and areas of practice concentrate primarily in large and small, complex and simple, commercial litigation matter; including lender liability defense; securities; disputes involving financial institutions; contract claims; construction and employment law. She has participated in many trials and arbitrations in both state and federal courts in Connecticut, Maryland, Missouri, Oklahoma, Louisiana, Utah and Texas.

Between 2007 and 2011, Kim worked with a beginner start-up renewable energy company in the capacity as Vice President of Administration and Human Resources with overall responsibility for development and implementation for human resources and administration. In a short period of 36 months the company grew from 25 to 325 employees expanding into 10 different regions among 5 states.



Kimberly A. Goldberg

Paralegal Division Coordinator - **Rhonda J. Brashears**, CP, TBLS-BCP

Rhonda Brashears has been the Paralegal Division Coordinator since November 2015. Her role on the Executive Committee is one of mentor, to provide historical and procedural information about the Paralegal Division.

Rhonda is also a paralegal with the firm of Underwood Law Firm, P.C., Amarillo, Texas, and has been a paralegal for 37 years. She specializes in personal injury and civil trial defense law. She received her B.G.S. from West Texas A&M University in 1998, her Certified Paralegal designation from the National Association of Legal Assistants in 1996, and was board certified by the Texas Board of Legal Specialization in Personal Injury Trial Law in 1998.

She has been a member of the Paralegal Division since 1990. She currently serves the Division as an Ambassador. In addition, she served as Director of District 7, 1996 until 2001, Secretary, 1999 to 2001, President Elect in 2001 and 2007, and President of the Division in 2002 and 2008. She has also previously served as Chair of the On-Line CLE Committee, the TAPS Planning Committee, the Publications Committee and as Editor of the Texas Paralegal Journal, receiving the Outstanding Committee Chair of the Year as the Publications Chair 2006-2007.

Rhonda is a member of the *Texas Panhandle Paralegal Association*, where she has served as President, President-Elect, Treasurer and NALA Liaison.



Rhonda J. Brashears



MEET YOUR NEW 2023-2024 – BOARD OF DIRECTORS

(see <https://txpd.org/contact-pages/board-and-committee-contacts/> For more information about your director and how to reach out to them)



District 1 Director –
Kimberly A. Goldberg,
TBLS-BCP



District 2 Director –
Heather Ulliman,
TBLS-BCP



District 3 Director –
Monty Mayes,
TBLS-BCP



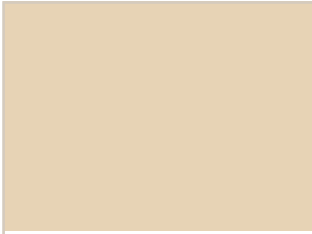
District 4 Director –
Billy Hart



District 5 Director –
Pearl Garza



District 7 Director –
Tina Alexander



District 10 Director –
Vacant



District 11 Director –
Shannon Mendez Smith



District 12 Director –
Pamela Snavelly,
ACP



District 14 Director –
Maria Sturdy,



District 15 Director –
Arturo Ortiz,



District 16 Director –
Clara Buckland,
CP

“After the out-going meeting the 2023-2024 Board of Directors and Officers were installed, which includes the passing of the gavel from Immediate Past-President Lisa Pittman to Incoming President Joncilee Miller.”

RECOGNITION OF THE 2023-2024 COMMITTEE CHAIRS, AD-HOC COMMITTEE CHAIRS AND STATE BAR OF TEXAS REPRESENTATIVES

COMMITTEES

Immediate Past President/Historian
Lisa Pittman

Annual Meeting Committee
Chair: **Joncilee H. Miller** (President)

Continuing Education Committee
Chair District CLE: **Rebecca “Becky” Alldredge**
Board Advisor: **Kimberly Goldberg,**
TBLS-BCP, District 1

Chair Online CLE: **Lisa Pittman**
Board Advisor: **Pearl Garza,**
District 5

Elections Committee
Chair: **Melanie Langford,** ACP
Board Advisor:
Maria Sturdy, District 14

AD-HOC COMMITTEES

Ambassador Ad Hoc Committee
Chair: **Susi Boss**
Board Advisor: **Arturo Ortiz,**
District 15

E-Group Policy Ad Hoc Committee
Chair: **Jay Williams,** TBLS-BCP
Board Advisor: **Pearl Garza,** District 5

Emeritus Membership Ad-Hoc
Committee
Chair: **Mona Hart-Tucker,** ACP
Board Advisor: **Billy Hart,** District 4

