TEXAS ROUNDUP

September 2008

A Message from the President
Leslie Stokes, PP, PLS, TSC

Are You Getting the Most Bang for Your Buck?

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Happy Anniversary

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Tina Hurley, PP, PLS

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Treasurer
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TSC-CL, TSC-RE

Should It Stay or Should It Go?

Read and Ride
Elizabeth G. Wells, PP, PLS, TSC

And the Answer Is...

Are You Getting the Most Bang for Your Buck?

Are your getting the most bang for your membership bucks? Start making your dues work for you today! The following are four ways to profit from your investment in our association. It's never too late to increase the benefits to you by involving yourself now.

D = Develop professional connections

Become active on every level (NALS, Texas ALP, local chapter) and you will have a ready network of colleagues you can call for advice when you are faced with unexpected challenges in your job.

U = Unique and customized professional development

Join us as we hone our leadership knowledge and skills. You can expand and increase your leadership expertise at both the 2008 Fall Board Meeting and the 2009 Annual Meeting.

E = Exceptional education seminars

Are you getting the CLE you deserve? Take advantage of the legal education seminars Texas provides for you. Check out our Web site for details of the 2008 Fall Board Meeting, September 19-20, in Wichita Falls.

S = Supporting your needs

Texas ALP offers support to all members to expand and enhance your career development. Our first and foremost responsibility is to meet your needs through continuing legal education, networking prospects, and professional development.

So, make every penny count and get involved—***today***!

Leslie Stokes, PP, PLS, TSC

Dates to Remember

TEXAS ALP

September 15	Deadline to file IRS Form 990
September 19 - 20	2008 Fall Board Meeting and Educational Conference Wichita Falls
October 15	Deadline to submit nominations for 2009-10 officers

October 20	Deadline to submit article for November issue of the *Texas Roundup* to Mary Smith

NALS

September 9	Online Study Group ∗ 8 p.m. Central ∗ ALS Review
September 11-14	NALS 57th Annual Education Conference and National Forum Norfolk, Virginia
September 16	Online Study Group ∗ 8 p.m. Central ∗ PLS Review
September 17	Online Learning Session ∗ 8 p.m. Central ∗ Test Taking Tips
September 23	Online Study Group ∗ 8 p.m. Central ∗ PP Review
September 27	NALS PP/PLS/ALS exams
October 1	Online Learning Session ∗ 8 p.m. Central ∗ I'm Leaving on a Jett
October 15	Deadline to submit application for December NALS ALS exam for Legal Training Class
October 15	Online Learning Session ∗ 8 p.m. Central ∗ Document Management
November 1	Deadline to submit application for Jett Award
November 5	Online Learning Session * 8 p.m. Central * Industry Update

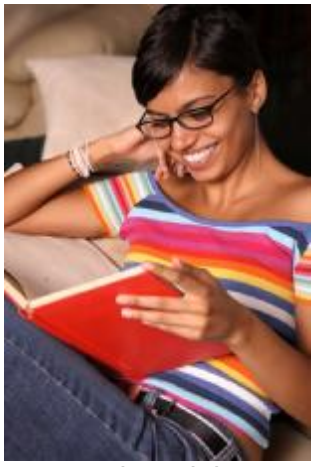
HAPPY ANNIVERSARY

September 8	Congratulations to Midland LSA on your 47th Anniversary
September 19	Congratulations to El Paso County LSA on your 40th Anniversary
September 22	Congratulations to Waco LPA on your 52nd Anniversary
October 28	Congratulations to Austin LSA, Inc. on your 48th Anniversary
October 30	Congratulations to Corpus Christi ALP on your 55th Anniversary
November 2	Congratulations to Dallas ALS on your 56th Anniversary

What is NALS Certification?

