# The Junction

Volume 2 • Issue 4

April 2014

# Love, Dream, Believe

Finally, Spring has sprung! So glad that this winter is over. I am most certainly not a snow/cold weather person!! Now, I am anxiously awaiting the arrival of the spring flowers, green grass, long days and the songs of baby birds.

March exams have been completed. I wish all of the exam takers the best of luck with their results. I applaud you for taking the giant step forward and working towards achieving which ever certification you have chosen, ALP, PLS, or PP. You should be very proud of yourself, regardless of the exam outcome. have been working towards bettering yourself for your career and that is already a winning situation for you and your employer. For TALS members in good standing, if you have passed a certification exam in September 2013 or March 2014, please submit a check request to me reimbursement of your exam fee.

For those of you that attended the NALS Leadership Conference in Tulsa in February/March, I hope you had a wonderful time. Be sure

to share your experience with your local chapter members. I have been hearing the buzz about an "app" being



introduced in the near future.

Congratulations Tina Boone for being installed as a NALS Board Member! and every TALS member should be beaming with pride over the fact that one of our Tennessee girls is on the leadership team this year. Please join me in giving Tina and our newly installed NALS officers your support and encouragement as they move NALS forward in a new and exciting direction.

Our annual meeting will be in Nashville on May 17th Please make your reservations early so the Nashville Chapter will have plenty of time to

prepare for all attendees. Those of you seeking to be elected to the EC this year should make plans to be at the President's Reception on Friday evening. Come prepared to greet your fellow TALS members and let them know why you believe you are the best candidate for the position. Saturday's activities will include a miniseminar in the morning followed by our annual meeting and elections. The installation and banquet aboard the General Jackson will be in the evening. Pack your party boots because it sounds like we are all in for a wonderful evening.

NALS Annual Education Conference and National Forum which was held in Houston, Texas this year. We had 16 ladies from Tennessee present in Atlanta last year. Let's see if we can outdo that number in Houston. What great a opportunity not only to network and obtain CLEs, but also to let loose and have a little fun with members from across the nation.

Let me again encourage you, if you are an inactive member of TALS, become active again. Reignite the love for your profession that brought you to TALS in the first place.

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# **Statements & History**

Reconnect with your friends. If you are active in TALS, reach out to one of those inactive members or to a new person and share your dream, invite them to join us on our journey. I continue to challenge you to "love, dream, serving on the EC with her. believe" - love your profession, dream of how you may grow in it, and believe that you make a difference. Also, please remember that if you recruit 5 members in one year, NALS will waive your membership renewal fees when they become due.

I would like to thank each and Your sister in law, every one of you for making my year as president one that I will not forget for a very long time. I have truly enjoyed my year at the helm of such a wonderful and supportive group of ladies.

## **Vision Statement**

TALS - Legal Professionals of Tennessee is one part of a trilevel association committed to the ideas of furthering the informative educational. and professional ideals of legal professionals including paralegals, secretaries and support staff. TALS' main vision is to be an important part of the legal community in order to advance the legal profession. To accomplish this goal:

pray that each and every one of you has a very happy and prosperous year and that your dreams do come true. I know that Mary Pewitt will be a wonderful leader this coming and look forward to Give her your support and continue to shower her with our southern hospitality as she leads us into the next year.

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**Best Wishes!** 

Theresa Estopare, PP, PLS, SC-Litigation/Civil Law

TALS will offer educational information seminars and training to its members and to others who are interested in growing knowledge and advancing careers.

TALS will offer certifications (ALP, PLS and PP) to help its members and others who are interested in studying accomplish these goals.

TALS will network with chapters in other cities and the legal community. states to assist others with

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accomplish their work.

TALS will be committed to the Code of Ethics and high professional standards make the legal profession honorable.

TALS will be active on the local, state and national levels to the best of its ability to make the organization well known and proud to be part of

# **Statements & History**

## **Mission Statement**

TALS -- Legal Professionals of Tennessee is dedicated to:

• Carrying on a program for the furtherance of education to those engaged in legal work and to cooperate with attorneys, judges, and bar associations in stimulating a high order of professional standards and ethics among those persons engaged as support staff in private law offices,

trust companies, various courts, and municipal and governmental agencies.

- Promote the objectives of the National Association; and
- Organize chapters of Legal Professionals Associations throughout the state.

## **TALS History**

TALS-Legal Professionals of Tennessee became a formal reality in 1961 with the chartering of the three chapters: Chattanooga, Knoxville, and Memphis. Nashville LSA had been meeting for many years prior to that date, but did not formally join TALS until 1972. Our TALS family now has four chapters: Chattanooga, Memphis, Nashville, and Mid-Tennessee.

## **NALS Mission Statement**

Members of NALS... the association for legal professionals

are bound by the objectives of this Association and the

standards of conduct required • of the legal profession.

Every member shall:

 Encourage respect for the law and the administration of justice;

- Observe rules governing privileged communications and confidential information;
- Promote and exemplify high standards of loyalty, cooperation, and courtesy;
- Perform all duties of the profession with integrity and competence; and

Pursue a high order of professional attainment.

# Birthdays

	Chapter	Date
April		
Kimberly Nixon	Chattanooga	April 9
Cathy Barton	Nashville	April 9
Lita Ferrell, PLS	Member At Large	April 16
Theresa Estopare, PP, PLS	Memphis	April 21
Brittany Ross	Nashville	April 21
Amelia Workman, PLS	Nashville	April 22
Tina Boone, PLS	Nashville	April 23
May		
Linda Hulsey	Nashville	May 10
Delone Anderson, PLS	Nashville	May 12
Carrie Bailey	Nashville	May 19
Carol Nelson, PP	Nashville	May 28
June		
Regina Graham, PLS	Memphis	June 3
Tara Brown	Memphis	June 13
Nina Smith	Nashville	June 13
Ginny Hogan	Chattanooga	June 20
Deborah Rubenstein, PLS	Nashville	June 21
Gail Williams, PLS	Memphis	June 27
Janet Daniel, PLS, CPS	Chattanooga	June 30
July		
Tina Riegert, PLS	Memphis	July 5
Rebecca Dunaway	Nashville	July 11
Cynthia Gregory, PP, PLS	Memphis	July 23
Lisa Davis, CP	Nashville	July 24
Sandra Sinclair	NCSS	July 25
Mary Vickers, PP, PLS	Memphis	July 25
Josephine Savage	NSCC	July 31



