



# The Texas Docket

[www.texasalp.org](http://www.texasalp.org)

December 2023-January 2024  
Volume 21, Issue 3



***HAPPY HOLIDAYS FROM TEXAS ALP!***

**Editor**

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# *The Texas Docket*

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## PRESIDENT'S MESSAGE

Hello Texas ALP,

I hear the clock ticking...tick...tock....Time is flying. Everyone is busy; just remember to stop and reflect on you, your family, and your friends. We all seem to overlook the “little” things, but those are the most important things in life.

It was so much fun to see everyone in San Antonio. SALSA did a fantastic job on the conference. Their hard work and dedication made it one to remember. So much knowledge was shared and my heart and head were full. I also got a taste of what TALP really means...the support and love that I encountered is something that I will never forget.

Now it is time to start the preparations for the Annual Conference in Waco. Donna Dendy and Emily Folsom are busy planning away, and I know that Laura DeLeon will have a party to remember. The Annual Conference will be held on **April 5-6, 2024**. Get your registrations in soon and book your rooms.

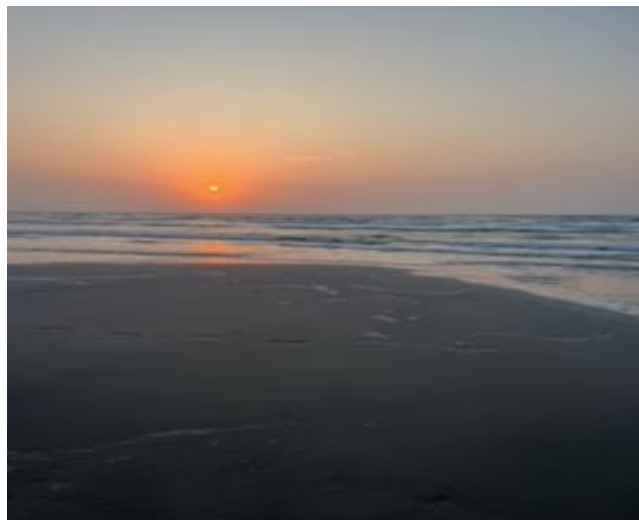
If there is anyone who has any interest in a chair position, please reach out to Laura DeLeon. I promise that serving TALP can be very rewarding and fulfilling.

Keep following the “Footprints in the Sand” for they will lead wherever you want to go.

Much love to all,

*Michelle*

Michelle McDaniel,  
President



## TAKE SOME TIME

Well, it is that time of year again. Is it just me or does it seem to be going at warp speed? And now that we are at the holiday season, I am sure that it is going to ramp up. Everyone is always busy and, if you are like me, nothing seems likely to slow down any time soon. However, I want to remind and encourage you to remember to take the time to enjoy whatever season of life you are in personally, professionally, and socially.

Personally, I want to encourage you to take time for yourself. Most of us are the “ringleader” type personality, so we often neglect ourselves. If you need to listen to music or a podcast, exercise, meditate, have dessert or whatever it is that you enjoy, make sure that you are taking care of yourself. If you are not taken care of, it is harder to take care of others.

With that being said, professionally we are the caregivers of others. Remember to take time to appreciate the rapid pace of litigation, overflowing emails, endless to-do lists, and continually ringing telephone. The opportunity to serve so many people is sometimes a blessing and a curse, right? Just try to remind yourself that it is better than the alternative, and we should take time to appreciate that we are all capable of doing these jobs. We are glad to have the demands that allow us to continue to grow and learn in the legal field.

Socially, people will be scrambling to get all their things done and completed for the holidays or end of the year. Take this time to be a little more patient, helpful, or empathetic to others. Help where you can. Many hands make light work. Even when you don’t think you are contributing very much that little bit could be the difference between success and failure.

Everyone is busy, but make sure to take some time to slow down so that you can embrace and appreciate what you have. Happy holidays to you all. Wishing you a *Dazzling* new year.

Laura DeLeon  
TexasALP President-Elect





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## **CLE @ Noon—Texas Style**

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*Topic—*

### Corporate Transparency Act

*Synopsis—*

This new federal law is aimed at increasing transparency in corporate ownership, and it requires certain companies to disclose beneficial ownership information to the Department of Treasury. You will learn about the types of information that must be collected and maintained, as well as the potential consequences of non-compliance.

*Speaker—*

Michael A. Roy, Esq.  
Crain, Caton & James

*Where—*

Zoom

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*CLE Credit—*

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*Cost—*

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**For more information, contact:**

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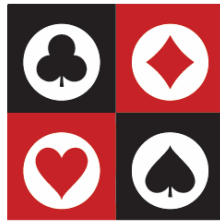
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## TALP HUGS

Through TALP Hugs, we share information among the distribution list members about others who may need a card, a phone call, or other special attention. It may be that they are going through an illness or a death in the family or it could be a joyous occasion such as a marriage or the arrival of a new grandchild. Whatever the occasion, the information shared comes from the member or someone close to the member.



Participation and inclusion in the distribution is strictly voluntary. Because we changed our host last year, the original Hugs list was lost and we are beginning again with the TALP e-distribution list. Going forward, the TALP Hugs distribution list will be separate from the TALP e-distribution list and will be maintained separately.

**Should you wish to be removed  
from (or included in) the Hugs distribution,  
please contact me at: [hugs@talp.org](mailto:hugs@talp.org)**

Tina Hurley



## Calling All Members for 2024-2025

On behalf of Texas ALP, I welcome you to join the Texas ALP Leadership Team. There is a place for you on a Texas ALP committee and your time, talent, and experience is necessary to further the mission of Texas ALP in providing quality legal training and education for the legal support professional.

Below is a list of the Texas ALP Standing Committees that are necessary for the successful operation of Texas ALP. The reward of “*service*” is life changing and a great opportunity for you to support your local community and our tri-level association, so please say YES!

I am excited to have you serve on the 2024-2025 Texas ALP Leadership Team and look forward to the coming year.

**YES! I want to be part of the 2024-2025 Texas ALP Leadership Team!!**

**Name:** \_\_\_\_\_

**Chapter:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**I would like to serve on the following committee(s) and have designated my choice(s):**

✓	Committee/Chair	✓	Committee/Chair
	Awards		Membership
	Bylaws/Standing Rules		Nomination & Elections
	Certification		Planning
	Communications		Professional Development
	Education		TALP Hugs
	Financial Review		The Texas Docket
	Fundraising		Webmaster
	Marketing		2023 Fall Conference
	Meetings Coordinator		2024 Annual Meeting

Please contact Texas ALP President-elect Laura DeLeon (email: [ldleon@zlawhelp.com](mailto:ldleon@zlawhelp.com) or (254) 644-3517 (cell) with any comments or questions you may have.

