



**NCPA**



The Association of  
Legal Assistants • Paralegals

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Affiliate Member  
of the  
National Association  
of Legal Assistants, Inc.

North Carolina Paralegal Association, Inc. Fall 2005

# Forum

*noun* [C]; *fôr-əm*  
an occasion or a place for talking about a matter of public interest

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## Settlement Agreement and Release

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Editorial Staff  
Laura C. Braswell  
Senior Editor

Chris Reeves  
Advertising Editor/  
Patron & Sustaining Chair

Alison E. Foster  
Articles/Association News Editor

**Contact Information:**

The North Carolina Paralegal Association, Inc.  
Mary F. Haggerty, CLA, Coordinator  
PO Box 36264, Charlotte, NC 28236-6264  
704.535.3363  
fax 704.372.9881  
www.ncparalegal.org

**Subscriptions e-mail:** laurapcubillos@yahoo.com  
**Articles e-mail:** alison.foster@meineke.com  
**Advertising e-mail:** chris@pwkl.com

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Address correspondence to NCPA at the Contact  
address above.

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los@yahoo.com.

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**The North Carolina Paralegal Association, Inc.**  
**Mary F. Haggerty, CLA, Coordinator**  
**PO Box 36264, Charlotte, NC 28236-6264**  
**704.535.3363**  
**fax 704.372.9881**  
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# President's Message

**Erin N. Burris, CP**



As I write this, it's been almost 5 months since NCPA's 25th Annual Meeting and Seminar in Wrightsville Beach, NC. During these past months, I have seen and experienced a variety of things that have made this opportunity as President an invaluable experience. This year NCPA's Board and Executive Committees are comprised of a handful of new faces mixed in with the old. By now, most of us have become comfortable in our new roles; and I want to thank all of the members of our Executive Committee and Board for their hard work, dedication and guidance to me, to our current members and to our future members.

On July 1, 2005 the NC Board of Paralegal Certification began accepting applications for NC paralegals to become Board Certified. What will this certification do? Hopefully raise the standard of the paralegal profession. The application is available online at [www.nccertifiedparalegal.org](http://www.nccertifiedparalegal.org) and in NCPA's membership booklet. This was in the making for quite a few years. We owe a lot to the people who served on NCPA's Regulation Task Force and the Alliance for Paralegal Professional Standards (APPS).

July 12-16, 2005 I attended my first NALA event, the NALA 30th Annual Meeting and Seminar, held in Kansas City, Missouri. Other NCPA members in attendance were Belinda Thomas, Darlene Patz, Mary Haggerty, Amy Hill, Terry Irvin and Sharon Robertson. The theme for this year's seminar was Pearls and Polos, and by the end of the seminar several attendees had so many beaded necklaces it looked like Mardi Gras!

The welcome banquet was a costume party and what a blast that was! Terry, Darlene, Sharon and myself were all Justices of the Supreme Court. Belinda was the Phantom of the Opera.

We were able to taste some of the local cuisine at Jack Stack's, barbecue (quite different from North Carolina's barbecue but very tasty) and a wonderful corn bake. A group of us also rode in a horse-drawn carriage navigated by Darlene Patz!

The educational tracks available included: Essential Skills,

Leadership, Corporate Law and A la Carte. I attended the Leadership track. Bruce Jacobi of National Corporate Research, one of NCPA's supporters, spoke about "Creative Thinking & Problem Solving for Busy People." Kathryn Myers of Saint Mary of the Wood's College discussed "Communication Skills: Confidence, Credibility & Composure." A sole practitioner, Michael Wagner, discussed "Working toward a Paperless Office." Kenneth Frakes, a Marketing Communications Consultant discussed "Walking the Walk."

Belinda Thomas received two awards: The Affiliates Award and a "Make a Difference" Award. She had no idea she was to receive the latter and the expression on her face was priceless. Sharon Robertson was reelected as NALA's Region II Director. Congratulations to them both.

Among the business matters at the Annual Meeting, there was also a look back at NALA since its inception 30 years ago. How far NALA and the paralegal profession have come!

I made new friends, learned new things and had a wonderful time. I can't wait for NALA's 31st in Tampa next summer. I want to thank Terry Irvin, Chair of the Annual Convention Committee, and all the other NALA members who played a part in organizing this outstanding event.

Lastly, I want to invite you all to attend NCPA's 21st Mid-Year Seminar & CLA Review Course in Greensboro, September 16-17. We have confirmed speakers on Paralegal Certification, Real Estate matters, Settlement Documentary Videos, Family Law Mediation, and Ethics. Please also mark your calendars for NCPA's Annual Meeting and Seminar in Atlantic Beach, NC, March 31 - April 1, 2006.