PLS Exam

Tina Hurley, PP, PLS



<u>Currently the ALS and PLS certifications are the *only* ACE Certified Exams dedicated to the legal industry</u>

Do you have a few college hours and are possibly thinking about going back to get your degree? According to the NALS Web site, "In April 2002, NALS® successfully completed the five-year reevaluation of the PLS examination by the American Council on Education (ACE). A team of content and technical experts selected from college faculty by ACE reviewed the PLS and ALS examinations and concur that the examinations are eligible for college-level credit recommendations. (Professional Paralegal certification accreditation is currently in process.) It is possible to earn up to 27 college-level credits. Although ACE makes the recommendation, it is

up to the college or university you select to make the final decision on the number of credits awarded." If you are interested in more information on this subject, please visit the NALS Web site: www.nals.org/certification/collegecredits.

You may also visit the NALS Web site (www.nals.org) to determine for each certification the qualifications, the test dates, costs, the application, etc. Following is a brief summary of the PLS exam; the PP exam will be discussed in a future issue of *The Texas Roundup*.

"PLS. . . the advanced certification for legal professionals – A Career Goal"

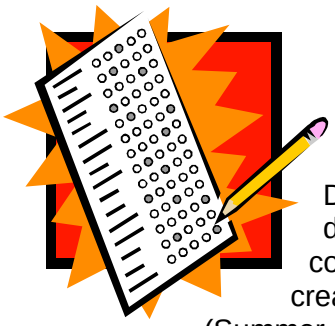
PLS® is the designation for lawyer's assistants who want to be identified as exceptional. Certification is received after passing a one-day, four-part examination that demonstrates not only dedication to professionalism but acceptance of the challenge to be exceptional. Personal motivation is necessary to attain such a goal.
The one-day, four-part examination consists of:

- PART 1: Written Communications
- PART 2: Office Procedures and Technology
- PART 3: Ethics and Judgment
- PART 4: Legal Knowledge and Skills

Passing this examination and being awarded the PLS certification certifies that you as a lawyer's assistant possess:

- A mastery of office skills.
- The ability to interact on a professional level with attorneys, clients, and other support staff.
- The discipline to assume responsibility and exercise initiative and judgment.
- A working knowledge of procedural law, the law library, and how to prepare legal documents.

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



CERTIFICATION QUIZ

Do you find it difficult to obtain the hours necessary to recertify your designation? In an effort to provide yet another opportunity to obtain continuing legal education, the Texas ALP Certification Committee has created the following quiz based upon the articles in the latest Docket (Summer 2008-09). You may obtain one hour of certification points/continuing legal education credit by correctly answering at least 75% of the questions and mailing your answers to the Texas ALP Certification Committee (c/o Tina Hurley, PP, PLS, Haynes and Boone LLP, 901 Main Street, Suite 3100, Dallas, Texas 75202; you may also e-mail your

answers to tina.hurley@haynesboone.com). There is no charge for members; however, nonmembers need to include a check for $5 with the quiz. The Texas ALP Certification Committee will issue the certificates for correctly completed quizzes submitted.

Docket Quizzes – Summer 2008

A) Fair Debt Collection - Focus on Credit

1. What agency has the authority to administratively enforce the Fair Debt Collection Act?
2. Is money owed for medical care covered under the Act?
3. True or False: Debt collectors are allowed to send collection notices by postcard.
4. Where can you report a debt collector for an alleged violation?

B) U.S. SEC - How it Protects Investors

5. Who was appointed to serve as the first chairman of the Securities Exchange Commission?
6. Where is the SEC agency headquartered?
7. The Securities Act of 1933 is often referred to as the "_____" law.

C) Ethics Through the Eyes of a Non-lawyer

8. True or False: The supervising lawyer could be disbarred depending on the severity of the unethical conduct of the non-lawyer.
9. UPL stands for what?
10. Who should you contact to request UPL provisions and guidelines for non-lawyers?

Volunteer - Be a Pal

Jane Harrison, PLS

The registration form for the 2008 Fall Board Meeting and Education Conference was the second form to have a checkbox for "I want to be a Texas ALP PAL." And I hope it works as well as the first. We had more volunteers than we had First-Timers – and I want to extend a sincere Texas-size THANK YOU to all who volunteered. If you have not sent in your registration form, please take a moment to check the box to be a PAL.