Thank you for your support!

*Laura*

**SEE NEXT PAGE FOR DESCRIPTION OF COMMITTEE DUTIES**

# COMMITTEE DUTIES

**AWARDS:** Coordinate Texas ALP Scholarship and LPY award presented at Annual Conference. Work with host chapter for conference to obtain judges for award.

**BYLAWS/STANDING RULES:** Review bylaws and standing rules for necessary changes and maintain conformance with NALS bylaws/standing rules. Issue call for proposed amendments and furnish proposed amendments to EC. Provide proposed amendments to Secretary for distribution with the Calls to Annual and Fall Conferences.

**CERTIFICATION:** Answer all inquiries regarding NALS certification programs and promote certification by providing articles for *The Texas Docket*. Work with Marketing to furnish press releases for those passing certification exams or recertifying. Work with host chapter to recognize members successfully completing exams during Recognition Luncheon at Annual Conference.

**COMMUNICATIONS:** Responsible for email dissemination of official business. Maintain official roster and mini-roster. Obtain current rosters of officers from local chapters and provide them to NALS Resource Center. Coordinate list of members eligible to vote with Treasurer, who will certify and submit the list to Nominations and Elections Chair.

**EDUCATION:** Plan and coordinate legal education seminars sponsored by Texas ALP. Prepare CLE certificates for each meeting and work with host chapter to obtain speakers. Encourage local chapters to plan legal education study courses and provide assistance when asked. Provide education articles for each issue of *The Texas Docket*. Work with Marketing to promote seminars, official courses, and educational materials.

**FINANCIAL REVIEW:** Review financial records of the Treasurer, Fundraising Committee, Fall Conference, and Annual Conferences; verify all receipts and disbursements; and provide financial review report covering such books to the EC and at the Board and Annual Meetings.

**FUNDRAISING:** Devise ways and means of raising funds. Develop and market Texas ALP logo items approved by the EC and make items available for purchase at all functions. Coordinate and promote Texas ALP raffles.

**MARKETING:** Assist Membership in marketing and advertising benefits of membership. Develop and maintain promotional packets, as well as the Texas ALP brochure, for distribution to local bar associations and local chapters. Work with Certification to announce names of people passing certification exams and

recertifying. Work with host chapters to provide press releases about each TALP function and assist local chapters with their Day-In-Court observance events. Promote all seminars and events and provide materials for publication in *The Texas Docket*.

**MEETINGS COORDINATOR:** Encourage and assist local chapters to bid to host board or annual conferences. Act as coordinator between the President, EC, applicable chairmen, and hosting chapter in implementing scheduled conferences. Prepare and keep current the Guidelines for Bidding an Educational Conference and Guidelines for Planning an Educational Conference.

**MEMBERSHIP:** Receive and promptly answer inquiries about membership. Develop, implement, and evaluate membership campaigns approved by Texas ALP. Act as liaison with local chapter membership chairmen. Assist Marketing with promoting and marketing benefits of membership. Submit articles and membership campaign information for publication in *The Texas Docket*.

**NOMINATIONS & ELECTIONS:** Issue the call for officer nominations. Obtain consents-to-run from officer nominees, prepare and update candidate profile forms, and provide profile forms and photos to Webmaster. Conduct online voting. Responsible for announcing newly elected officers after certifying election results with President. Prepare ballots and teller reports for use at board and annual conferences.

**PLANNING COMMITTEE:** Monitor and update strategic plan annually and help facilitate planning process through consultation with Treasurer and EC about funds available for implementation. Committee is to be composed of four members, including an experienced member, an officer of Texas ALP with at least one year as an officer, a member under the age of thirty-five, and a new member.

**PROFESSIONAL DEVELOPMENT:** Plan and coordinate leadership and professional development workshops at Texas ALP conferences, local chapter workshops as requested, and prepare leadership articles for *The Texas Docket*. Help plan a luncheon program at each educational conference.

**THE TEXAS DOCKET:** Prepare and distribute each issue, work with officers and chairmen to contribute articles for publication, and secure advertisers and advertisements appropriate to the legal field.

**WEBMASTER:** Keep Texas ALP Website current with information provided by various committee chairs as approved by the President. Receive and publish *The Texas Docket* upon approval of President.

# PROFESSIONAL DEVELOPMENT

Submitted by Laura Powers with permission by Paralegal Connect

## Is the Job Right for You?

### 5 Must-Ask Questions!

By: Tami Riggs



In any job search you will be screened, judged, and measured against other applicants. Employers want the ideal candidate, the perfect addition, and the right fit.

They are sizing you up – looking for standout traits, specific qualities, education, and experience which demonstrate you are capable of performing the duties assigned to a particular role. Seek out any career counseling professional, recruiter for coaching, or conduct an internet search, and you will have unlimited access to countless training resources. They will break down the anatomy of an interview and offer suggestions for what to wear, what to bring, and how to “wow” a potential employer. Everything you need to increase your chances for success and not tank in the process is at your fingertips.

**Being prepared for an interview is important.** Employers want to know that you are a good match for them and that you will be able to make meaningful contributions. A job offer is unlikely if you have done zero homework on the opportunity, show up late, fail to look the part, or are unable to articulate how your skills and accomplishments could translate to the role.

**It is equally important to determine whether a potential employer is a good match for YOU!** Every company will have a different organizational structure and personality. Fleshing out the nuts and bolts of a new position requires more than a review of the job description, pay scale, and benefit package.

**Use the interview as an opportunity to gauge the potential employer’s ability to meet your needs.** The meeting is as much for you as it is for them. Make note of your observations and when given the opportunity for questions, ask the ones that will help you decide whether or not to take the job if it is offered. It is important to get an overall feel for the office culture, the challenges, and the benefits of working for an organization. The interview is a two-way street and you should walk away confident in your ability to fit in and be successful.