As always, if you have comments or ideas we want to know. NCPA's Board and Executive Committee members volunteer in NCPA to serve you. We want you to get the most out of NCPA. Please let us know how we can do better.

Thank you and I look forward to seeing you in Greensboro!



# Chairman's Message

**Belinda A. Thomas, CLAS**



As the fellow said in "Oklahoma", there were big things going on in Kansas City, just not after 6:00 p.m. in the evening! The NALA Convention was held in downtown Kansas City on July 12-16. We had a wonderful time but they really do roll up the sidewalks early there. We had to take cabs to

where the restaurants were located. Now that brings up another whole story, cabs and cab drivers.

Let me start at the beginning. My flight out of Raleigh Durham was to leave at 7:00 p.m. When I arrived at the airport, there was a notice on the sign that my flight was delayed. There were some bad storms in Atlanta so there was a two hour delay. The lady at the counter told me I might or might not have a flight to connect to Kansas City once I arrived in Atlanta. So two and one half hours later, I left Raleigh Durham not knowing if I would be sitting in the Atlanta airport until the next day. When I arrived in Atlanta, there was another two hour delay. When we finally boarded the plane, we sat on the tarmac for another one and one half hours waiting on a plane from Myrtle Beach to arrive. When I finally landed in Kansas City, it was 2:00 a.m. our time. The plan was to get a shuttle to the hotel. Unfortunately, the shuttle quit running at midnight, so guess what? I called a cab. This was experience number one with cab drivers in Kansas City. Here I am, a woman alone, in an airport that completely shut down after my flight arrived. I picked up the courtesy phone and asked for a cab. The lady told me to look for cab number 1719 and it would be there in two minutes. By the time I walked to the door, a dark blue Lincoln squeals to a stop at the curb. The fellow had obviously just arrived from Jamaica or the Bahamas an hour before he picked me up. Talk about a heavy accent! We drove through the city at 2 a.m. at 70 miles per hour. Forty five minutes and \$44.00 later, I arrived at the hotel. After getting out and kissing the ground, I dragged myself to my room and went to sleep.

On Wednesday evening, a group of us went to the Cheesecake Factory for dinner. An interesting English speaking driver with long gray hair picked us up in the cab. Erin Burris made the mistake of telling the driver we were from North Carolina. I found out very fast that there are some people in Kansas City who do not have a good opinion of Roy Williams. While he was going on his tirade about Roy and UNC in general, we were holding on to the handles of the car and dodging cones in the road. Erin kissed the ground this time.

On Thursday, Mary Haggerty, Cindy Frye and I went to the Truman Presidential Library in Independence, Missouri. By the way, again we went by cab (some people never learn). We were getting on a highway when we hit some massive bumps in the road. Cindy was screaming, "I thought there were bad potholes in Charlotte!" Mary then informed us that those weren't potholes. The driver had gone over speed bumps in the road at 55 miles per hour. Bo and Luke Duke had nothing on us. Our driver was from Somalia and spoke VERY limited English. (I think he had been in

the states less time than the guy from Jamaica.) He smiled a lot and nodded at whatever we said. When it was time to return to the hotel, he went to Main Street to pick us up as instructed, just not Main Street in the city we were in. When he finally found us in Independence, Missouri, Mary had to stand in the street to get him stopped. She's some woman! We had trouble getting him to see a few stop lights, but other than that, we returned to the hotel safely, in the right city and the same day. This time, we all three kissed the ground.

Life is short and for a while, I thought it was going to be shorter than I first believed. However, it was a wonderful trip and I'm thankful to my firm and NCPA for the opportunity to attend this wonderful event.

I want to say again how proud I am to be a part of NCPA. We are very highly recognized and regarded at the national level. You have an organization to be proud of.

Now on to NCPA news. I have scheduled the following dates for Meet and Greet:

- District II - January 14, 2006 in Raleigh**
- District III - February 4, 2006 in Fayetteville**
- District IV - October 22, 2005 in Burlington or Greensboro**
- District V - October 8, 2005 in Charlotte**
- District VI - September 10th in Winston-Salem**
- District VII - December 10th in Asheville**
- District IX - February 18, 2005 in Hickory**

Details will be coming later.

I hope to see you all at the Mid Year Seminar, September 16th and 17th. This is going to be a wonderful event. Ruth Goodman, CLA and I are working hard with Melissa Stockley Jones, CLA to put together a memorable time. See you there!

