

# TEXAS ROUNDUP

July 2008

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**Elizabeth G. Wells, PP, PLS, TSC**

And the Answer Is...



## The “I”s have it!

Leslie Stokes, PP, PLS, TSC

What do **I**magination, **I**deas, and **I**nspiration have in common?  
Why you of course!

We need *your* imagination to push Texas ALP forward and to continue its legacy. We need *your* imagination to help develop new avenues and opportunities to reestablish and reconnect with our legal community. How do we reach across the bar to the attorneys to enlighten and inform them of what Texas has to offer? How do we connect with students who may one day become our co-workers?

Texas needs *your* original and innovative ideas to maximize our membership benefits. Texas needs *your* creativity to offer ideas to all local chapters facing challenges in increasing our membership numbers or offering certification study classes or developing a leadership event. Texas needs *your* enthusiasm not only in generating interest in the legal community, but as a java jolt within our association.

Inspiration can also come from unexpected places; from anyone, anywhere, and at any time. Sometimes it is tough to reach out for inspiration, because it can be easier to continue along the same path. For me, the following quote offers inspiration at times when I am trying to stretch my boundaries:

Here's to the crazy ones. The misfits. The rebels. The trouble-makers. The round heads in the square holes. The ones who see things differently. They're not fond of rules, and they have no respect for the status-quo. You can quote them, disagree with them, glorify, or vilify them. But the only thing you can't do is ignore them. Because they change things. They push the human race forward. And while some may see them as the crazy ones, we see genius. Because the people who are crazy enough to think they can change the world, are the ones who do.

—*On the Road* by Jack Kerouac

*Leslie Stokes, PP, PLS, TSC*

# Dates to Remember

## TEXAS ALP

- July 22 Deadline to submit bids to President for 2009 Fall Board Meeting
- August 1 Deadline to submit article for November issue of *The Texas Docket* to Sharon Lee
- August 6 Deadline to submit items for the FBM Call to Stephanie Burns
- August 20 Deadline to submit article for July issue of the *Texas Roundup* to Mary Smith
- August 28 Registration Deadline \* 2008 Fall Board Meeting  
Wichita Falls



## NALS

- July 15 Registration Deadline \* 2008 NALS National Forum \* Norfolk, Virginia  
Please visit the NALS Web site for conference information - [www.nals.org](http://www.nals.org)
- July 15 Deadline to submit application for NALS Award of Excellence nominee
- July 18-20 NALS Region 6 Annual Meeting and Educational Conference  
Kansas City, Missouri
- August 1 Deadline to submit application for PP/PLS/ALS September exams
- August 5 Online Study Group \* 8 p.m. Central \* Part 1 of the ALS, PLS and PP Exams
- August 6 Online Learning Session \* 8 p.m. Central \* Emerging Areas of Law
- August 12 Online Study Group \* 8 p.m. Central \* Part 2 of the ALS, PLS and PP Exams
- August 19 Online Study Group \* 8 p.m. Central \* Part 3 of the ALS, PLS and PP Exams
- August 20 Online Learning Session \* 8 p.m. Central \* How NALS is Beneficial for Students
- August 26 Online Study Group Group \* 8 p.m. Central \* Part 4 of the PLS and PP Exams
- September 1 Deadline to submit NALS Foundation grant application

## **CONGRATULATIONS!**

to **Wichita County LSA** on your 50<sup>th</sup> Anniversary on July 7!!



## **2008 TEXAS ALP ANNUAL MEETING A “STAR-STUDED” EVENT**

Amelda Perritt, PLS, and  
Sharon Simpson, PLS, Co-Chairmen

The Texas ALP 53<sup>rd</sup> Annual Meeting and Educational Conference was held in Fort Worth from May 1-4, 2008, at the beautiful DFW Marriott Hotel and Golf Club.

Fort Worth ALP held a red carpet welcome for all of the members to enjoy their interpretation of Hollywood throughout the conference. Members entered Contract Negotiations (registration) when they arrived. The Texas ALP Committees held their Rehearsals (meetings). There were many Movie Agents (business and fun vendors) both on Friday and Saturday during the conference.

Texas ALP offered seven hours of excellent continuing legal education seminars:

- Act 1: CLE - *Bankruptcy Reform - Has It Been Effective* by Carey Ebert, Esq.
- Act 2: CLE - *Removal and Remand* by Kirk Pittard, Esq.
- Act 3: CLE - *Offshore Outsourcing-How It Impacts You* by E. Earl Harcrow, Esq.
- Act 4: CLE - *Legal Aid in Your Community* by John Shaw
- Act 5: CLE - *Magistracy-More Than Traffic Tickets* by Honorable J. Daniel Rodgers
- Act 6: CLE - *Ethics* by Ann Dunkin
- Act 7: CLE - *Responsibilities of an Attorney Ad Litem* by Kelly DeBerry, Esq.