# 2013 – 2014 Officers

President	Theresa Estopare, PP, PLS, SC Baker, Donelson, Bearman, Caldwell & Berkowitz, P.C. 165 Madison Avenue, Suite 2000 Memphis, Tennessee 38103	Tel: (901) 577-8283 testopare@bakerdonelson.com
President-elect	Mary Pewitt Young, McDade & Hassell 227 Bridge Street Franklin, Tennessee 37064	Tel: (615) 791-0058 mpewitt@ymhlawgroup.com
Vice President	Donna Jenkins, PP, PLS, CLS Baker, Donelson, Bearman, Caldwell & Berkowitz, P.C. 165 Madison Avenue, Suite 2000 Memphis, Tennessee 38103	Tel: (901) 577-2240 djenkins@bakerdonelson.com
Secretary	Gloria Thomas, PP, PLS, CP P.O. Box 831 Wynne, Arkansas 72396	Tel: (870) 238-2317 gjthomas@sbcglobal.net
Treasurer	Cynthia Gregory, PP, PLS Baker, Donelson, Bearman, Caldwell & Berkowitz, P.C. 165 Madison Avenue, Suite 2000 Memphis, Tennessee 38103	Tel: (901) 577-2289 cgregory@bakerdonelson.com
Parliamentarian	Delone Anderson, PLS 1084 Beech Tree Lane Brentwood, Tennessee 37027	Tel: (615) 973-6385 delone011@bellsouth.net
Functional Governor – Marketing	Deborrah Pugh, PLS Baker, Donelson, Bearman, Caldwell & Berkowitz, P.C. 165 Madison Avenue, Suite 2000 Memphis, Tennessee 38103	Tel: (901) 577-2165 dpugh@bakerdonelson.com
Functional Governor – Strategic Planning	Donice Alford, PP, PLS Howard, Tate, Sowell, Wilson, Leathers & Johnson 150 2nd Avenue North, Suite 201 Nashville, Tennessee 37201	Tel: (615) 256-1125 deapls@yahoo.com
Past President	Vickie Hellmer, PLS Lewis, Thomason, King, Krieg & Waldrop, P.C. 424 Church Street, Suite 2500 Nashville, Tennessee 37219	Tel: (615) 259-1354 vhellmer@lewisthomason.com

## 2013 – 2014 Committee Chairpersons

## **Annual Meeting**

Nashville Chapter

## **Audit**

**TBA** 

## Benevolence

Lita Ferrell, PLS Woolf, McClane, Bright, Allen & Carpenter 900 S. Gay Street, 9th Floor Knoxville, Tennessee 37901

## **Budget / Finance**

Cynthia Gregory, PP, PLS Baker, Donelson, Bearman, Caldwell & Berkowitz, P.C. 165 Madison Avenue, Suite 2000 Memphis, Tennessee 38103

## **Bylaws**

Delone Anderson, PLS 1084 Beech Tree Lane Brentwood, Tennessee 37027

## Certification

Mary Vickers, PP, PLS, SC-Litigation / Civil Law Bass Berry & Sims, PLC 100 Peabody Place, Suite 900 Memphis, Tennessee 38103

## **CLE**

Mary Pewitt Young, McDade & Hassell 227 Bridge Street Franklin, Tennessee 37064

## **History Book**

## **Membership Directory**

Gloria Thomas, PP, PLS, CP P.O. Box 831 Wynne, Arkansas 72396

## **Nominations & Elections**

Evia Betts P.O. Box 8102 Chattanooga, Tennessee 37414

## **TALS Scholarship**

Sharon Wilcox Bone McAllester Norton, PLLC 511 Union Street, Suite 1600 Nashville, TN 37219

## The Junction

Tiffany Burford Taylor Waller Lansden Dortch & Davis, LLP 511 Union Street, Suite 2700 Nashville, Tennessee 37219

## Ways & Means

Gail Powell-Williams, PLS 6802 Pecanhill Drive Bartlett, Tennessee 38135

#### Website

Tiffany Burford Taylor Waller Lansden Dortch & Davis, LLP 511 Union Street, Suite 2700 Nashville, Tennessee 37219



## Chapter Leadership

Chattanooga	Kim Chapman McMahan Law Firm P.O. Box 11107 Chattanooga, Tennessee 37450	Tel: (423) 265-1100 kimchap- man@mcmahanlawfirm.com
Memphis	Cynthia Gregory, PP, PLS Baker, Donelson, Bearman, Caldwell & Berkowitz, P.C. 165 Madison Avenue, Suite 2000 Memphis, Tennessee 38103	Tel: (901) 577-2289 cgregory@bakerdonelson.com
Mid-Tennessee	Linda Davenport 2322 Crown Hill Drive Murfreesboro, Tennessee 37129	Tel: (615) 890-0393 linda.a.davenport@att.net
Nashville	Tiffany Burford Taylor Waller Lansden Dortch & Davis, LLP 511 Union Street, Suite 2700 Nashville, Tennessee 37219	Tel: (615) 850-8883 tiffany.taylor@wallerlaw.com
Nashville State	Ed Turnley, Coordinator Nashville State Community College 120 White Bridge Road Nashville, Tennessee 37209	Tel: (615) edmund.turnley@nscc.edu

# **Certified Excellence**

At LargeGloria J. Thomas, PP, PLS, CPLita Ferrell, PLSMary S. Vickers, PP, PLS, SC-M. P. Wilson, PLSLitigation/Civil Law

Chattanooga

Janet G. Daniel, PLS, CPS Nashville Donice Alford, PP, PLS Memphis Delone Anderson, PLS Christal Cater, ALP Tina L. Boone, PLS Theresa D. Estopare, PP, PLS, SC-Melanie Collins, PLS Litigation/Civil Law Dolores K. Foster, PLS Regina D. Graham, PLS Chris Galyon, PLS Cynthia Gregory, PP, PLS Vickie Hellmer, PLS Theresa Harris, PLS Elise Hill, ALP Melanie Howell, ALP Katrina Hunley, ALP Donna Jenkins, PP, PLS, CLS Theresa Marchese, PLS Vicky LaPradd, PP, PLS Carol Nelson, PP Gail Powell-Williams, PLS Deborah Rubenstein, PLS Deborah Pugh, PLS Amelia Workman, PLS

# Ways & Means



TALS Ways and Means will have T-shirts for \$20 and Umbrellas for \$12 with the TALS monogram on each item at the Annual Meeting on May 17, 2014 . Please bring your money and help raise funds for TALS.