Membership Committee
Chair: **R.D. Whitten**
Board Advisor: **Vacant,** District 10

Professional Development Committee
Chair: **Michele Boerder,**
TBLS-BCP, CP
Board Advisor: **Billy Hart,** District 4

Professional Ethics Committee
Chair: **Ellen Lockwood,** ACP, RP®
Board Advisor: **Pamela Snavelly,**
ACP, District 12

Public Relations Committee
Chair: **Kerri Alexander**
Board Advisor: **Clara Buckland,**
District 16

Ethics Handbook Ad Hoc Committee
Chair: **Ellen Lockwood,** ACP, RP®
Board Advisor: **Pamela Snavelly,** ACP,
District 12

Governing Documents Review Ad-Hoc
Committee
Chair: **Javan Johnson,**
ACP, TBLS-BCP
Board Advisor: **Joncilee H. Miller,** ACP

Publications Committee
Chair: **Rhonda J. Brashears,**
CP, TBLS-BCP (Interim)
Board Advisor: **Tina Alexander,**
District 7
TPJ Editor: **Rhonda J. Brashears,**
CP, TBLS-BCP (Interim)

TPJ Advertising PD Coordinator:
Rhonda J. Brashears, CP, TBLS-BCP

Procedures Manual Committee
Chair: **Alice Lineberry,**
PLS, CP (President-Elect)

Leadership Development
Ad Hoc Committee
Chair: **Susi Boss**
Board Advisor: **Shannon M. Smith,**
District 11

Member Renewal Spot Audit
Committee
Chair: **Patricia Giuliano**
Board Advisor: **Vacant,** District 10

Mentor Program Ad Hoc Committee
Chair: **Casey Mills,** TBLS-BCP

Recognition of the 2022-2023 Committee Chairs

Texas Advanced Paralegal Seminar
Spring 2023

Board Advisor: **Heather Ulliman**,
TBLS-BCP, District 2

Paralegal Pulse-E-Newsletter

Chair: **Javan Johnson**,

ACP, TBLS-BCP

Board Advisor: **Clara Buckland**,

CP, District 16

Pro Bono Ad Hoc Committee

Chair: **Julie Sherman**, TBLS-BCP

Board Advisor: **Monty Mayes**,

TBLS-BCP, District 3

STATE BAR
APPOINTMENTS

State Bar of Texas Child

Protection Section

Representative: **Susi Boss**

State Bar of Texas Legal Services to
the Poor in Civil Matters

Representative: **Megan Goor**,

TBLS-BCP

State Bar of Texas Pro

Bono Workgroup

Representative: **Stephanie Sterling**,

TBLS-BCP

State Bar of Texas Unauthorized
Practice Of Law Committee- Northern
Region District 6

Representative: **Eugene Alcala**

Texas Bar College Paralegal Division
Representative

Representative: **Megan Goor**,

TBLS-BCP

Texas Judicial Committee On
Information Technology (JCIT)

Representative: **Stephanie Sterling**,

TBLS-BCP

Standing Rules and Bylaws Ad Hoc
Committee

Chair : **Kim Goldberg**,

TBLS-BCP (Parliamentarian)

Student Liaison – Appointment

Chair : **Elaine Simmons**, CP

Board Advisor: **Maria Sturdy**,

District 14

Sustaining Member/Vendor Liaison

Chair: **Diana Olack**

Board Advisor: **Arturo Ortiz**,

District 15

TBLS Helpful Hints Ad Hoc Committee

Chair: **Javan Johnson**,

ACP, TBLS-BCP

Board Advisor: **Kim Goldberg**,

TBLS-BCP, District 1

Texas Advanced Paralegal Seminar

(TAPS) Planning Committee

Chair: **Lisa Pittman**

Board Advisor: **Joncilee H. Miller**

Texas Bar College Application Review

Chair: **Megan Goor**, TBLS-BCP

Board Advisor: **Tina Alexander**,

District 7



SAVE THE DATE



NFPA 2023 Annual Convention and Policy Meeting

October 5 - 8, 2023

hosted by National Capital Area Paralegal Association

www.paralegals.org



THANK YOU TO THE FOLLOWING FOR THEIR SERVICE TO THE PARALEGAL DIVISION IN 2022-2023

Lisa Pittman, President

Joncilee H. Miller, President Elect

District 1 Director –

Kimberly A. Goldberg,
TBLS-BCP (Parliamentarian)

District 2 Director – **Heather Ulliman**

District 3 Director –

Wayne Baker, Jr., RP

District 4 Director – **Alice Lineberry**,
PLS, CP (Secretary)