### 5 Key Questions to ask During an Interview:

- 1. Is the position open due to an internal promotion?**  
What you are trying to glean from this question is whether the company is adding jobs or if the role was recently vacated. If several people have left a position it might indicate volatility. A newly created position can be equally risky, especially if performance expectations are poorly defined, or if the company is unsure about a permanent addition to their team. However, it could also signify company growth and a great opportunity to start or advance your career. Asking this question will usually reveal if there is upward mobility or opportunities to progress within an organization.
- 2. What is your onboarding process?**  
This should not be confused with orientation. What you want to know is if there is a plan to help socialize new employees and assimilate them to company policies and workflow. A deeper dive should give you information on how learning and improvement are supported. Mentorships, job shadowing, cross-departmental training, and professional development can be positive indicators that the organization places emphasis on growing their employees and retaining them long term.
- 3. What is the most important thing you would expect me to accomplish in the first 30 days, 60 days, 90 days, 6 months, and/or year?**  
This question is designed to give you information on the exact goals an organization has for a role, expectations which need to be met, and results which need to be delivered. Not only will it give clues as to the workload volume and associated deadlines, but it will also provide some specific insights into what the work-life balance may look like.

**4. How will I receive feedback regarding my performance during the introductory period and thereafter?**

Post-hire check ins and evaluations are important. They provide opportunities to review accomplishments, discuss areas where improvement is needed, set goals, and plan future actions. Employers who incorporate staff support, career development, and regular performance discussions demonstrate that they are committed to your professional growth, happiness, and success.

**5. Would you be able to show me around the office? Observe the physical environment.**

Cluttered or dirty areas can be an indicator of company disorganization. Just like a person's appearance, the appearance of an office makes an important first impression and speaks volumes about its culture and work style. If possible, check out the meeting room, lunchroom, breakroom, and washroom. Are these areas in disarray? Often, there is a negative relationship between messiness and productivity.

Consider the greeting you receive and how employees speak to you and others. Are they open and friendly or rude and abrasive? Is their tone formal or informal? A warm and inviting reception by staff who are encouraged to converse and engage with you is ideal. How they interact with each other is equally important.

**Assess employee morale and non-verbal communication.**

Are employees smiling and communicating behind closed doors? Do they appear to be on task or completely overwhelmed? Non-verbal cues and body language convey important interpersonal and emotional messages about office dynamics and job satisfaction. If they are negative it can signal upspoken issues and other problems, such as slow business, inadequate staffing, or disengagement.

**Present yourself as someone who wants a legal position.**

This means showing up on time for the interview dressed appropriately with a resume that reflects your training and background. Ask questions so that you understand the role, the firm, it's organizational and cultural structure and how you would be a good fit for the job. Finally, mail a thank you note after the interview.

Not only is the prospect for more jobs apparent, but as new practice areas also evolve to address emerging issues, a variety of new and different jobs are anticipated on the legal landscape. The scope of work for paralegals is expanding and the outlook is bright. Paralegals have been in high demand and will likely remain so for the foreseeable future.

About the Author:

Tami Riggs is Director of Outreach and Career Services at Center for Advanced Legal Studies in Houston, Texas. She has an extensive and varied professional background that spans criminal justice, paralegal education, and international school marketing and communication. Her career has been guided by a focus on developing strategic partnerships that facilitate school growth and student opportunity. She holds a Bachelor of Science Degree in Criminal Justice from Texas State University. Connect with Tami on LinkedIn.



**PROFESSIONAL DEVELOPMENT**  
**5 Benefits to Joining a Professional Association**  
**Submitted by Michelle McDaniel**

With the number of responsibilities that we juggle on a day-to-day basis, it's likely safe to assume that joining a professional member-based organization is fairly low on the priority list. It might even be hard to imagine that anyone would voluntarily sit through more meetings and activities after a full day of meetings at work. But the reality is that joining a professional organization will provide an invaluable wealth of knowledge, resources, and opportunities that you are otherwise missing out on.

### **1. Professional Development**

One of the greatest opportunities that professionals can find in an organization is the chance to invest in their professional development. Membership-based organizations provide members access to training, research material, and industry insights to help you grow in your field. When you join an organization like this, you are putting yourself on the cusp of emerging trends in your industry.

### **2. Networking Opportunities**

Expanding your Rolodex organically can be a long process. Professional associations provide better networking opportunities with people who are specifically in your industry. Whether you are looking to pursue employment opportunities, connect with other industry professionals, or even looking for a mentor within your profession, the networking opportunities are invaluable. The advantage of having networking opportunities within a professional organization is the potential wealth of resources and insight they could provide. The relationships you can build in a professional organization tend to be richer, giving you a deeper well to pull advice from.

### **3. Exclusive Online Resources**

There's nothing more exclusive than the "members only" online resources. With a membership to a professional association, you will have exclusive access to journals, articles, webinars, infographics, and message boards to add value to your professional growth and development. IAMC offers leadership training with our Leadership Development Program. This program enhances your personal and professional leadership skills. Once our members graduate this program, they are recognized as proven leaders who contribute to IAMC and their professions in significant ways.

### **4. Conferences**

Yearly events and conferences are a great way to get to know your fellow members. Network at events to grow your contact list and connect with some of the brightest minds in your industry. With IAMC, members get priority access to events and webinars at special rates and to get involved in Industry Groups, Committee Works, and the Recruiters Club. The more involved with an association you are, the more it will benefit your professional growth.

### **5. Education**

Many professional associations provide opportunities for their members to educate themselves on the best practices in their industry. Events and conferences are great opportunities for education, but some associations provide more personal opportunities for self-education with workshops, seminars, and online courses with industry leaders who have years of experience.

# Legal Education

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# Texas Association of Legal Professionals

## 2023-2024 Membership Campaign

May 1, 2023-March 31, 2024

(Official Tally Sheet Submission Deadline: March 31, 2024)

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### MEMBER CAMPAIGN

2 Footprints

- Each new individual or student member recruited
- Each new member reclaimed
- Each CLE article obtained for and published in The Texas Docket

5 BONUS FOOTPRINTS

- Each CLE article written for and published in The Texas Docket
- Participation in a mentoring program for members

20 SUPER BONUS FOOTPRINTS

- Each new advertiser obtained for The Texas Docket

### CHAPTER CAMPAIGN

2 Footprints

- Each new member the chapter or members bring into the Association
- Each past member the chapter or member reclaims
- Each membership drive held (in person or virtually)

5 BONUS FOOTPRINTS

- 100% retention of chapter members
- Each chapter brag published in The Texas Docket

20 SUPER BONUS FOOTPRINTS

- Each new advertiser obtained for The Texas Docket



PRIZES: 1st Place \$75.00  
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# CERTIFICATION NEWS!