Attached is a portion of the Guidelines that is included in the e-mail sent to First-Timers. I think we could all read it and put some of the information to good use.

Who is invited to attend the Welcome Reception?

Everyone! This is a great time to meet and greet your fellow conference attendees and Texas ALP members and guests. This event provides a time for networking and fun.

Is the business meeting something I should attend?
Yes, definitely. The Texas ALP Board of Directors consists of the Texas ALP Officers and an elected Director for each local chapter. While most attendees are not voting board members, you will be informed on Texas ALP decisions and matters of importance to every Texas ALP member. But please – while you are in the Board/Annual Meeting (or any of the CLE seminars), either turn your cell phone off or put it on vibrate.

What is the Professional Development event?
The Texas ALP Professional Development Committee plans the event, which is held during each conference. There may be any number of exciting activities planned for you, such as entertaining speakers, round-table discussions, brainstorming, and other interactive activities designed to help you become a better leader in your association.

COME TO OUR 50TH

ANNIVERSARY CELEBRATION!!!!

Dianna C. Roberts, PLS, TSC

Please join us as we celebrate our 50th Anniversary during the 2008 Fall Board Meeting in Wichita Falls! Six hours of CLE will be presented - the topics include real estate, personal injury, ethics in mediation, criminal law, and federal law update. Homewood Suites provides 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), 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 50th Anniversary.

If you will be flying into Wichita Falls and need a rental car, Kelly Montoya will be pleased to help you obtain a vehicle for use during your stay. Please contact her at the number listed below.

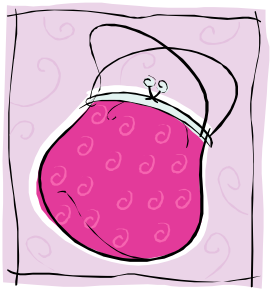
Company Name: Enterprise Rent-a-Car
Location: 2001 Old Jacksboro Hwy, Wichita Falls, TX 76301
Corporate Account Number: TXC2430
Contact information: Kelly Montoya - 940-767-0176

RATES: Mid Size/Standard Size: $30.00/day (cruise control)
Full Size: $33.00/day (cruise control)
Minivan: $49.00/day (cruise control)
SUVs: $56.00/day (cruise control)

MILES: Unlimited

What's New?

Kathie Keys, PP, PLS



The Finance Committee is excited to announce that the following new items are available for purchase: logo lapel pins, logo bookmarks, logo magnets, logo padfolios, coasters (set of four), photo CD of 2008 Annual Meeting, and logo t-shirts. We also still have logo picture frames. Remember, for every order that is received from May 5, 2008, through end of Board Meeting September 20, 2008, the name will be placed in a drawing with the winner announced at the Saturday night event at the 2008 Fall Board Meeting in Wichita Falls, Texas***. If you can't wait that long to purchase the new items at the Fall Board Meeting, an order form is included with this Roundup.***

The Best Tool

Jorie Licking, P, PLS

Did you know that you are the best tool your local chapter has for marketing? All you need to do is to tell your co-workers what your favorite thing about TALP is and then invite them to the next meeting to see for themselves.

CHECK IT OUT:

If you haven't been to the NALS site lately, there is a lot of new material to take advantage of to help you in marketing your chapter. NALS Powerpoint Virtual Tours are available to help you in building your chapter and in selling NALS to your employers.

You can find out more at http://nals.org/marketing/index.html.

It's YOUR Future!

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

Texas ALP 2008-09 Train to Tomorrow Now Arriving in Wichita Falls

The first period of the membership campaign has come to a close and our membership train is making a brief stop in

Wichita Falls September 19-21, 2008. Rail riding members will be recognized and rewarded for their involvement in our association from May 1 through August 31.

While the train is at the station, please be sure to find Engineer Wells and the Conductors able to join us at this station. At this meeting, the train crew will be available to punch your virtual ticket for:

- Attending a Texas state meeting,
- Being a PAL,
- Wearing your chapter or certification pin(s) to a Texas state meeting,
- Donating a raffle item (one punch per item) for a Texas ALP raffle.