District 5 Director – **Pearl Garza**

District 7 Director – **Erica Anderson**,
ACP

District 10 Director – **Shannon Shaw**
(Treasurer)

District 11 Director – **Vacant**

District 12 Director – **Pamela Snavelly**,
ACP

District 14 Director – **Maria Sturdy**

District 15 Director – **Arturo Ortiz**

District 16 Director – **Clara Buckland**,
CP

2022-2023 Committee Chairs, Ad-Hoc Committee Chairs and State Bar of Texas Representatives

COMMITTEES

Immediate Past President/Historian
Susi Boss

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Chair: **Lisa Pittman** (President)

Continuing Education Committee
Chair District CLE: **Vacant**
Board Advisor: **Alice Lineberry**,
PLS, CP, District 4

Chair Online CLE: **Amy Rainwater**,
TBLS-BCP, PHP (Interim)
Board Advisor: **Pearl Garza**, District 5

Elections Committee
Chair: **Melanie Langford**, ACP
Board Advisor: **Maria Sturdy**,
District 14

Membership Committee
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ACP / R.D. Whitten
Board Advisor: **Shannon Shaw**,
District 10

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Board Advisor: **Wayne Baker**,
RP, District 3

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Board Advisor: **Erica Anderson**,
District 7

Public Relations Committee
Chair: **Kerri Alexander**
Board Advisor: **Stacey Marquez**,
District 11

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CP, TBLS-BCP (Interim)
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TBLS-BCP, District 1

TPJ Editor
Rhonda J. Brashears,
CP, TBLS-BCP (Interim)

TPJ Advertising
PD Coordinator
Rhonda J. Brashears,
CP, TBLS-BCP

Procedures Manual Committee
Chair: **Joncilee H. Davis**,
ACP (President-Elect)

AD-HOC COMMITTEES

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Board Advisor: **Arturo Ortiz**,
District 15

E-Group Policy Ad Hoc Committee
Chair: **Jay Williams**, TBLS-BCP Board
Advisor: **Pearl Garza**, District 5

Ethics Handbook Ad Hoc Committee
Chair: **Ellen Lockwood**, ACP, RP®
Board Advisor: **Erica Anderson**,
District 7

Leadership Development Ad Hoc
Committee
Chair: **Susi Boss**,
Board Advisor: **Kim Goldberg**,
District 1

Long-Term Strategic Planning Ad-
Hoc Committee
Chair: **Michele Boerder**,
CP, TBLS-BCP
Board Advisor: **Alice Lineberry**,
PLS, CP, District 4

Member Renewal Spot Audit
Committee
Chair: **Patricia Giuliano**
Board Advisor: **Pamela Snavelly**,
ACP, District 12

Mentor Program Ad Hoc Committee
Chair: **Gabby Warner / Casey Mills**,
TBLS-BCP
Board Advisor: **Alice Lineberry**,
PLS, CP, District 4

Paralegal Pulse-E-Newsletter
Chair: **Javan Johnson**,
ACP, TBLS-BCP
Board Advisor: **Pam Snavelly**,
ACP, District 12

Pro Bono Ad Hoc Committee
Chair: **Monty Mayes**,
Board Advisor: **Heather Ulliman**,
District 2

Standing Rules and Bylaws Ad Hoc
Committee
Chair: **Kim Goldberg**,
(Parliamentarian)

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Chair : **Elaine Simmons**, CP
Board Advisor: **Maria Sturdy**,
District 14

Sustaining Member/Vendor Liaison
Chair: **Diana Olack**
Board Advisor: **Wayne Baker**,
RP, District 3

TBLS Helpful Hints Ad Hoc Committee
Chair: **Javan Johnson**,
ACP, TBLS-BCP
Board Advisor: **Wayne Baker**,
RP, District 3

Texas Advanced Paralegal Seminar
(TAPS) Planning Committee
Chair: **Susi Boss**
Board Advisor: **Lisa Pittman**

Texas Bar College Application Review
Chair: **Megan Goor**, TBLS-BCP
Board Advisor: **Arturo Ortiz**,
District 15

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State Bar of Texas Child
Protection Section
Representative: **Susi Boss**

State Bar of Texas Legal Services to
the Poor in Civil Matters
Representative: **Megan Goor**,
TBLS-BCP

State Bar of Texas Pro
Bono Workgroup
Representative: **Stephanie Sterling**,
TBLS-BCP

State Bar of Texas Unauthorized
Practice Of Law Committee- Northern
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Representative: **Eugene Alcalá**

Texas Bar College Paralegal Division
Representative
Representative: **Megan Goor**,
TBLS-BCP

Texas Judicial Committee On
Information Technology (JCIT)
Representative: **Stephanie Sterling**,
TBLS-BCP



A PROUD MEMBER OF
**PARALEGAL
DIVISION**
OF THE STATE BAR OF TEXAS

**PARALEGAL DIVISION
ANNOUNCES NEW
MEMBER BADGE FOR
SIGNATURE BLOCK.**

The Paralegal Division has developed a new badge for your signature block.