News from Texas ALP  
Carol R. Gutierrez, PLS

Please help me congratulate **Laura Powers** who is our first Certification Campaign Winner for the May 1-September 1, 2023 time period. **Laura** wins \$50! Woo! Hoo!

Remember, Rule 3 requires you to email me at [cgut@scotthulse.com](mailto:cgut@scotthulse.com) if you want to be included in that drawing. The Official Rules are attached for your convenience and may also be found on the Texas ALP website.

## Certification Campaign Texas ALP (2023-24)

### OFFICIAL RULES

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Every member will have three (3) opportunities to earn \$50 as follows:

1. May 1-September 1, 2023 - Each member who renews a certification or obtains a new certification during this time period will be entered into a drawing for \$50.
2. September 2, 2023-April 1, 2024 - Each member who renews a certification or obtains a new certification during this time period will be entered into a drawing for \$50.
3. Every member who holds a certification through April 1, 2024, will be entered into another \$50 drawing under the following conditions (you **MUST** email me at [cgut@scotthulse.com](mailto:cgut@scotthulse.com) by April 1, 2024, stating that you want to be included in this drawing):
  - a. Each person will receive entry into the drawing as follows:
    - i. If you have been certified for more than 20 years, you will receive 3 (three) additional entries into the drawing.
    - ii. If you have been certified for more than 10 years, but less than 20 years, you will receive 2 (two) additional entries into the drawing.
    - iii. If you have been certified less than 10 years, you will receive 1 (one) additional entry into the drawing.

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**Houston ALP received its charter on January 25, 1956.**

**Lubbock LPA received its charter on March 1, 1958.**

**NALS of Amarillo received its charter on March 30, 1957.**

## **Credential Amnesty Period**

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NALS

The NALS Certifying Board will offer an amnesty period where those with expired credentials can apply for reinstatement, regardless of the reason for the lapse. Submissions will be accepted early January until the end of March. The ALP rate is \$100, CLP/PP is \$150.

CLE requirements are the same as the recertification guidelines, with ALP needing 50 hours and CLP/PP needing 75 hours (at least 5 of which must be in Ethics). CLEs must have been earned within a five-year time frame, prior to amnesty submission. Those unsure of their credential status can check the [Certified Professionals](#) list.

Questions? Contact us at [cert-edu@nals.org](mailto:cert-edu@nals.org).

## **Boston Legal – The Ethics of Denny Crane – The Pertinent Disciplinary Rules**

Submitted by Theresa Ann Alba, PLS

Rule 1.01(a) - a lawyer shall not accept employment in a legal matter that is beyond the lawyer's competence

Rule 1.01(b) - a lawyer shall not neglect a legal matter, or frequently fail to carry out completely the obligations owed to the client

Rule 1.02(a) - a lawyer shall abide by a client's decisions concerning the objectives of representation, including whether to accept an offer of settlement or a plea bargain

Rule 1.02(c) - a lawyer shall not assist or counsel a client to engage in criminal or fraudulent conduct

Rule 1.02(d) - when a lawyer has confidential information "clearly establishing that a client is likely to commit a criminal or fraudulent act that is likely to result in substantial injury to the financial interests or property of another," the lawyer shall make "reasonable efforts" to dissuade the client

Rule 1.02(e) - when a lawyer has confidential information "clearly establishing" that the client has committed a criminal or fraudulent act in the commission of which the lawyer's services have been used, the lawyer shall make "reasonable efforts" to persuade the client to take corrective action

Rule 1.03(a) - a lawyer shall keep a client reasonably informed about the status of a matter

Rule 1.03(b)- a lawyer shall explain a matter to the extent reasonably necessary to permit the client to make informed decisions regarding the representation

Rule 1.04(a) - a lawyer shall not charge an illegal or unconscionable fee

Rule 1.04 cmt. 5 - When there is a doubt whether a particular fee arrangement is consistent with the client's best interest, a lawyer should discuss with the client alternative bases for the fee and explain their implications.

Rule 1.05 – confidentiality - a lawyer shall protect and not disclose or use confidential client information unless a specific exception applies authorizing disclosure or use

Rule 1.06(b) - conflict of interest: general rule - unless the client(s) provide informed consent under paragraph (c), a lawyer shall not represent a person if the representation (1) involves a substantially related matter in which that person's interests are materially and directly adverse to the interests of another client of the lawyer or the lawyer's firm; or (2) reasonably appears to be limited by the lawyer's or firm's responsibilities to another client or person or by the lawyer's or firm's own interests

Rule 1.08 - a lawyer shall not enter into a business transaction with a client unless certain specified conditions are met

Rule 1.09 - conflict of interest: former client - without client consent, a lawyer who has represented a former client in a matter shall not then represent another person in a matter adverse to the former client that is the same or substantially related or that would likely cause a violation of client confidentiality

Rule 1.12 - addressing how a lawyer is to deal with a corporation or entity (e.g., government client)

Rule 1.15(a) - a lawyer shall withdraw from representation if the representation will result in a violation of any rule of professional conduct or other law, or if the lawyer's physical or mental or psychological condition would materially impair the lawyer's fitness to represent the client

Rule 1.15(d) - upon termination of representation, a lawyer shall take reasonably practicable steps to protect a client's interest, such as giving reasonable notice to the client, allowing time to employ other counsel, or surrendering client property

Rule 2.01 - a lawyer shall exercise independent professional judgment and render candid advice

Rule 3.01 - a lawyer shall not assert a position unless the lawyer reasonably believes that a nonfrivolous basis exists for doing so

Rule 3.02 - a lawyer shall not take a position that unreasonably increases the costs or other burdens of the case or that unreasonably delays resolution of the matter

Rule 3.03(a) - a lawyer shall not knowingly (1) make a false statement of material fact or law to a tribunal, or (2) fail to disclose a fact to a tribunal when disclosure is necessary to avoid assisting a criminal or fraudulent act

Rule 3.04(a) - a lawyer shall not unlawfully obstruct another party's access to evidence; or in anticipation of a dispute, unlawfully alter, destroy, or conceal a document or other material that would have potential evidentiary value, or counsel someone else to do so

Rule 3.04(c):