## Announcements

#### TALS 2013 - 2014 Schedule

<u>Date</u> 08/3/13	<u>Purpose</u> Summer Meeting	<u>Location</u> Mid-Tenn
10/17-20/13	Fall Meeting	Atlanta, GA*
10/17-20/13	62nd Annual Education Conference & National Forum	Atlanta, GA
2/8/14	Winter Meeting	Memphis
02/27-3/2/14	Professional Development & Education Conference	Tulsa, OK
5/17/14	Annual Meeting	Nashville

<sup>\*</sup> Fall Meeting will be held during 62nd Annual Education Conference & National Forum

## **NALS Education Conference**

The NALS Education Conference and National Forum will be held on October 2—4 2014, in Houston, Texas! For more information, please visit http://www.nals.org/?page\_id=97. Early Bird registration ends July 1, 2014. The deadline to book your hotel room is on September 16, 2014.



## **NALS Call for Authors**

Would you be interested in submitting an article for publication in the NALS docket?

Any timely topic would be considered, including articles regarding professional development, work/life balance, social media, technology blurbs, chapter "bright spots," etc. Articles should be 1,000 words or less and submitted in Word format.

If you are interested, please contact me at theresa.marchese@wallerlaw.com so that we can discuss the deadlines.

Theresa Marchese, PLS Chair, NALS Editorial Board 2014-2015

## Announcements...cont.



# Calling All TALS Members!

Have you been dreaming about getting your PLS and/or PP Certification(s) but funds have been holding you back?

Let TALS help you!! If you are a member in good standing, and pass the PLS and/or PP exam given in September 2013 or March 2014, TALS will reimburse you the \$150 exam fee.

If you have any questions, please do not hesitate to contact a member of the EC.

We are so excited to be offering this assistance to our members!



# **Notice of Meeting**

## TALS - LEGAL PROFESSIONALS OF TENNESSEE

Gloria J. Thomas, PP, PLS, CP TALS Recording Secretary P.O. Box 831 Wynne, AR 72396

870-238-2317 (Office) 870-238-8310 (Fax) 870-588-5952 (Cell) gjthomas@sbcglobal.net

**TO**: Chapter Governors, for distribution to all TALS Members

TALS Executive Committee

**FROM**: Gloria J. Thomas, PP, PLS, CP, TALS Recording Secretary

**DATE**: April 1, 2014

**RE**: Notice of TALS Annual Meeting

In accordance with Article V, Section 1 of the Bylaws of TALS - Legal Professionals of Tennessee, notice is hereby given of the Annual Meeting to be held on Saturday, May 17, 2014, beginning at 8:30 a.m., at the offices of Waller Lansden Dortch & Davis, LLP, in Nashville, Tennessee.

## CLE HOST

Waller Lansden Dortch & Davis, LLP 511 Union Street, Suite 2700 Nashville, TN 37219

## **HOST HOTEL**

DoubleTree Hotel 315 4<sup>th</sup> Avenue North Nashville, TN 37219

Each Governor should prepare a report to be included in The Junction and bring sufficient copies of any/all updates to the meeting for distribution to the membership.

GOVERNORS, PLEASE FORWARD THIS NOTICE TO ALL MEMBERS OF YOUR LOCAL CHAPTER

# **Notice of Meeting...**

# DEDICATED TO ENHANCING THE COMPETENCIES AND CONTRIBUTIONS OF MEMBERS IN THE LEGAL SERVICES PROFESSION

#### TALS – Legal Professionals of Tennessee Annual Meeting May 17, 2014

#### **Host Hotel**

DoubleTree Hotel 315 4th Avenue North, Nashville, Tennessee, 37219

#### CLE Host

Waller Lansden Dortch & Davis, LLP 511 Union Street; Suite 2700 Nashville, Tennessee 37219

**Basket Theme: Sounds of Music** 

#### **Registration Form**

Name:					_01
Address: City, State, Zip					
Telephone	P	Chapter:			_
Please check the appropr	riate boxes:				
TALS Officer		First Time	Attendee		
Governor		CLA			
PLS		ALP			
CPS		Other			
PP					
Mini-Seminar:	TALS Member		\$25.00	\$	
	Non-Member / Attorney (The seminar has been approved	for CLE)	\$50.00	\$	
TALS Meeting Registrat (Seminar and meeting fe	member attendees)	\$10.00	\$		
Installation Dinner & Cr	uise		\$50.00	\$	
			TOTAL	\$	

#### PLEASE MAKE CHECKS PAYABLE TO TALS AND RETURN REGISTRATION FORM AND CHECK TO

Sharon Wilcox c/o Bone McAllester Norton, PLLC 511 Union Street, Suite 1600 Nashville, TN 37219

#### Meeting registration deadline is April 25, 2014

The rate at the DoubleTree Hotel Downtown Nashville \$169.00 per night for rooms with two Queen beds plus taxes. TALS will contribute \$50 to each room occupied by a member in good standing. Reservations can be made online or by calling the hotel at 615-747-4806. Refer to "TALS Legal Professionals." Hotel registration cutoff date is April 25, 2014. Rooms will be released after this date.

#### Directions to DoubleTree Hotel Downtown:

From Chattanooga: Take I-24 west toward Nashville. Pick up I-40 west to Nashville. Take the Church St./Charlotte Ave. Exit. Go to the 3rd light and turn right. Continue on Charlotte until you reach 4th Ave. And then turn right.

From Knoxville: Take I-40 West toward Memphis. Exit at Church St/Charlotte Ave Exit. Turn right onto Charlotte Avenue. Continue on Charlotte to 4th Avenue. Turn right and go one block. The hotel will be on the right.

From Memphis: Take I-40 east to Nashville. Exit at the Charlotte Ave/Downtown exit. Take a left at the light, continue on Charlotte until you reach 4th Ave. and then turn right. The Doubletree is one block up on your right at 4th and Deaderick.