Log into your account and then under My Account you will find the download of the new badge so all Paralegal Division members can proudly show their membership with the PD!

In Memory of -
**NATASHA GEDDIE -
RINEHART**
District 2 Member

Natasha Geddie-Rinehart passed away on February 23, 2023, after losing her fight with esophageal cancer. She was a paralegal at West & Associates, LLP.

Natasha had recently become Certified by the Texas Board of Legal Specialization in 2022. Natasha was a paralegal for 33 years. She received her paralegal certificate from Southeastern Paralegal Institute in 1989. Prior to receiving her paralegal certificate, she was a legal secretary for five years. Natasha had over 3 decades of trial experience in federal, district and county court at law. Fun fact about Natasha is that she was an accordion teacher. She started playing the accordion when she was 3 years old and taught dozens how to play both the keyboard and button accordion.

On October 1, 2022, Mr. Norman Crittendon of Jefferson County, Texas, was found to have committed Professional Misconduct by the Paralegal Division Grievance Committee and the Paralegal Division Disciplinary Committee sanctioned Mr. Crittendon with expulsion from membership in the Paralegal Division of the State Bar of Texas.



MENTOR PROGRAM

BE A MENTOR | HAVE A MENTOR

Protégés:

- Receive guidance/direction/support on topics such as ethics, career advancement, & professionalism.
- Access to valuable networking opportunities with other paralegals and the legal community through your mentors and others at state-wide and district PD events.
- Opportunities to learn more about the PD and PD activities & opportunities to get more involved.

Mentors:

- Opportunity to share your guidance/direction/support on topics such as ethics, career advancement, & professionalism.
- Encourage and promote the Division, and opportunities to participate in the Division.
- Invite Protégés to attend Division functions, and introduce Protégés to Division leadership, as well as some of the members.

*Voting, active members in good standing, with at least seven (7) years of experience as a paralegal, are qualified to serve as Mentors. Mentors must complete the requisite application acknowledging Mentor has read and agrees to follow the Mentor Program Guidelines.

SIGN UP TODAY

For more information contact:
mentorprogram@txpd.org

THE PARALEGAL DIVISION RECOGNIZES THE FOLLOWING MEMBERS WHO RECEIVED AWARDS FROM OTHER ASSOCIATIONS IN THE LAST YEAR.

County and District Clerk's Association of Texas – 2022 District Clerk of the Year

Clarissa Webster, CP was awarded the 2022 District Clerk of the Year by the County and District Clerk's Association of Texas. There are 254 district clerks in the State of Texas, and only one is awarded clerk of the year at each Annual Summer Conference. Ector County was formed in the late 1800s, and Clarissa is the first clerk in this county to receive this award. Clarissa Webster, CP is an Emeritus Member of the Paralegal Division from District 11.



Clarissa Webster

Fort Worth Paralegal Association – Paralegal of the Year



Summer Chappell

FWPA Paralegal of the Year is nominated by other members of the Fort Worth Paralegal Association the nominees must have been a voting member of the FWPA for at least one year; have a minimum of 5 years' experience in a paralegal position and must have served as an officer, chairperson, or committee member of FWA. The nominees all demonstrate the highest standards of work ethic, professionalism, and excellence in the paralegal field. Only one person can be chosen based off their resume,

letters of recommendation from their supervising attorney, and two references. This information is sent to an independent Judge outside of the metroplex to determine the winner, the Judge only knows the nominees as "candidate." This award is presented each year at the FWPA Holiday Luncheon.

This year FWPA awarded this esteemed award to **Summer Chappell** an Active Member of the Paralegal Division from District 3.

Fort Worth Paralegal Association – Outstanding Committee Chair Service Award



Megan Goor-Peters

The Outstanding Committee Chair Service Award is given to recognize a Fort Worth Paralegal Association member who has shown exceptional commitment to the FWPA and his/her committee. In 2022, this inaugural award was presented to Megan Goor-Peters, TBLS-BCP, for her dedication to the many FWPA hats she wore and for the launching and development of the FWPA website and social media outlets.