- a lawyer shall not habitually violate an established rule of procedure or evidence
- a lawyer shall not state or allude to any matter that the lawyer does not reasonably believe is relevant, or that will not be supported by admissible evidence, or assert personal knowledge of facts in issue except when testifying as a witness
- a lawyer shall not state a personal opinion as to the justness of a cause, the credibility of a witness, the culpability of a civil litigant or the guilt/innocence of an accused
- a lawyer shall not ask any question intended to degrade a witness or other person except when the lawyer reasonably believes that the question will lead to relevant and admissible evidence
- a lawyer shall not engage in conduct intended to disrupt the proceedings

Rule 3.04(d) - a lawyer shall not knowingly disobey an obligation under the standing rules of a tribunal or a ruling by a tribunal

Rule 3.05(a) - a lawyer shall not seek to influence a tribunal concerning a pending matter by means prohibited by law or rules (e.g., ex parte communications)

Rule 3.07 - a lawyer shall not make an extrajudicial statement that a reasonable person would expect to be disseminated in the press if the lawyer knows or should know that it will have a substantial likelihood of materially prejudicing a proceeding

Rule 3.08 - generally prohibits a lawyer from acting as both a witness and counsel, with certain exceptions

Rule 4.01(a) - a lawyer shall not make a false statement of material fact or law to a third person

Rule 4.04(a) - a lawyer shall not use means that have no substantial purpose other than to embarrass, delay, or burden a third person

Rule 5.01 - a supervising lawyer is subject to discipline if he or she orders, encourages, or knowingly permits a lawyer he or she supervises to violate the rules of professional conduct, or if the supervising lawyer fails to take reasonable remedial action to avoid or mitigate the consequences of the supervised lawyer's violation

Rule 5.02 - a supervised lawyer does not violate the rules if the lawyer acts in accordance with a supervisory lawyer's "reasonable resolution of an arguable question of professional ethics"

Rule 5.03 - with respect to nonlawyer employees, a lawyer having direct supervisory authority over the nonlawyer shall make reasonable efforts to ensure that the person's conduct is compatible with the lawyer's professional obligations, and the supervisory lawyer is subject to discipline if the lawyer orders, encourages, or permits the conduct involved, or fails to take reasonable remedial action to avoid or mitigate the consequence of the person's misconduct

Rule 5.08(a) - a lawyer shall not willfully manifest bias or prejudice based on race, color, national origin, religion, disability, age, sex, or sexual orientation

Rule 8.03(a) - a lawyer having knowledge that another lawyer has committed a violation of the rules that raises a substantial question as to that lawyer's honesty, trustworthiness or fitness as a lawyer in other respects, shall inform the appropriate disciplinary authority

Rule 8.04(a) - a lawyer shall not:

- (1) violate the rules directly or indirectly, or assist or induce another to do so
- (2) commit a serious crime, or any other criminal act that reflects adversely on the lawyer's honesty, trustworthiness, or fitness
- (3) engage in dishonesty, fraud, deceit, or misrepresentation
- (4) engage in obstruction of justice
- (5) state or imply an ability to influence improperly a government official (such as a judge) or agency
- (6) knowingly assist a judge to violate judicial conduct rules or law



# Happy Anniversary!

\*MEMBERSHIP RENEWAL MONTH

## — January\* —

**Lynn Broderick** (member since 2020)  
**C. Susan Eskew, PP, PLS** (member since 2004)  
**Sharon L. Heinaman** (member since 2021)  
**Avis Morris** (member since 2020)  
**Jenna Quiroz** (member since 2023)  
**Sherida Stone, CP** (member since 2012)

## — February\* —

<b>Terry Ann Castillo</b> (member since 2013)	<b>Paola Ostos</b> (member since 2022)
<b>David A. DeFranco, PLS</b> (member since 1986)	<b>Michelle M. Padilla</b> (member since 2002)
<b>Clarissa Elias</b> (member since 2022)	<b>Gay Suzanne Polk</b> (member since 2008)
<b>Georgina Gallegos</b> (member since 2022)	<b>Mary R. Reyes</b> (member since 2014)
<b>Carol R. Gutierrez, PLS</b> (member since 1987)	<b>Rosaura R. Salinas</b> (member since 2015)
<b>Wanda Hufnagle</b> (member since 2002)	<b>Katrina M. Smith</b> (member since 2023)
<b>Giulianna Leal</b> (member since 2021)	<b>Ogden Taylor Smith</b> (member since 2023)
<b>Elizabeth L'Esperance, CP</b> (member since 2013)	<b>Jenna Stegman</b> (member since 2023)
<b>Rebecca Long</b> (member since 2023)	<b>Kris Kay Therrian</b> (member since 2023)
<b>Deborah L. McAfoose, PLS</b> (member since 1999)	<b>Sonia Valencia</b> (member since 2022)
<b>Christina Mendoza</b> (member since 2019)	<b>Elizabeth G. Wells, PP, PLS, TSC-RE</b>
<b>Celina Moss</b> (member since 2018)	(member since 1994)

## — March\* —

**Catarino Alvear** (member since 2019)  
**Cassidy Bass** (member since 2023)  
**Lisa Castaneda** (member since 2018)  
**Rebecca Farias** (member since 2023)  
**Linda H. Gill, ALP** (member since 2013)  
**Andrea D. Griffin, PP, PLS** (member since 2010)  
**Laura Jimenez** (member since 2015)  
**Anne Johnson** (member since 2021)  
**De'Naesha A. Mitchell** (member since 2021)  
**Terri-Lynne Schofield, PLS** (member since 1988)  
**Kristy R. Turner, PP, PLS, CP, TSC-CL/RE**  
(member since 1999)

### **For further membership information, contact:**

Diana (Dee) Martinez | TALP Membership Chair | [dmartinez@edwardsfirm.com](mailto:dmartinez@edwardsfirm.com)

# Happy Birthday!

## January

- 1 — Linda H. Gill, ALP
- 4 — Julie A. Abernathy, PP, PLS
- 4 — Jennifer Alonso
- 9 — Sharon L. Heinaman
- 12 — Rachel Scott
- 13 — Suzanne H. Beatty, PP, PLS
- 16 — Giuliana Leal
- 19 — Deborah L. McAfoose, PLS
- 20 — Blake Walterscheid, CLP
- 22 — Barbara L. Wojak, PP, PLS
- 23 — Monica Acuna
- 26 — AnneMarie C. Carlin
- 30 — Angela Gschwend