# **Notice of Meeting...**



TALS - Legal Professionals of Tennessee

Waller Lansden Dortch & Davis, LLP Nashville, Tennessee

## MINI-SEMINAR AND STATE MEETING

8:00 – 8:30 a.m. Registration

8:30 – 10:00 a.m. "Compliance Update: The 2013 Amendments to Delaware's

**Business Entity Laws**"

Speaker: Alan Stachura of CT Corporation

10:00 – 10:15 a.m. Break

10:15 – 11:45 a.m. "Ethical Dilemmas"

Speaker: Matt Sweeney of Baker Donelson

11:45 – 1:15 p.m. Lunch

1:15 p.m. until Annual Meeting and Elections

**LUNCH PROVIDED BY** 



## TALS – LEGAL PROFESSIONALS OF TENNESSEE MINUTES OF WINTER MEETING

## February 8, 2014

## Best Western Galleria Inn & Suites Memphis, Tennessee

The Winter Meeting of TALS – Legal Professionals of Tennessee, was held on Saturday, February 8, 2014, in Memphis, Tennessee.

President Theresa Estopare, PP, PLS, called the meeting to order with the following officers present:

Name	Officer
Theresa Estopare, PP, PLS	President
Mary Pewitt	President-Elect
Donna Jenkins, PP, PLS	Vice President
Gloria J. Thomas, PP, PLS, CP	Recording Secretary
Cynthia Gregory, PP, PLS	Treasurer
Deborrah Pugh, PLS	Functional Director/Marketing

The sign-in sheet, showing a total attendance of 14, will serve as roll call.

The following Past Presidents attending were recognized: Gloria J. Thomas, PP, PLS, CP; Gail Williams, PLS; and Linda Davenport.

Minutes of the 2013 Fall Meeting were approved as printed in the *Junction*.

The Treasurer's Report was submitted subject to financial review.

Evia Betts, Nominations and Elections Chair, reported that the Call for Nominations was sent out, and nominees have been notified. The deadline is February 28 for nominees to respond either accepting or declining nomination.

Scholarship Chair Sharon Wilcox stated that she will be sending out letters to schools in hopes of securing applicants for our scholarship.

Gail Williams announced that Ways & Means ordered twelve t-shirts and nine have been sold at \$20.00 each. Half of the umbrellas have been sold at \$12.00 each. So far, \$205.00 was spent for items, and \$245.00 in income has been received. The committee will have more shirts and the umbrellas at the annual meeting in Nashville in May. Gail reported that we had \$215.00 in ticket sales for the baskets at this meeting.

TALS Winter Meeting Minutes

Page 2

Tiffany Taylor reported that the annual meeting will be May 17, 2014 in Nashville. Accommodations will be at the Doubletree Downtown. Room rate is \$169.00 per night. CLE sessions, lunch, and the business meeting will take place at the offices of Waller Lansden Dortch & Davis, LLP. The Saturday night banquet and officer installation will be a dinner cruise aboard the General Jackson Showboat. Cost is \$50.00. To help with costs, TALS will pay \$50.00 per hotel room per night for each room occupied by at least one member in good standing.

There will be no study session at the annual meeting in Nashville.

#### Announcements:

The NALS Leadership Conference will be February 27 - March 2 in Tulsa.

Sharon Wilcox will be sitting for the PP exam in March.

Delone Anderson is at home following her fall and hospitalization, but is still not weight-bearing. TALS is sending a green plant to her home.

NALS 63<sup>rd</sup> Annual Education Conference and National Forum will be held October 2-4, 2014, in Houston, Texas.

NALS 64<sup>th</sup> Annual Education Conference and National Forum will be held in Las Vegas, Nevada, in October 2015.

The Junction deadline is April 10.

The President thanked the Memphis chapter for hosting a good meeting and providing great speakers.

There being no further business, the meeting was adjourned.

Gloria J. Thomas, PP, PLS, CP TALS 2013-2014 Recording Secretary

## **Call for Nominations**

#### TALS - LEGAL PROFESSIONALS OF TENNESSEE

## SAMPLE BALLOT ELECTION OF OFFICERS 2014-2015

To be elected on May 17, 2014

OFFICE

NOMINEE

**President-Elect:** 

Donice Alford, PP, PLS, Nashville

Donna Jenkins, PP, PLS, CLS, Memphis

Vice President:

Recording Secretary:

Vickie Hellmer, PLS, Nashville

Sharon Wilcox, Nashville

Treasurer:

Gloria Thomas, PP, PLS, Memphis

**Functional Governor Marketing:** 

Theresa Estopare, PP, PLS, SC, Memphis

Tiffany Burford Taylor, Nashville

**Functional Governor Strategic Planning:** 

Gail Powell Williams, PLS, Memphis

Below is a list of the members nominated for officers of TALS - Legal Professionals of Tennessee for 2014-2015 and their responses:

President-Elect:

Donice Alford, PP, PLS, accepted; Linda Hulsey, declined; Donna Jenkins, PP, PLS,

CLS, accepted; Sharon Wilcox, ineligible

Vice President:

Donice Alford, PP, PLS, declined; Theresa Harris, PP, PLS, declined; Donna Jenkins, PP, PLS, CLS, declined; Gloria Thomas, PP, PLS, CP, declined; Mary Vickers, PP, PLS,

declined

Recording Secretary:

Donice Alford, PP, PLS, declined; Evia Betts, declined; Vickie Hellmer, PLS, accepted; Tiffany Taylor, declined; Mary Vickers, PP, PLS, declined; Sharon Wilcox, accepted

Treasurer:

Cynthia Gregory, PP, PLS, declined; Gloria Thomas, PP, PLS, CP, accepted

Functional Governor

Theresa Estopare, PP, PLS, SC, accepted; Deborrah Pugh, PLS, declined; Tiffany Taylor;

accepted; Gail Powell Williams, PLS, declined

Functional Governor

Cynthia Gregory, PP, PLS, declined; Tiffany Taylor, declined; Sharon Wilcox, declined;

Gail Powell Williams, PLS, accepted

**IMPORTANT REMINDER:** As you can see above, we have uncontested races and one vacant office with no one accepting. If you desire to nominate someone from the floor, you need to remember that you must ask the person before the meeting, ask the Nominations Chair to make sure that the person is in good standing and meets eligibility requirements, and let the President (Theresa) know before the start of the meeting that you will be nominating someone from the floor. Otherwise, your nomination cannot be accepted.

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# **Voting Rules**

You cannot vote by proxy. In order to vote in the election, you must be present at the Annual Meeting. We look forward to a good representation of our TALS membership at the meeting in Nashville.