Megan Goor-Peters, TBLS-BCP is an Active Member of the Paralegal Division from District 3. She is also served the Paralegal Division as President for two terms.

Fort Worth Paralegal Association – Pro Bono Volunteer of the Year Award

The Pro Bono Volunteer of the Year Award is bequeathed each year to a deserving. In 2022, this award was presented to **Kelly Cobb**. Kelly is an Active Member of the Paralegal Division from District 3.



Kelly Cobb

PARALEGAL ETHICS HANDBOOK

The *Paralegal Ethics Handbook* is a resource for all paralegals, attorneys, and members of the legal community that addresses ethical considerations for 17 practice areas, as well as considerations for in-house, corporate, freelance, administrative, governmental, and regulatory law paralegals. The PEH:

- ♦ 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 cannons, plus related information; and
- ♦ Contains rules and regulations for all 50 states and Washington, D.C.

The PEH explains how to determine whether an action may be an ethical violation.

Authored by Paralegal Division members, with input from the legal community. Published by Thomson Reuters.

<https://tinyurl.com/txpdPEH>



www.txpd.org



TBLS PD Members

Texas Advanced Paralegal Seminar
Spring 2023

TBLS PD MEMBERS

The Paralegal Division would like to recognize the members who have the honor and distinction of being Texas Board of Legal Specialization Certified Paralegals. We are proud to have so many of our members who claim this certification status.

LAYNE ACKER
DIANA ACOSTA
DENISE ALBERINO
ROSHAEA DENISE ALFORD
REBECCA ALVAREZ
CATARINO ALVEAR
KRISTINE A. ANDERSON
EMILY ANDREWS
CARMEN J. ANTOL
JENNIFER ARMENDARIZ
KAREN ARRINGTON
AMANDA ATKEISSON
AMBER D. ATKINS
CYNTHIA R. BAILEY
DEBORAH ANN BAKER
MELISSA BALMER
PATRECA BANKS
JILL M. BAUERLEIN
HEIDI BEGINSKI
KRISTY T. BEINS
RODNEY BERNAL
PAMELA BERRY
KATHY BESHIRS
ASHLEIGH ALVARADO BIJARRO
MICHELE M. BOERDER
MARNEE BOLEN
AUSTIN BOWEN
P. MARIE BOYDSTON
SHARON BRADFORD
SANDRA BRANCH
RHONDA J. BRASHEARS
PAUL BREZIK

JANET L. BRIERY
ESMERALDA BRIONES-TAMEZ
SAMANTHA BRISENDINE
CHRISTINE BROWN-GUAJARDO
ELIZABETH BRUTON
VICTORIA BUCKLEY
PAULA BULLINGTON
HOLLY MARIE BURCH
ANDREA BURGER
KATHLEEN BURIAN
CAROLYN S. BURTON
KIMBERLY CABOCHE
MARTHA CALDERON
ASHLEY CARDWELL
ANNE MARIE CARLIN
STEPHANE CARLSON
LINDA A. CARRETTE
RUTH CASEY
MARTHA CASTANEDA RAMIREZ
MARIELA E. CAWTHON
DORIS ANN CENICEROS
VICTORIA CERNADAS
REBECCA D. CERVANTES
SUSAN WENDELE CHANDLER
E. DENISE CHATHAM
JANET E. CHILDERS
CATHY L. CLAMP
ANDREA CLARK
SHANNON CANTRELL CLEMENTS
NICOLE CLOUTIER
PAULA CHRISTIE COHEN
STACEY L. COLE

CARLI COLLINS
BRENDA C. COLVIN
HEATHER CRAWFORD
TRACEY CRYER
CINDY CURRY
KATHY DAVILA
SUSAN DAVIS
HEIDI M. DE LA ROSA
DIANA E. DELK
JAIME DICKERSON
PEGGY L. DIETER
RYAN DIXON
REBEKAH J. DUKE
CINDY DUNN
KIMBERLY ANN EDGINGTON
BRITANY L. EDWARDS
EMILY EMORY
ROXANN M. ENCIZO
TAMMY ESSING
KAY E. FINCH
ERIN NICOLE FISHER
JILL F. FORD
EVODIJE FORNELIUS
JESSICA FOSS
LESLEE FOX
CATHY FRASIER
TERRI S. FRENCH
GINGER D. GAGE
ANA GALVAN
ANGELICA GARCIA
YOLANDA GARCIA
WILLIAM GARFIELD