## February

- 3 — Cerra Rasberry
- 4 — Lesly Orozco
- 5 — Aurora (Rory) Cavazos, PLS, CLA, CPS
- 8 — Sheila Roach
- 12 — Mary Hoover Hernandez
- 12 — Laura L. Rogers, PLS
- 14 — Krystin N. Miller
- 15 — David A. DeFranco, PLS

- 15 — Sylvia Juarez
- 16 — Melissa Espinoza
- 20 — Jamie L. Perkins, PP, PLS
- 22 — Sylvia J. Griffin
- 22 — Cynthia Hernandez
- 24 — Maria Elliott
- 26 — Kathy L. Davis, PLS
- 26 — Paola Ostos
- 27 — April Mock

## March

- 1 — Terri-Lynne Schofield, PLS
- 5 — Ruth Ann Stallions, PLS
- 7 — Shelly Amason
- 7 — Anna Thomas
- 9 — Porsche Lockhart
- 11 — Ronnie Salinas
- 13 — Stephane Brooks
- 14 — Carlos Hinojosa
- 14 — Rosaura R. Salinas
- 20 — Maria Luisa Morales
- 21 — Cherilynne M. Ramsey, CLP
- 22 — Suzanne Nieto
- 25 — Wanda Hufnagle
- 30 — Corina Mercier, PP, PLS-SC



# The Bar

## Whiskey Sour

2 oz. Whiskey  
1 oz. Lemon  
¾ oz. Simple Syrup

Shake all ingredients in a shaker until cold and serve over ice.

## Classic Margarita

1 ½ oz. Tequila  
1 oz. Triple Sec or Cointreau  
¾ oz. Lime Juice

Rim the glass with salt. Shake all ingredients in a shaker, add 4 ice cubes and shake until cold. Strain into a glass and add an umbrella 😊

## Red Sangria

- 1 (750-ml.) bottle red wine
- ¾ c. fresh orange juice
- ½ c. brandy
- ¼ c. granulated sugar
- 1 orange, sliced
- 1 apple, sliced
- 1 c. fresh blueberries
- 1 c. sliced fresh strawberries
- 1 (3") cinnamon stick



Step 1 In a large pitcher, mix wine, orange juice, brandy, and granulated sugar. Stir in oranges, apples, blueberries, strawberries, and cinnamon.

Step 2 Refrigerate until ready to serve, at least 2 hours or preferably overnight.





# Texas ALP Member Spotlight Lola J. Smith-Gentry, ACP

## About Me

These days I think of myself as “Grandma” first and foremost. That’s my priority! I spend a lot of free time with my 6 grandkids (ages 15, 11, 8, 4, 3, and 3).

October was the 13<sup>th</sup> anniversary of working with a senior attorney in estate and tax planning, probate, and entities! Before that, I worked 9 months for a collection firm doing discovery and motions for continuance. My “legal career” started when hired to do transcription about 25 years ago. That led to more and more duties until I became a Legal Assistant.

I am active at St. John’s UMC in Lubbock, including Peace and Justice Committee, Bible study, and prayer shawl ministry.

Over 15 years ago, Bosses’ Night was my first taste of Lubbock LPA. One of our attorneys and one of my coworkers received awards. The rest is history! I went to one meeting and joined. Shortly thereafter, elected secretary and nothing has been the same. I was made welcome, my opinions were valued, I could make a difference in projects, etc., etc. I have learned. I have made friendships.

As I have stated before, you never know when you will use what you learn at a CLE. My network is how I learned my current position was open.

## Contact Info

Here are all the ways you can contact me:

- [lgentry@hkwwlaw.com](mailto:lgentry@hkwwlaw.com)
- (806) 632-7464
- [facebook.com/lolasmithgentry](https://www.facebook.com/lolasmithgentry)

## My favorites

Color: Anything bright!

Grandkids

Hobbies: Crocheting, reading, crafts, teaching ESL, and walking

Food: Popcorn

Drink: Coffee

# FOOTPRINTS LEFT IN THE SAND!

**Individuals  
Local Associations  
TALP  
NALS**

**(aka “It Ain’t Braggin’ If It’s True!”)**



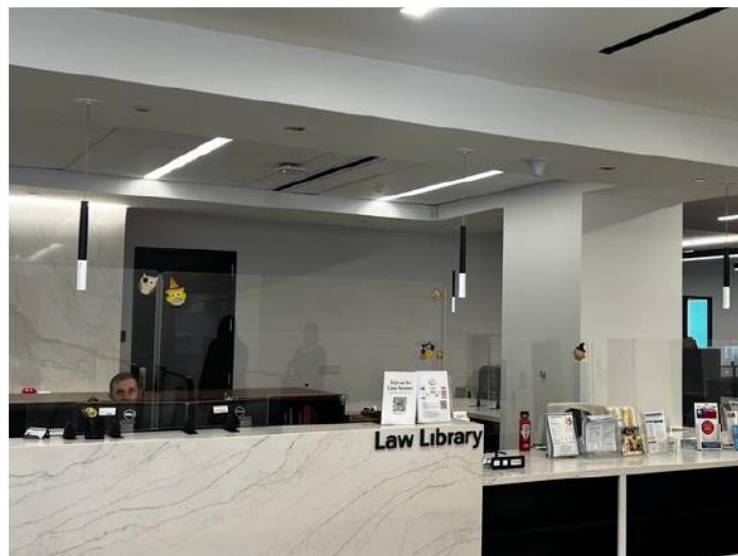
**Share your local association news!  
Just send your stories and brags to  
[lgentry@hkwwlaw.com](mailto:lgentry@hkwwlaw.com)**

## AUSTIN LPA, INC.

October was a month for Austin LPA, Inc.'s seasoned and prospective new members – they came together for a presentation and tour of the new Travis County Civil and Family Courts Facility.



Austin LPA would like to say **“THANK YOU”** to Velva L. Price, Travis County District Clerk for the insight on local rules, law library and a tour of the new facility – it was totally AWESOME!





# CCALP CELEBRATES COURT OBSERVANCE WEEK



The Corpus Christi Association of Legal Professionals celebrated Court Observance Week from Oct. 9-13, 2023, with several events scheduled during the week.