On Friday evening, Texas Legal Directories hosted the Welcome Reception on the beautiful grounds of the hotel, which included a Fajita Bar and Mashed Potato Bar! NALS President Dee Beardsley, PP, PLS, was given a warm and friendly Texas ALP welcome by the members. She was presented with fabulous fabrics and other quilting accessories as a "Welcome to Texas." The business meeting ran as a first-rate production. The meeting began with a very patriotic and moving testament to our country. A special video presentation was shown regarding the history of our national anthem. The United States Marine Color Guard presented the colors and then the anthem was beautifully sung by Donna Dendy, PP, PLS, CLA, of Waco LPA. The members were welcomed to Fort Worth by both the Honorable Robert McGrath and Patricia Graham, PLS, Executive Director of the Tarrant County Bar Association. Some of the highlights of the business meeting were the 2009 Annual Meeting will be held in Waco, Texas; the Legal Professional of the Year finalists, Patricia Heaney, PLS, Austin LSA, Inc., and Janet Brown, PLS, San Antonio LSA, were presented with certificates; President Cheryl Moseley, PLS, PP, CP, gave a warm, encouraging, and uplifting outgoing president's message to the members; Elizabeth Wells, PP, PLS, TSC, presented the 2008-09 Membership Campaign, "The Texas ALP Train 2008-09 to Tomorrow"; and incoming President Leslie Stokes, PP, PLS, TSC, shared her vision for next year, "Leave Your Legacy."

Saturday night's President's Ball was a spectacular Hollywood blockbuster - complete with feathers, glowing centerpieces, oversized martinis, and a Hollywood backdrop for the stage. Patricia Heaney, PLS, was honored as the 2007-08 Legal Professional of the Year. The installation of the 2008-09 officers was fun, fast, and fabulous thanks to Diane Sheehan, PLS, the Installing Officer. The members also enjoyed some fun and funky music, thanks to the wedding next door!

If you missed this "star-studded" event, it's not too late to see some of the events by ordering a copy of the 2008 Annual Meeting CD. This contains the official photographs taken during the conference. Please contact Kathie Keys, PP, PLS ([kathie@wbwpc.com](mailto:kathie@wbwpc.com)) or Sheryl Mann, PP, PLS ([manssheryl@yahoo.com](mailto:manssheryl@yahoo.com)) to order your CD.

Fort Worth ALP would like to thank all of the members who attended this special meeting as our "own" Leslie Stokes was installed as President. We enjoyed hosting everyone in our own backyard!



# COME TO OUR 50<sup>TH</sup> ANNIVERSARY CELEBRATION!!!!

**Dianna C. Roberts, PLS, TSC**

We are looking forward to hosting the 2008 Fall Board Meeting in Wichita Falls. Since we were chartered in 1958, we ask you to join us in celebrating our 50<sup>th</sup> Anniversary. We have asked some of our favorite attorneys to lead us in legal education seminars for six hours of CLE (see the registration form online for the subjects). Homewood Suites (see its Web site) has good breakfasts and is close to MSU, Sikes Senter Mall (and other shopping centers that are new since many of you were in Wichita Falls for the last meeting we had), and many restaurants.

With the “new” shortened meeting schedule, we will get started with a Welcome Reception about noon on Friday, September 19, 2008. As we did in Fredericksburg, if you cannot attend the entire meeting, you can just pay for those events you can attend. After the business meeting is adjourned on Saturday afternoon, we will end the conference with a special dinner in commemoration of our 50<sup>th</sup> Anniversary.



## What Do You Propose?

**Donna K. Dendy, PP, PLS, CLA, TSC**

Reminder: All proposed amendments to the Bylaws and Standing Rules for consideration at the Fall Board Meeting are due to me by July 20, 2008. Please submit in the form previously provided to you by e-mail.

All proposed amendments should be sent to: Donna K. Dendy, Post Office Box 58, Waco, Texas 76703-0058.

If you need additional information, please contact me.