The punches received at this brief stop will be added to punches members may have previously received and will count toward the cumulative total for recognition during our final stop at the annual meeting in Waco, Texas in May 2009.

Welcome to the 2009-10 Leadership Team

Mary Smith, PP, PLS

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

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

When you hear the words “leadership team,” what do you envision? In an article written by Lee Iacocca, former chief executive officer of Chrysler Corp., he states that in a successful organization what matters is the team. His definition of a team is ***a leader surrounded by great people***.

Teams work because everyone brings unique talents, experiences, and personalities to the task at hand. The role each person plays is vital to the functioning of the team and certain qualities are necessary in order for the team to perform properly.

A leader must have a vision and a determination to do whatever it takes to achieve that vision. She must be decisive but flexible, have confidence in those she has chosen, see challenges as motivation, understand what is essential and ignore the rest, and be proactive rather than reactive.

Members must be self motivated, understand the goals, be willing to explore new ideas, and have a desire to give back. They must see themselves as a vital part of the planning and problem solving process.

And of paramount importance is communication - between the leader and the members and among the members themselves. Understanding one's role in relationship to the whole lays the foundation upon which the team can work together in achieving its goals.

A wise man once said that all we really have at the end of our lives is the relationships that we have had with others. Working with your fellow member on a committee to obtain a common objective not only accomplishes that purpose but builds personal relationships that last a lifetime.

Texas ALP is YOUR organization, not hers nor theirs, but YOURS. What do YOU want to gain from your membership? What do we need to start doing or stop doing that will benefit you and make our association sought after by non-members? How can YOU help us achieve those goals?

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 by seeking a position within the leadership team in which you can develop your personal skills and contribute to the success of Texas ALP. We need you!!

Have you filed your flight plan for 2009-10? You may do so by completing and forwarding to me the committee preference sheet posted on the Texas ALP Web site. Please contact me (254-755-4100 or mary@namanhowell.com) if you have any questions. Just click on *Leadership Opportunities* to join your fellow members on the 2009-10 journey to Destination Success.

The Voice of Leadership: How Leaders Inspire, Influence, and Achieve Results

(Part 1)

Julie Abernathy, PP, PLS
NALS President-Elect

We've all heard it – you're not born a leader, but you learn to be a leader through actions of others, a desire to be a leader, or simply – no one else will do it, so I guess I will.

What makes a good leader? To be quite honest, commitment and desire. I have been a member of NALS since 1975 – yes, that's long before some of you were born. But back in 1975, did I aspire to one day become NALS president? No way. I was a young mother, then a single mother, who was committed at that point in my life to raise my two small children, get them through high school, into college, married, and become a grandmother. Most of those things have happened in the past 30 years, but obviously there were bumps along the road.

What then made me desire to become a leader? Probably that last reason above, "no one else will do it." That desire all started, of course, on the local level. I began my NALS journey in Waco, Texas and served as Corresponding Secretary and Welfare Chair. Two years later, my husband's job transferred him to Austin, thus I transferred my membership to the Austin chapter. Coming into a new chapter was obviously very overwhelming. I was the new kid on the block. I was bound and determined to jump right in, make new friends, get my feet wet, and be an active member there as well. But again – what got me to become a leader? Learning by example. We all learn by example. I aspired to become a chapter president after watching and admiring leaders in my local chapter. When I was able to participate on the state level—again, I watched, admired and yearned to "be just like them." Or as someone recently said to me "When I grow up, I want to be just like you." Once bitten by the leadership bug, there are endless opportunities to develop those leadership skills. Obviously most leadership skills are accomplished in our multi-level Association, while others may branch out into our civic duties, churches, children's schools, etc.

In fact, a recent survey printed in *The Washington Post* on March 27, 2008 states that "youths defined leaders as people who prize collaboration, stand up for their beliefs and values, and try to improve society." Coming from our young adults, I love their concept of leadership.

Another interesting quote I've recently come across is from Joyce Brothers: "The person interested in success has to learn to view failure as a healthy, inevitable part of the process of getting to the top."