Attached is a page entitled "Duties of Elected Officers" which you should review before the meeting so you will know what is expected of our officers.

Also, attached are the Voting Rules. Please also review before the meeting.

# Voting Rules For Regular Membership And Annual Meetings of TALS – Legal Professionals of Tennessee

In order to simplify the procedure of recording the minutes and the proper and efficient conduct of this meeting, the following rules should be followed. These rules are in compliance with our bylaws, standing rules, and Robert's Rules of Order, Newly Revised (hereafter RRONR), our parliamentary authority.

- VOTING MEMBERS & QUORUM: The voting members of this meeting are all members in good standing in attendance. The number of members present and voting constitute a quorum. Any business transacted shall be valid providing it is approved by a majority of those present and voting, with the exception of bylaw amendments, which require a 2/3 vote of those present and voting.
- RECOGNITION BY THE PRESIDENT: When a member desires to address the assembly or enter into debate, please rise and be recognized by the president before speaking. Members should only address the president, or address each other through the president, by first stating, "Madam President." (RRONR, Section 3)
- MOTIONS: All members have the privilege of the floor, and any member may make a motion, second a
  motion, and enter into discussion. Motions should be presented in writing to the president. The maker of
  the motion has the first privilege of the floor to speak in favor of the motion.
- DEBATE: The president will request a second and will then restate the motion, which places it before the
  assembly. You will then be asked if you are ready for the question, thereby opening the floor for debate.
- LIMITATIONS ON SPEAKERS: No speaker shall be permitted to speak more than twice on any one subject and not more than three minutes each time, except on order or request of the president.
- TIME LIMIT FOR DEBATE: The president may limit time for debate on any subject, and this rule takes precedence over the previous rule.
- THE VOTE: After the president has determined that no further debate is requested, a vote will be taken. If a
  vote is taken by ballot, members should mark their ballots when the president makes that instruction.
  Ballots should be folded <u>ONLY ONCE</u>. Tellers will collect the ballots at the appropriate time.
- PREFERENTIAL VOTING: In compliance with our bylaws, preferential voting will be used when there are
  two or more choices on issues, or two or more candidates for the elected officers. Therefore, when voting
  by ballot, voting members should mark their ballots by indicating first, second, etc., choices.
- ELECTIONS: If there is only one candidate for an office, and if there is no objection, the election for that
  office may be held by voice vote.
- NOMINATIONS FROM THE FLOOR: Nominations may be made from the floor provided the candidate meets eligibility requirements, the candidate gives their consent, AND THE PRESIDENT HAS BEEN ADVISED <u>BEFORE THE MEETING</u>.
- 11. CLOSING NOMINATIONS: Section 45 of RRONR states that the motion to close nominations should not be used as a means of moving the election of a candidate, <u>ESPECIALLY WHEN THERE IS ONLY ONE NOMINEE</u>. THEREFORE, IT IS NOT NECESSARY FOR MEMBERS TO MAKE A MOTION TO CLOSE <u>NOMINATIONS</u>. AFTER DETERMINING THAT THERE ARE NO FURTHER NOMINATIONS FROM THE FLOOR, THE PRESIDENT WILL DECLARE THE NOMINATIONS CLOSED BY GENERAL CONSENT, AFTER WHICH THE MEMBERS WILL PROCEED TO VOTE.

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## **Duties of Elected Officers**

## DUTIES OF ELECTED OFFICERS

<u>President</u>. The president shall preside at all meetings of this Association and at regular and special meetings of the Executive Committee; shall recommend appointments and committee chairs, subject to the approval of the Executive Committee; and shall generally manage the day-to-day business of this Association. The president serves as an ex-officio member of all committees, except for nominations, and is a signer on all bank accounts.

<u>President-Elect</u>. The president-elect shall assume the duties of president in the absence of the president, is a signer on all bank accounts, and shall perform such other duties as are assigned by the president or the members.

<u>Vice President</u>. The vice president shall assume the duties of president in the absence of the president and president-elect, and shall perform such other duties as are assigned by the president or the members.

<u>Recording Secretary</u>. The secretary shall keep the minutes of all meetings; shall give all notices in accordance with the provisions of this Association's Bylaws and Standing Rules; shall be custodian of this Association's records; and shall coordinate with the president or other officers in a timely manner in furnishing reports and other required information to the National Association.

<u>Treasurer</u>. The treasurer shall oversee the financial affairs of this Association under the direction of the Executive Committee; shall sign checks for authorized disbursements; shall prepare the annual budget with the assistance of the president and president-elect, which budget shall be presented to the members at the annual meeting for approval; and shall perform such other duties as are assigned by the president or the members.

Functional Governors (2). The functional governors shall serve as members of the Executive Committee; shall oversee specific strategic operations of the Association as prescribed by the Executive Committee; shall, in accordance with the Association's Vision Statement, coordinate the assessment of the members and chapters input into the ongoing updating of and improvements to the Vision Statement; shall serve as liaisons to specific standing committees as determined by the Executive Committee; and shall perform such other duties as are assigned by the president or the Executive Committee.

## DUTIES OF PARLIAMENTARIAN (Appointed)

The Parliamentarian shall be appointed by the president to advise the president and members on procedures when requested; to interpret the bylaws, standing rules, and adopted parliamentary authority when requested; and to process all amendments to the bylaws and standing rules of this Association; and to assist local chapters with parliamentary procedure as needed.

## Office of President-elect

# Donice Alford, PP, PLS President-Elect

It is a true honor to be nominated for the office of President-Elect for 2014-2015.

This office carries with it a serious responsibility to the follow members and requires dedication, perseverance and hard work. I would welcome the challenge that this office brings as we attempt to reach out to our legal community and promote what we have to offer in these trying times we face.

I have been an active member of this association since 1998 and have previously served TALS in several capacities, including Governor — Strategic Planning, as TALS President-Elect, President and Past President. Having earned my PLS certification in March of 2001 and my PP certification in 2004, provides me the opportunity to continue serving as an Exam Administrator as well. I have worked in the legal field in various capacities for over 30 years.

I have served in several capacities for my local Chapter, NALS, Nashville Chapter and also served on the national level as a member of the Membership Committee and more recently on the Marketing Committee.

I am excited about the upcoming year and enjoying the activities and events that are planned within our association. I am also looking forward to serving the association and its members in a leadership capacity and promoting our association with excitement and diligence. I would be honored to have the opportunity to serve on any level as the membership so chooses and look forward to working with the membership and leadership to prepare for a year of excitement and educational events.