TBLS PD Members

Texas Advanced Paralegal Seminar
Spring 2023

EDNA W. GARZA

CHRISTINA GARZA

EMILY H. GATLIN

KATHY C. GEOFFRION

NICOLE GIEBER

VIRGINIA PERALES GIL

CAITLIN GINN

SANDRA GLASHAN

MELODYE A. GLINA

ANGELA ALDRICH GOLDBERG

KIMBERLY A. GOLDBERG

ERNESTO A. GONZALEZ

NICOLE D. GONZALEZ

MELODY J. GOODWIN

MEGAN GOOR-PETERS

NEDDA R. GRAVES

LISA GRAY

JENNIFER ELAINE GREAR

KENDRA GRIESEMER

DEBRA RENE GRIFFITH

GLYN GRIFFITH

ALYSA S. GRISSOM

MEREDITH GROSS

LINDA C. GRUMMET

CARRIE R. HALL

KATIE HALL

JAEL BANDA HAMILTON

SHANNON S. HAPPNEY

HEATHER E. HAYNES

ROBERT A. HEINLY

HEIDI A. HELSTROM

STEFANIE HENDERSON

VERONICA HERNANDEZ

JULIE L. HILL

KIMBERLY HILL

KATHERINE HINOJOSA

CLAUDIA HIPPS

REBECCA HOFFMAN

DIANA M. HOLDER

MONTYE HOLMES

PAMELA R. HORN

DEBBIE HOUSE

ANNA LORILYN HUCKABY

EVA D. HUMBERSON

VALERIE A. HUMPHREYS

JENNIFER HUTCHISON

CHERYL LYNN INGENLOFF

AMIE JACKOWSKI

MISTI DYANE JANES

ANDREA JOHNSON

SUSY JOHNSON

AMY TIMBERLAKE JOHNSON

TAIT C. JOHNSON

JAVAN JOHNSON

JODYE L. KASHER

CHRISTIE K. KEELING

HOLLY MARIE KEEN

DONELLE JO KEEN

KRISTINA KENNEDY

REBECCA L. KINDRED

TERESA ANN KING

CARRIE W. KING

ELIZABETH KISSEE

SANDRA O. KNELL

JUANITA F. KOPP

CHRISTINA C. LADYMAN

ANGIE F. LAIRD

PATRICIA LAMPTON

GINA LANDINGHAM

CHRISTI A. LANKFORD

ELIZABETH LASATER

REBECCA LEE-JONES

AMANDA LEQUERIQUE

WANDA LESTER

CANDACE R. LEWIS

SPRING D. LIBERTY

ANDREW LIESMAN

ANNA LIESMAN

VICKI A. LORENZEN

TARA D. LUEDKE-MORA

MICHAL CATHERINE MACKOY

CLAUDIA RACHEL MANN

TAMMIE MARRS

LYNN COLLIER MARTIN

SARA MARTIN

CRYSTAL MARTINEZ

ALEXANDER MAY

MONTY L. MAYES

NATALIE ANNE MCCORKLE

KIMBERLY MCDONALD

REBECCA MCDONALD

REBECCA A. MCGIBENY

DIANA MCGRATH

LORRAINE MCMAHAN

KATHY MELENDEZ

STEPHANIE A. MERCK

CASEY RENEE WHEELER MILLS

THERESA LUKE MITCHELL

LISA K. MITCHENER

CINDY MOON

CALLIE C. MOORE

KATHRYN MOORE

KIMBERLY MOORE

NELLY MORALES-SORIANO

MATTHEW K. MORELAND

CELIA DIANNE MORGAN

CHERYL S. MORRIS

VANETTA MURPHREE PETERSON

KENNETHA M. MURPHY

CYNTHIA RENE' MURRAY

PAMELA C. NELSON

MORGAN NEWMAN

PAULINA NGUYEN STEPHENS

DEBRA L. NIX

CATHERINE M. NOLAN

JANET NOLLEY

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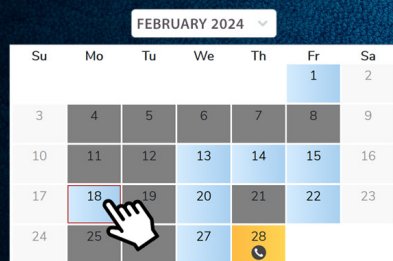
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A paralegal may become, or may maintain his or her status as an associate member of the College by

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- (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.

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