# What is NALS CERTIFICATION?

Tina Hurley, PP, PLS



You have heard NALS certifications mentioned at the Texas ALP meetings, printed in the Texas Docket, and in mass e-mails from the Certification Committee. You have seen members wearing pins and have seen that when members with NALS certifications sign their name or are introduced, there are letters after their names. You know there are tests you have to take to get the pins and the “letters” after your name. Perhaps you have thought, “Do I want to take a test to have a pin and letters?” Have you looked at the NALS Web site to see what certification is all about?? That is the best place to go other than speaking to those members who have one or more of the NALS certifications.

Someone once said that if you are not growing in your work you just have a job. If you are growing in your work, you have a career. Obtaining a NALS certification is growth in your work—a career commitment. Showing the personal pride of knowing that you are doing all that you can do to improve yourself in your career choice is the reason for the “pin and letters.” Having those letters lets others (co-workers and current and future employers) know that you have made the commitment to have a career and not just a job.

Please go to the NALS Web site ([www.nals.org](http://www.nals.org)) to determine for each certification the qualifications, the test dates, costs, the application, etc. Next, decide to make a career commitment and sit for a NALS certification exam.

Following is a brief summary of the ALS exam. The PLS and PP exams will be discussed in future issues of *The Texas Roundup*.

## **“ALS . . . the basic certification for legal professionals – a Career Goal”**

This designation is awarded after passing a four-hour, three-part examination. The exam parts are: Written Communications; Office Procedures and Legal Knowledge; and Ethics, Human Relations and Judgment.

Passing this examination and being awarded the ALS certification indicates to others that you:

- Have the ability to perform business communication tasks.
- Have the ability to maintain office records and calendars, and prioritize multiple tasks when given real-life scenarios.

- Have an understanding of office equipment and related procedures.
- Have an aptitude for understanding legal terminology, legal complexities, and supporting documents.
- Have recognition of accounting terms in order to solve accounting problems.
- Have knowledge of law office protocol as prescribed by ethical codes.

If you have any questions regarding certification, please contact the Chair of the Certification Committee, Tina Hurley, PP, PLS, at [tina.hurley@haynesboone.com](mailto:tina.hurley@haynesboone.com).



## Logo Items for Sale

Sheryl A. Mann, PP, PLS

Your Finance Committee has been successful in selling all finance items in stock with the exception of picture frames and is working to obtain new items to sell beginning at the Fall Board Meeting in Wichita Falls. And since the members are the ones purchasing, we would like the members to give us suggestions ([kathie@wbwpc.com](mailto:kathie@wbwpc.com)) on what you would like to buy.

Don't forget—if you purchase something between now and the end of the Fall Board Meeting, your name will go in a drawing and you become eligible to win the purse that was on display at the Annual Meeting in Fort Worth!

## How Could I Do That?

Cheryl A. Wenzel, PP, PLS

How many times have you been at a meeting and thought to yourself, "I could never do that!" The people you see leading the meeting are so together and well-informed and seem to know everything. HOW COULD I DO THAT??? Guess what? You're already thinking about it, so now complete the process. We are all our own worst critics. We see our weaknesses before anything else, but others see so much more in us. That is why you need to take a chance on yourself and go forward! If you have self-doubts, that is only natural, and most importantly, it means that you care. You care about the association, you care about the people, and you care about helping the association.



You never knew did you? You have natural leadership qualities. Texas ALP is always looking for great leaders. Go ahead, jump in, and have other newer members look at you and say, "I could never do that!" So go forward and continue the process for yourself and the association.

## **It's YOUR Future!**

Elizabeth G. Wells, PP, PLS, TSC-RE



### ***Experience Texas Association of Legal Professionals ~ It's YOUR Future!***

Association (*noun*): an organized body of people who have an interest, activity or purpose in common; connection or combination; friendship; companionship.

We know you've heard the buzz about the Texas Association of Legal Professionals (Texas ALP). We also know you've thought about coming to one of our meetings or a local chapter meeting, but talked yourself out of it because you didn't know anyone. Or maybe you thought about volunteering but don't want a huge time commitment. You are probably wondering what's in it for you? The answer is YOUR FUTURE. Texas ALP is educating, cultivating and developing tomorrow's association leaders today.

**Who are we?** Members consist of legal secretaries, legal assistants/paralegals, receptionists, bookkeepers, court reporters, process servers, employees of bank trust departments and title companies, and in-house legal staff, among others.