I look forward to working with Mary Pewitt as she takes the helm this year and know she'll do us all proud!

## Office of President-elect

### Donna R. Jenkins

## **Statement of Qualifications**

## February 2014

Acceptance of nomination for the office of President-Elect <u>TALS</u> for 2014-2015.

I am honored to accept the nomination for President-Elect of TALS for 2014-2015. My qualifications are as follows:

I have been a legal secretary since March of 1968. I have worked for sole practitioners, small firms, medium firms and the largest has been Baker Donelson where I am now employed and have been since September 1990 (22 years). Prior to Baker Donelson, I worked for twelve years with an attorney who practiced Labor and Employment Law and Social Security Benefit Appeals. I have worked in many types of law but I have enjoyed my tenure at Baker Donelson in the Litigation Department. I assist three attorneys who are mainly involved in business litigation and medical malpractice.

In 1975, I obtained a Certified Legal Secretary Certificate (equivalent to ALP certification).

I obtained my PLS certification in September of 2011, and my PP Certification in March of 2012.

I have been a member of Memphis Legal Secretaries' Association at different times over my career. This membership has been since 2008. I have served our local chapter as Recording Secretary, President-Elect and President.

I have served at the state level as Recording Secretary and Vice-President.

I think that I am a very capable leader and look forward to serving in any capacity.

Respectfully,

Donna R. Jenkins, PP, PLS, CLS

# Office of Recording Secretary

## Victoria ("Vickie") A. Hellmer, PLS

I have been nominated to serve in the position of Recording Secretary for TALS for the 2014-2015 term and I have proudly accepted.

I am currently the assistant to Shareholders, Joseph M. Huffaker and Jason M. Pannu, and Associate J. Dale Crow, of the firm of Lewis, Thomason, King, Krieg & Waldrop, P.C., in their Construction Litigation Practice Group at our Nashville office. I am a Certified PLS, having obtained my certification in March 2007 and my recertification in 2012.

I have been a member of NALS since 2004 and have served as Marketing Director 2006-2007, Co-Certification Director and Employment Director 2007-2008, Governor and Certification Director 2008-2009, President-Elect 2009-2010, and was elected President for the 2010-2011 term, of our Nashville Chapter. I was also the Journalist for the Chapter's monthly newsletter, The Verdict, from 2010-2012. I have served on many Committees as Chairperson in our association with the most recent being the Annual Bosses Luncheon, for the last two years. I also manage the Nashville NALS "Bulletin Board" for members who want to sell, rent, buy, or trade items or services with our members.

I was elected to the office of President for TALS for the 2012-2013 term, President-Elect for 2011-2012, and Vice-President in 2008-2009. I served as the Recording Secretary for 2009-2010 and as the interim Ways & Means Chair for 2010-2011.

I am the mother of three adult children; two daughters and a son. I have two grandsons and a granddaughter that I love and miss very much, as they live in Indiana. I am an avid bass angler and compete in monthly tournaments and fish the women's pro circuit with the LBAA (Ladies Bass Anglers Association) every time they come to Tennessee. I currently am a member of the Stones River Bass Anglers, B.A.S.S. and FLW associations.

I attend all the TALS meetings, events, and seminars and try to go to some of the NALS national conventions. I would be honored to serve in any position on the TALS Executive Committee. I have never met a better group of women and am proud to be a part of this association. I would like to thank you in advance for your vote and your confidence in me to serve TALS to the best of my ability.

# Office of Recording Secretary

Sharon L. Wilcox
Qualification Statement
Nomination for Recording Secretary 2014-2015



I am Sharon L. Wilcox and I would be honored to be the next Recording Secretary for TALS. Since becoming a member of NALS in 2011, I have taken advantage of the multi-level association and I realize that being a member of NALS has afforded me the opportunity to meet people, not only from my own chapter, but from chapters across Tennessee and the United States. I have a profound sense of pride in being a member of an organization that holds us to such a high code of ethics. The NALS sisterhood surpasses no other. When you are in need of assistance of any type, you know that a member is always willing to lend a hand, whether in your own chapter or from another state.

In October 2013, I had the opportunity to attend the 62<sup>nd</sup> Educational Conference & National Forum held in Atlanta, Georgia, and this was an experience that I will never forget. I have been active in both NALS, Nashville Chapter and TALS, have held various positions within my local chapter, and have attended every state meeting. I can say that I have a great outlook and understanding on what is needed and required to be a leader in TALS.

Since I joined NALS, I have held the following position within both local and state chapters:

## Nashville:

2013-2014

2013-2014	Recording Secretary
2013-2014	Governor
2012-2013	Recording Secretary
2012-2013	Marketing Director
2012-2013	Co-Chairperson Certification Drive
TALS:	

Chair, Scholarship Committee

On a personal level, I love reading, camping, and spending quality time with my family. On a professional level, I have always been willing to take great personal risks and push beyond my comfort zone. I believe that we all should become a force in our communities and make a difference in someone's life. I would be honored if you would vote for me!

## Office of Treasurer

## GLORIA J. THOMAS, PP, PLS, CP QUALIFICATIONS STATEMENT

Paralegal/Office Manager with Shaver & Smith, P.A., in Wynne, Arkansas, since 1974. Member-at-Large, Arkansas Association of Legal Secretaries 1990-1991 Member, NALS...the Association for Legal Professionals since 1990 Member, TALS-Legal Professionals of Tennessee since 1991 Member MLSA - Legal Professionals of Memphis since 1991

#### Certifications:

Certified Professional Legal Secretary (PLS) from NALS - March 1992; Re-certified through 2014 Certified Legal Assistant/Certified Paralegal (CLA/CP) from NALA – February 1996; Re-certified through 2016

Certified Professional Paralegal (PP) from NALS - March 2004; Re-certified through 2014

## National Association Service:

Attended NALS Annual Meetings in Anaheim, CA (1992); Orlando, FL (1994); Las Vegas, NV (1995); Nashville, TN (1996); Boston, MA (1997); Minneapolis, MN (1998); Houston, TX (1999); Honolulu, HI (2001); Greenville, SC (2002); Biloxi, MS (2004); Buffalo, NY (2005); Reno, NV (2006); St. Louis, MO (2007); Irvine, CA (2009); Branson, MO (2010); Cincinnati, OH (2011)