- Proclamation Reading by Mayor
- Membership Drive
- CLE on Guardianship
- Federal Courthouse Tour

**October 10, 2023:**  
Proclamation Reading by  
Mayor Paulette Guajardo



**October 11, 2023:**  
Membership Drive/Mixer  
Held at Cassidy's Irish Pub

**October 12, 2023:**  
CLE Presentation  
Topic: Guardianships  
By: Judge Timothy McCoy



**October 13, 2023**  
Federal Courthouse Tour  
United States District Court,  
Southern District of Texas

# Congratulations

**DeNaesha (“Dee”) Mitchell**

**a Corpus Christi ALP Member**



Congratulations to Dee Mitchell on her recent selection to serve as a Fifth Circuit Representative for the Board of the Federal Bar Association! *We are so proud of you!*

## LUBBOCK LPA BRAGS DAY IN COURT REPORT

On October 21, 2023 we hosted our annual Day In Court CLE. The cost to attendees was free but we suggested that they donate a bear for National Adoption Day. LLPA members donated food and drinks for the event. Matthew Harris Law, PLLC, hosted the event in its conference room. We had 20 attendees!

Our CLE topics were an hour of statutory updates by the Honorable Judge Mark Hocker, and then a round table discussion on mental health and the legal system, with the Honorable Judge Curtis Parris, Dane Norman, and Marlise Boyles. The statutory update covered the new and current legislation from this past session, from civil to criminal and family. The roundtable discussed mental health and how our Courts handle those who are in need and where we stand not only in Lubbock County but in the State for being able to assist.

We had over a dozen bears donated and Blake and Emily took those and delivered them to the Lubbock County District Clerk's office to be used for Adoption Day in November 2023.

Panel of Speakers





**Combined Holiday Social with West Texas Paralegal Association.**

**We enjoyed a meal together and gathered gift cards, toiletries, and other items for CASA. Thanks Simek Denistry from Lubbock for donating over 300 toothbrushes and toothpaste!**



## **Note from the Editor:**

Have you read an article you think other members might be interested in reading?  
If so, you can share it for others to read in *The Texas Docket*.

Feel free to e-mail the article to me at [lgentry@hkwwlaw.com](mailto:lgentry@hkwwlaw.com)

**Local Associations,  
please send your brags!**





**TEXAS ALP 69<sup>TH</sup> ANNUAL  
EDUCATION  
CONFERENCE**  
*“Dazzled Determination”*  
**Waco, Texas, April 5-6, 2024**

TEXAS ALP 69<sup>TH</sup> ANNUAL EDUCATION CONFERENCE

Waco, Texas \* April 5-6, 2024

"Dazzled Determination"

REGISTRATION DEADLINE—MARCH 20, 2024

REGISTRATION FORM

Name
Address
City/ST/ZIP
Daytime Phone
Mobile Phone
E-mail

Certifications

- ALP, CLA/CP, RP, PLS/CLP, ACP, SC, PP, TSC, Other

Local Chapter
Current Texas ALP Position Held
Current Local Position Held
Current NALS Position Held

- NALS Life Member, Texas ALP Past President, This is my first Texas ALP meeting, I want to be a Texas ALP PAL, Special dietary request

FULL REGISTRATION FEES

- NALS Member\* \$150, Texas ALP Chair \$100, Nonmember \$175, Student \$100

\*Per Standing Rule No. 22, members are required to pay the full registration fee.

INDIVIDUAL EVENT REGISTRATION FEES

- Education Only - Nonmember (no meals) \$100, Education Only - Student (no meals) \$75, Recognition Luncheon - Student/Nonmember \$25, Professional Development Luncheon-Student/Nonmember \$25, Presidents' Banquet (Saturday) \$50

MEMBER'S GUEST REGISTRATION

- Recognition Luncheon \$25, Professional Development Luncheon \$25, Presidents' Banquet (Saturday) \$50

GUEST NAME:

SCHEDULE OF EVENTS (Please mark each event you will attend)

Friday, April 5, 2024

- 9:00 am - 10:00 am Ethics (1.0 CLE), 10:15 am - 11:15 am Long-Term Care Planning (1.0 CLE), 11:30 am - 1:00 pm Professional Development Luncheon, 1:15 pm - 1:45 pm President-elect's Forum, 1:45 pm - 2:15 pm Open Forum, 2:30 pm - 3:30 pm Texas Rangers-Past and Present (1.0 CLE), 4:00 pm - 4:15 pm Credential Check-in, 4:15 pm - 6:00 pm Texas ALP Annual Board Meeting

Saturday, April 6, 2023

- 9:00 am - 10:00 am Patent Court & Procedures (1.0 CLE), 10:15 am - 11:15 am Storytelling of Jury Trials (1.0 CLE), 11:30 am - 12:30 pm Recognition Luncheon, 12:30 pm - 1:00 pm Appreciation of 2023-2024 TALP President, 1:00 pm - 2:00 pm PI w/ Non-Visible Injuries (1.0 CLE), 2:30 pm - 3:30 pm Special Needs Trust & ABLE Accts., 5:30 pm - 6:00 pm President's Reception, 6:00 pm - 8:00 pm Presidents' Banquet

PAYMENT INFORMATION

Total Amount Due: \$

Please make check payable to:

Waco LPA Special Meeting Account (Federal Tax ID No. 74-)

Notices: (1) A \$30 fee will be assessed for returned checks. (2) Refunds requested and confirmed in writing (less a \$25 processing fee) will be made until April 1, 2024.

Conference Chairs:

Emily Folsom 254.297.7300 • emf@pakislaw.com, Donna K. Dendy, PP, CLP 254.716.2632 • dkd@pakislaw.com

Mail registration form and payment to:

Mary Bullard, ACP Registration Chair 5 Lake Stone Court Woodway, Texas 76712 254.214.1128 • marybtalp@gmail.com

Hotel Reservations should be made directly with Holiday Inn Express & Suites Waco South, 5701 Legends Lake Parkway, Waco, TX 76712 (254.732.1028). To receive the discounted room rate of \$169 double/king (plus 17% tax). Quoted room rates are available until March 22, 2024.