The majority of leaders in our Association start by working on a committee. Then they are asked by the president, or incoming president, to chair a committee. They get the bug– sometimes called "NALSitis" and aspire to run for an office, work their way up, and eventually become president. Why do we have this desire to achieve the "top" of our careers? Drive, determination, success, ambition, "are you crazy," and even a lack of better judgment (what was I thinking?). But all-in-all it is very rewarding. Although challenging at times, the end result is satisfaction, self-worth, ability to stand and speak to a group of people, and knowing you provided one small piece of historical information in your chapter.

But, do we do this for glamour, recognition, and fame? Of course not. We do this because we can. Because we watch others in our chapters and think – I can do that. We do this because it gives us confidence. We do this because we make friends. We do this because we love the networking we achieve, which ultimately assists us in our careers as legal professionals. Period.

Okay, you ran for office, got elected, liked what you were doing, decided to run for the next step up, got elected, caught the NALSitis bug, and here you are now a chapter president. Oh my. **How can I get everything done, keep it all organized, carry myself as unbiased, and yearn for the end of my term?**

The answer to this question will be revealed in Part 2 of Julie's article in the next issue of the *Texas Roundup* - stay tuned.

Should it stay or should it go?

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

As Treasurer of your association, you get to be the keeper of all important papers. YIPPEE! Often times it is difficult to determine what is not so important and what you really need to keep. I have a few helpful tips when you inherit those dreaded boxes of papers.

Copies of filed tax returns (990N, or otherwise), tax and legal correspondence (IRS determination letter, franchise tax exemption, etc.), financial review reports (all chapters should have a financial review completed annually), and general ledger and journals should be kept **FOREVER!**

Bank statements, deposit slips and cancelled checks may be disposed of after seven years.

Sales records and journals, other revenue records, paid vendor invoices, inventory records and other records relating to expense may be disposed of after six years.

This is not a complete list of what to keep and get rid of, but it is a start. For additional information, please contact an accountant of your choice or the IRS at www.irs.gov.

While keeping these documents may be an inconvenience for you today, your association will be grateful to you in the future!

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 and Mary Smith, President-elect at mary@namanhowell.com will receive a punch on their virtual ticket to The Texas ALP Train 2008-09 to Tomorrow. The member accumulating the most virtual ticket punches will be announced at the 2009 Annual Meeting. All members, including officers and chairmen, are eligible to participate.

The questions for this issue are:

1. What are two ways to profit from your investment in our association?
2. What is the cost to members to obtain credit for the Certification Quiz included in this Roundup?
3. What are three logo items that will be available at the FBM in Wichita Falls?
4. What is the best tool your local chapter has for marketing?
5. What are two reasons to join the Texas ALP 2009-10 leadership team?
6. How long should you keep copies of filed tax returns in your permanent files?

Texas Association of Legal Professionals

Affiliated with NALS . . . *the association for legal professionals*

FINANCE ITEMS

Get your Finance Items!

ITEM	PRICE	QUANTITY	TOTAL
Logo Lapel Pins	$7.00		
Logo Bookmarks	$1.00		
Logo Magnets	$1.00		
Logo Padfolios	$25.00		
Coasters (set of four)	$3.00		
Photo CD of 2008 Annual Meeting	$20.00		
Logo Picture Frame	$10.00		
		Subtotal	
		Shipping and Handling (*see chart below*)	
		TOTAL DUE:	

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone: _____ E-mail address: _____

Please send check payable to "Texas ALP" and a completed form to:
Kathie Jean Keys, PP, PLS, 615 N. Upper Broadway #1100, Corpus Christi, Texas 78477
If you have any questions, call 361-888-9201 or e-mail to kathie@wbwpc.com

Product Cost Total	Shipping Cost Regular Mail	*Product Cost Total*	Shipping Cost Regular Mail
$0.00-$15.00	$4.80	*$65.01-$95.00*	$11.95
$15.01-$30.00	$6.75	*$95.01-$125.00*	$13.25
$30.01-$45.00	$8.25	*$125.01 +*	$16.25
$45.01-$65.00	$10.25		