**What can we offer you?** The primary purpose of Texas ALP is to enhance members' education and expertise in the legal field. Local chapters have monthly meetings with programs of particular interest and educational value to anyone engaged in work of a legal nature. Two state meetings, two national meetings, and one regional meeting each year also offer additional education and training. The opportunity to share information and ideas with peers and to obtain business contacts through networking is an added benefit of membership. There are opportunities for both personal and professional growth through leadership and serving as committee members, chairpersons, or officers. Each local chapter publishes a monthly bulletin keeping its members informed of upcoming meetings and educational opportunities. *The Texas Docket* provides information regarding state functions and activities along with legal education articles in each issue. NALS publishes *@ Law*, which contains educational articles, announcements of activities, and news items of interest pertinent to the legal profession. Further recognition is received by earning the designation of ALS...a basic certification for the legal professional, PLS...an advanced certification for the legal professional or, for professionals performing paralegal duties, the Professional

Paralegal, three certifications offered through NALS. The designation of Specialty Certified in a specific area of Texas law, offered through the Texas Institute for Specialty Certification is also obtainable.

**Why should I join?** Isn't it obvious yet? Join Texas ALP to improve your career, develop your leadership abilities, and build relationships within the legal field.

**How do I get involved?** Attend a meeting at any level. It is a great way to meet new people. Join a committee. You'll get to work with peers on an information basis on activities and events.

***Get involved now. Make a connection. Invest in YOUR FUTURE!***



## **Winners Make Things Happen**

Mary Smith, PP, PLS

Four reasons to join the Texas ALP 2009-10 leadership team:

- ÿ Strong commitment to education
- ÿ Professional certifications
  - ÿ Exceptional networking connections
  - ÿ Growth in professionalism

It has been said that everyone desires to succeed, but not everyone desires to ***prepare*** to succeed.

As we begin developing a leadership team for next year, I would like you, the member, to consider the following questions: What do you perceive as success - personally and professionally? How do you envision achieving this success? Who is responsible for the success of the association - the member individually or a team composed of individual members? When do you know success has been attained?

As you ponder the answers to the above questions, consider the following statement in a recent e-mail I received: "Winners make things happen - losers let things happen." My challenge to you is to prepare to become a winner not only by seeking out opportunities to promote the benefits our tri-level association but by seeking a position within the leadership team in which you can develop your personal skills and contribute to the success of Texas ALP.

The committee preference sheet is on the Texas ALP Web site (just click the link *Leadership Opportunities*). You may complete it and forward it to me or contact me directly at 254-755-4100 or [mary@namanhowell.com](mailto:mary@namanhowell.com). Please let me know how you would like to benefit the 2009-10 leadership team!



## The Digital Docket

Sharon J. Lee

As most of you know, some members have expressed an interest in receiving *The Texas Docket* electronically. If you would like to receive your copy by e-mail in a fully searchable PDF format rather than snail mail, please let us know: [sharonl@andersonjoneslaw.com](mailto:sharonl@andersonjoneslaw.com). The next issue of *The Texas Docket* will be coming your way in mid-July. If you have any suggestions for articles, please feel free to share those ideas with the Docket committee.

## Treasurer Tidbit

Kristy Turner, PP, PLS, CLA, TSC-CL, TSC-RE

All chapters are responsible for filing some version of the IRS Form 990 beginning this year and every year hereafter. Your chapter may need to file Form 990-N also known as the Electronic Notice (e-Postcard), Form 990 or Form 990-EZ. If your chapter's gross receipts are normally \$25,000 or less (which applies to most of us), you qualify for Form 990-N. Regardless of the form your chapter files, the forms are due by the 15<sup>th</sup> day of the fifth month after the close of the tax period. Since our fiscal year ends on April 30, the forms



are due on or before September 15. If your chapter needs assistance filing the form, please consult a tax professional of your choice. May the force be with you on the first filing!



## Read and Ride

All members who read this issue of the *Texas Roundup*, answer the following six questions, and submit **the correct answers to all six questions** to Betty Wells, Vice President/Membership Chair at [bettywe11s@austin.rr.com](mailto:bettywe11s@austin.rr.com) and Mary Smith, President-elect at [mary@namanhowell.com](mailto:mary@namanhowell.com) will receive a punch on their virtual ticket to The Texas ALP Train 2008-9 to Tomorrow! The member accumulating the most virtual ticket punches will be announced at the 2008 Annual Meeting. All members, including officers and chairmen, are eligible to participate.

The questions for this issue are:

1. What is the registration deadline for the 2008 Fall Board Meeting?
2. Which chapter is celebrating its 50<sup>th</sup> anniversary in July?
3. What IRS form is required to be filed by all local chapters this year?
4. By what date are proposed Bylaw and Standing Rule amendments due to the BL/SR Chair?
5. What remaining items does the Finance Committee have for sale?
6. What are two reasons to join the Texas ALP 2009-10 leadership team?