**TEXAS ALP 69<sup>TH</sup> ANNUAL EDUCATION CONFERENCE**  
**“Dazzled Determination”**  
**Waco, Texas, April 5-6, 2024**

**SCHEDULE OF EVENTS**

**Friday, April 5, 2024**

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8:30 am – 10:00 am	Registration
8:30 am – 4:00 pm	Vendors
9:00 am – 10:00 am	Ethics – Pete Rusek, Esq., Sheehy, Lovelace & Mayfield (1.0 CLE)
10:00 am – 10:15 am	Break
10:15 am – 11:15 am	Long-Term Care Planning – Garrett Beach, Esq., The Zimmerman Law Firm (1.0 CLE)
11:30 am – 1:00 pm	Professional Development Luncheon – TBD (1.0 PD)
1:15 pm – 1:45 pm	President-elect’s Forum (plus meeting of 2024-2025 Chairs)
1:45 pm – 2:15 pm	<i>Open Forum</i>
2:15 pm – 2:30 pm	Break
2:30 pm – 3:30 pm	Texas Rangers – Past and Present – Travis Dendy, Texas Ranger, Company B (1.0 CLE)
4:00 pm – 4:15 pm	Credentials Check-in
4:15 pm – 6:00 pm	Texas ALP Annual Board Meeting

**Saturday, April 6, 2024**

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9:00 am – 10:00 am	Registration
8:30 am – 4:00 pm	Vendors
9:00 am – 10:00 am	Patent Court and Procedures – David N. Deaconson, Esq., Pakis, Giotes, Burleson & Deaconson, P.C. (1.0)
10:00 am – 10:15 am	Break
10:15 am – 11:15 am	Storytelling of Jury Trials – Elizabeth Fraley, Esq., Professor, Baylor Law School (1.0 CLE)
11:30 am – 12:30 pm	Recognition Luncheon
12:30 pm – 1:00 pm	Appreciation of 2023-2024 TALP President
1:00 pm – 2:00 pm	Personal Injury with Non-Visible Injuries – Jim Hering, Esq., Pakis, Giotes, Burleson & Deaconson, P.C. (1.0 CLE)
2:00 pm – 2:30 pm	Break
2:30 pm – 3:30 pm	Special Needs Trust and ABLE Accounts – Carlie C. Gause, Esq., Pakis, Giotes, Burleson & Deaconson, P.C. (1.0 CLE)
3:30 pm – 4:00 pm	TALP Fundraising Raffle
5:30 pm – 6:00 pm	President’s Reception
6:00 pm – 8:00 pm	Presidents’ Banquet

# The Texas Docket

## Advertising Rates

*The Texas Docket* is the official publication of the Texas Association of Legal Professionals and is published quarterly each year as a service to the legal profession. Publication dates are July 1, October 1, January 1, and April 1, with submission deadlines being May 1, August 1, November 1, and February 1. *The Texas Docket* is distributed electronically to its statewide network of members, subscribers, and others. Vendors who work in the legal field are welcome and encouraged to advertise in *The Texas Docket*.

<u>Ad Options</u>	<u>Ad Rates</u>	
Full page (9" h x 7" w)	<u>Annual</u>	<u>One Issue</u>
Half Page Horizontal (4.5" h x 7" w)	Full = \$100	Full = \$50
Quarter Page Vertical (4.5" h x 3.25" w)	Half = \$75	Half = \$35
	Quarter = \$50	Quarter = \$20

## ADVERTISING ORDER FORM

_____ Company Name	_____ Ad Selection	
_____ Billing Address	_____ Signature	_____ Date
_____ Phone	_____ Printed Name	

**Send order form, camera-ready advertisement, and payment to:**

Lola Smith-Gentry, ACP  
PO Box 94074  
Lubbock, Texas 79493

*Your advertisement can be e-mailed in a graphic format to [lgentry@hkwwlaw.com](mailto:lgentry@hkwwlaw.com).*

**For more information, contact:**

Lola Smith-Gentry, ACP  
806.632.7464 • [lgentry@hkwwlaw.com](mailto:lgentry@hkwwlaw.com)

# TEXAS ALP **2023-2024** ROSTER OF OFFICERS AND CHAIRS

Chartered July 27, 1956



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## Executive Committee

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<b>PRESIDENT</b>	Michelle McDaniel (Corpus Christi ALP)
<b>PRESIDENT-ELECT</b>	Laura DeLeon (Waco LPA)
<b>TREASURER</b>	Theresa Ann Alba, PLS (Austin LPA)
<b>SECRETARY</b>	Jerri Locknane, CLP (Lubbock LPA)
<b>PARLIAMENTARIAN</b>	Andrea D. Griffin, PP, PLS (Member at Large)

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## Standing Committees

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<b>ANNUAL CONFERENCE (Cochairs)</b>	Donna K. Dendy, PP, CLP, TSC-RE (Waco LPA) Emily Folsom (Waco LPA)
<b>AWARDS</b>	Sharon Heinaman (Corpus Christi ALP)
<b>BYLAWS/STANDING RULES</b>	Patricia M. Nuhn, PLS (Austin LPA)
<b>CERTIFICATION</b>	Carol R. Gutierrez, PLS (El Paso ALP)
<b>COMMUNICATIONS</b>	Helene L. Wood, PP, PLS, TSC-RE (Houston ALP)
<b>EDUCATION</b>	Marty S. Olson, PP, PLS, TSC-RE (Houston ALP)
<b>FALL EDUCATION CONFERENCE</b>	Cheryl A. Wenzel, PP, PLS (San Antonio LSA)
<b>FINANCIAL REVIEW</b>	Aurora (Rory) Cavazos, PLS, CLA, CPS (San Antonio LSA)
<b>FUNDRAISING</b>	Sylvia Juarez (Lubbock LPA)
<b>MARKETING</b>	Rachel Scott (El Paso ALP)
<b>MEETINGS COORDINATOR</b>	Donna K. Dendy, PP, CLP, TSC-RE (Waco LPA)
<b>MEMBERSHIP</b>	Diana (Dee) Martinez (Corpus Christi ALP)
<b>NOMINATIONS &amp; ELECTIONS</b>	Emily Folsom (Waco LPA)
<b>PLANNING</b>	Faynell Poe, PP, PLS (El Paso ALP)
<b>PROFESSIONAL DEVELOPMENT</b>	Laura L. Powers, CP (Dallas ALP)
<b>THE TEXAS DOCKET</b>	Lola J. Smith-Gentry, ACP (Lubbock LPA)
<b>WEBMASTER</b>	Rachel Scott (El Paso ALP)

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## Special Committee

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<b>TALP HUGS</b>	Tina D. Hurley, PP, CLP (Dallas ALP)
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