Attend Professional Development Conference in Tulsa each year NALS Education Committee Chair 1997-1998
Attended most Region 4 Meetings

## State Association Service:

Attended TALS meetings since 1992

Chair, TALS Ways & Means Committee 1994

TALS President 1996-1997

TALS Regional Liaison to Region 4 1997-1998

Attended first-ever Region 4 Meeting and led workshop for

State Presidents and Presidents-Elect

TALS Functional Governor/Strategic Planning 1999-2000

TALS Functional Governor/Marketing 2003-2004

TALS Recording Secretary 1995-1996, 2005-2006

TALS Parliamentarian 1998-1999, 2000-2001, 2004-2005, 2006-2007, 2007-2008

TALS Treasurer 2001-2002, 2008-2010, 2011-2013

## Local Chapter Service:

MLSA Committees 1991, 1992

MLSA Parliamentarian 1993-1994, 1999-2000, 2000-2001, 2005-2006

MLSA Member of the Year 1995

MLSA Governor 2001-2002

MLSA President-Elect 2002-2003

MLSA President 1994-1995, 1995-1996, 2003-2004

MLSA Recording Secretary 2004-2005

MLSA President-Elect 2009-2010

MLSA President 2010-2011

MLSA Treasurer 2006-2007, 2007-2008, 2008-2009, 2012-2013

# Office of Functional Governor — Marketing

Theresa D. Estopare, PP, PLS, SC-Litigation/Civil Law

Qualification Statement Functional Governor - Marketing 2014

I began my life in the legal community at a law firm in Virginia Beach, VA in 1999. I have worked as a legal secretary/legal assistant/paralegal in many areas of law including, but not limited to bankruptcy, tax, foreclosure, title clearing, litigation, corporate, securities, FINRA, SEC, and business advocacy. I am currently a legal secretary at Baker Donelson Bearman Caldwell & Berkowitz PC's Memphis Office, working directly for 5 attorneys. I have been with BDBCB since January of 2011.

I have been a member of MSLA/TALS/NALS since March of 2005.

I have attended numerous local, regional, state and national meetings - I have missed very few since becoming a member. I am currently the Vice President (Membership) of the Memphis Chapter, the President of TALS, and I am serving my 6th year on the Certifying Board of NALS.

I have served as publisher/editor of The Legal Appeal, Recording Secretary, Treasurer, Vice-President, President-Elect, and President of MLSA. I have assisted with certification study groups and chaired several committees.

I have served as Ways and Means Chair, Secretary, Vice President, President-Elect and President of TALS. I have also chaired the Scholarship Committee and the Nomination Committee.

I am an advocate for MLSA/TALS/NALS and believe I would be an asset to this association as Functional Governor-Marketing. I believe it is vital for our association to market itself and our functions if we are to grow not only in size but in visibility and respect within the legal community of Tennessee. TALS has a lot to offer the legal community and I would welcome the chance to market us not only in areas where we currently have chapters, but in areas where future chapters could be formed.

# Office of Functional Governor—Marketing

## TIFFANY BURFORD TAYLOR

Running for Functional Governor - Marketing

Intend to run from the floor for President-elect.



Despite being a young member of NALS, Tiffany Burford Taylor has been extremely busy. A native of Flint, Michigan, Tiffany graduated from Florida A & M University in 2000 and went on to law school in Georgia. After realizing she did not want to be an attorney, Tiffany moved to Dallas, Texas, where she worked as a legal assistant/paralegal at Fulbright & Jaworski, LLP a/k/a Norton Rose Fulbright. After being hired at Waller Lansden Dortch & Davis, LLP, in Nashville, Tennessee, Tiffany joined NALS in 2009, and she has been serving NALS ever since.

Tiffany has held many offices, served on many committees on the local, state, and national levels including, but not limited to, Vice President of TALS-Legal Professionals of Tennessee, member of the Membership Committee and Think Big Committee, chairman of the Next Generation Leadership Committee, and is the current president of NALS...the association of legal professionals, Nashville Chapter. She has even presented twice at the NALS Professional Development Conference in Tulsa, Oklahoma. In 2012, Tiffany received the Nashville Chapter's Award of Excellence as a tribute to her hard work and dedication. Tiffany is currently serving as the national Chairman of the NLP Task Force for 2014 - 2015.

Outside of NALS, Tiffany volunteers with United Way of Metropolitan Nashville and currently serves as an Ambassador for the R. H. Boyd Leadership Society. She is active in her local church, serving on the praise and worship team and as a Sunday school teacher. In her spare time, she enjoys reading and writing novels and gaming.

Term	Position
2014 - present	NALS New Legal Professionals Task Force (Chairman)
2013 - 2014	NALS Next Generation Leadership Committee (Chairman)
2013 - 2014	Nashville Chapter President
2012 - present	TALS Journalist
2012 - present	Nashville Chapter Journalist
2012 - 2013	Nashville Chapter President-elect
2011 - 2013	Nashville Chapter Membership Director
2011 - 2012	Nashville Chapter Secretary
2010 - present	Nashville Chapter Webmaster / Social Media
2010 - present	TALS Webmaster / Social Media
2010 - 2011	NALS Membership Committee
2010 - 2011	NALS Think Big Committee
2010 - 2011	TALS Vice President
2009 - 2011	Nashville Chapter Treasurer

# Office of Functional Governor Strategic Planning

## GAIL POWELL, PLS QUALIFICATIONS STATEMENT

I started in the legal field working for the oldest and largest Intellectual Property law firm in Michigan around 1988. I worked for the largest law firm in Tennessee and the most renowned Intellectual Property boutique law firm in Texas. I have worked as a Legal Assistant/Paralegal for law firms and corporations all these years. I have been semi-retired since March 2009.

## Membership:

NALS...the Association for Legal Professionals, Tennessee Association of Legal Secretaries (now TALS-Legal Professionals of Tennessee) and Memphis Legal Secretaries Association (MLSA - Legal Professionals of Memphis) - 1991 – 1998 and in 2005 - Present

Member-at-Large, Houston Association of Legal Secretaries - 1998-2004

#### **Certifications:**

Certified Professional Legal Secretary (PLS) from NALS -1994 Re-certified - 2009

National Association Service: Legal Education Product Committee Editorial Board

State Association Service:
TALS President
Vice President
Functional Governor/Marketing
Ways and Means Committee
Other Committees

Local Chapter Service:
President
President-Elect (Membership and Education)
Vice President (Membership and Education)
Governor
Committees
Member of the Year

Respectfully submitted, Gail Williams, PLS

# Memphis Governor's Report

## Governor's Report

Date: April 10, 2014 Chapter: Memphis

## MLSA

#### MEETINGS/EDUCATION

Our meetings are held monthly on the second Thursday at Just for Lunch.

January: Our speaker was Dr. Katherine Tackett, Hearing Centers of West Tennessee, Inc. She

explained that a lot of times people who have hearing loss are not treated as having a disability, but just stubborn or non-compliant. Not wanting to hear what is said. It was very interest. She

brought a tiny hearing aid for us to see just how unnoticeable these devices can be.

February: Linley Richter, Esq. spoke to us regarding the Defense of Marriage Act which every state is facing

now. It is a very, very controversial issue. Some of the states allow and recognize same-sex marriage, others do not. What happens when a couple goes to a state that recognizes the same-sex marriage, then resides in a state that does now. What happens if later they want a

divorce and live in a state that does not recognize the marriage? Lots to think about.

March: Ari Sauer, Esq. spoke to us on immigration law and even though we lead his astray from his

planned presentation, he gave us some very informative and interesting information

#### MEMBERSHIP

We currently have 20 members.

## WAYS AND MEANS

We currently are still selling our MLSA Directory for Law Offices.

#### OTHER ACTIVITIES

MLSA continues to be involved with the Memphis Area Legal Services (MALS) Saturday legal clinics.

## TALS

Register now for our upcoming annual meeting in Nashville on May 17.

## NAIS

Register now for the Annual Meeting in October in Houston, TX. Lots of CLE – 16.5 hours!!!

Vicky C. LaPradd. PP. PLS

Vicky C. LaPradd, PP, PLS Governor, Memphis Chapter

# Nashville Governor's Report

## NALS...the association of legal professionals, Nashville Chapter Governor's Report

Nashville Chapter congratulates its newly elected 2014-2015 Board Members:

Brenda Wolfgang President
Sharon L. Wilcox President-elect
Theresa Marchese, PLS Recording Secretary

Elise Hill, ALS Treasurer Tiffany Taylor Governor

<u>Membership</u>: The Nashville Chapter would like to welcome our newest members: Carole Briggs with Briggs Court Reporting, Lisa Davis, CP with the office of Burr & Forman, Laura Hale with Richards & Richards, Patti McCoy with the office of Lewis Thomason King Krieg & Waldrop, Tamesha Hill (student member), and Rex White (student member). The total members in the Nashville Chapter is 41.

<u>Nashville's Lunch & Learns</u>: Are held on the second Wednesday of every month and the following are the CLE's that was offered:

January - Barbara Holmes of H3GM, who spoke on Business Law.

February - Caitlin Moon of C. Moon Law., spoke on Social Media and Law Firms.

 March – Wally Irvin of Lewis, Thomason, King, Krieg & Waldrop, P.C., spoke on the Nuts and Bolts of Construction Law.

April – Robin White of Frost Brown Todd, LLC, who will be speaking on Bankruptcy.

#### **Events and Upcoming Events:**

Nashville held its Annual NALS – Legal Professionals Night Out – Music City Mardi Gras event at B.B. Kings on March 4, 2014. A big thank you to Donice Alford, PP, PLS, for putting together a wonderful event. Congratulations to Vickie Hellmer, PLS who was crowned Queen of the Krewe of NALS.

Nashville's NALS Chapter Elections started April 2, 2014 and ended on April 8, 2014.

Nashville's Membership Meeting will be held on Monday, April 14, 2014, at Noon at the offices of the Nashville Bar Association.

Nashville will be hosting the TALS Annual Meeting scheduled for May 17, 2014. CLE training will be held at Waller Lansden Dortch & Davis, LLP, and installation will be held on the General Jackson. Check The Junction and The Verdict for further details.

# Nashville Governor's Report...cont.

Nashville is preparing for its Second Annual NALS After Hours Silent Auction to be held Thursday, July 10, 2014, at the offices of Baker Donelson Bearman Caldwell & Berkowitz, P.C. Check The Junction and The Verdict for further details.

Sharon L. Wilcox, Governor Nashville Chapter April, 2014

# Member Contact Information

## **Member Contact Information**

In an effort to have up-to-date contact membership contact information, please complete the following information and either email or mail to Gloria Thomas, PP, PLS, CP

Full Name:
Firm/Company Name:
Address:
Preferable Contact Number:
Fax Number:
Area of Practice:
Birth Date (Month/Day):
Year joined NALS:
Preferred Email Address:

Send this form to:

Gloria Thomas, PP, PLS, CP

P.O. Box 831

Wynne, Arkansas 72396

Tel: (870) 238-2317

gjthomas@sbcglobal.net

# Membership Application



inspire enhance promote

# Membership Application

Application Date:	Membership Category
Local Chapter Name:	O \$197 International Membership (US Currency Only)
	O \$130 New Member Dues
Last Name First Name	O \$75 Associate Member (educators, judges, attorneys)
Home Address:	O \$29 Student Member (minimum 9 credit hours required)
City:State:Zip:	
Employer:	State Association Dues
Position Title:	Make an
Business Address:	Total Due \$
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Preferred Mailing Address: O Home O Business	Payment Method
Home Phone:	Payment must accompany application. There will be a \$20
Business Phone:	charge for returned checks. Make checks payable to NALS.
Fax:	
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Would you like to receive monthly legal education via email?	O MasterCard O Discover
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O Other (specify):	NALSthe association for legal professionals
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Years Worked in the Legal Profession:	Tulsa, OK 74145
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If you were sponsored by a current NALS member, please list below:	Applicant's Signature
Sponsor's Name:	
Sponsor's Member Number:	Membership is nontransferable.
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	mombaschin chair

The Junction is the official publication of TALS, Legal Professionals of Tennessee.

Publication submissions should be addressed to Tiffany Burford Taylor, Waller Lansden Dortch & Davis, LLP, 511 Union Street, Suite 2700, Nashville, Tennessee 37219 or tiffany.taylor@wallerlaw.com.

Material must be received by the publication deadline announced at the quarterly TALS meeting, printed in The Junction or as listed on the TALS website (www.talstn.org).