## Moving?

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**The North Carolina Paralegal Association, Inc.**  
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## Editor's Court

Laura C. Braswell, Senior Editor



Ask and you shall receive. This issue of the Forum is a compilation of submissions from many NCPA members. It was inspiring and enlightening to receive several articles from our fellow NCPA members for this issue of the Forum. The Forum, which is defined as a meeting to discuss matters of general interest, is a medium for you, the reader, to express your interests, concerns and ideas relating to the paralegal profession. Thank you to all who contributed to this issue for your creativity and initiative. I would especially like to thank Alison Foster, Articles Editor, for all of her hard work and determination. As always, the Forum staff continues to urge the Forum's readers to participate and support this "meeting" by contributing an article or item of interest.

This issue's features include an article on our own Chairman, Belinda A. Thomas, CLAS, an article discussing the importance of taking the time to really listen to what our clients are telling us and a wonderful new list of useful websites. A new section of the Forum is the State-wide News & Seminars section. If you have a seminar or news of interests to the paralegal profession, please submit it to the Articles Editor, Alison Foster, for consideration.

Also in this issue, you will find information on NCPA's Student Scholarship Essay Contest and information on the nominations of Officers and Directors for the 2006-2007 membership year. Make sure to review the Calendar of Events for all upcoming NCPA deadlines and events.

Thank you to Trudy Rutherford for inspiring the new Perks of the Business section. If you have an experience to relate that you consider a perk of the business, please submit it to the Senior Editor at [laurapcubillos@yahoo.com](mailto:laurapcubillos@yahoo.com).

Last, but certainly not least, please take a moment to read the NALA Liaison's highlights of this summer's 30th Annual NALA convention and to take a look at all of the great pictures from the seminar.

As always, thank you for taking the time to read the Forum. Perhaps this issue will motivate you to submit your own inspiring and informative article.

**WERE YOU A  
RECIPIENT OF A  
NCPA  
SCHOLARSHIP?**

**HOW DID  
RECEIVING THE  
SCHOLARSHIP  
INFLUENCE YOUR  
CAREER?**

**WHERE ARE YOU  
NOW?**

Please email the  
Senior Editor at  
[laurapcubillos@yahoo.com](mailto:laurapcubillos@yahoo.com)  
if you are interested in  
including your story in  
the next issue of  
*The Forum.*

## *Are you interested in becoming a North Carolina Certified Paralegal?*

Please visit the North Carolina State Bar website on Paralegal Certification, [www.nccertifiedparalegal.org](http://www.nccertifiedparalegal.org), to receive information on how to become a North Carolina Certified Paralegal. The Alternative Qualification Period runs from 7/1/2005 - 6/30/2007.

To become a NC Certified Paralegal during the Alternative Qualification Period you must fulfill the requirements of at least one of the following methods of certification:

1) Possess at least a high school diploma and have 5000 hours of experience working as a NC paralegal during the five (5) years prior to application and have taken a three (3) hour ethics course.

2) Possess a current CLA, RP, or other national paralegal credential approved by the board and have 2000 hours of experience working as a NC paralegal during the two (2) years prior to application.

3) Possess a degree in paralegal studies from a qualified paralegal studies program or possess an undergraduate degree in any field plus the equivalent of 18 hours of paralegal coursework from a qualified paralegal studies program and have 2000 hours of experience working as a NC paralegal during the two (2) years prior to application.

# NALA Liaison Report

## Darlene M. Patz, CP



Congratulations to the following people who passed the CLA Exam given in March of 2005: Stacey D. Brown of Archdale, Renae Elam of Charlotte, Cynthia T. Frye of Belmont, Jill N. Fullwood of Oak Island, Nancy K. Johnson of Winston-Salem, April Miller of Greensboro and Joyce A. Ward-Harris of Raleigh. Additionally, congratulations to Phyllis L. Dunham, CLAS of Charlotte and Heather Rowland, CLAS of Holly Springs for passing the Intellectual Property Specialty Exam. Currently, there are 363 CLAs and 56 CLA Specialists in North Carolina.

NALA's 30th Annual Convention, "Pearls of Wisdom from the Heartland," was held July 13 - 16, 2005 in Kansas City, Missouri. It was my first NALA Annual Convention and I thoroughly enjoyed it. Our own Terry Irvin, CLA was the Annual Convention Chair and did a fantastic job! Also representing NCPA were Belinda Thomas, CLAS (Board Chairman), Erin Burris, CP (President) and Sharon Robertson, CLAS (NALA District II Director).

Tuesday evening the festivities kicked off with the Pearls and Polos Early Bird Reception hosted by the affiliated associations in Region VI, with Kansas Association of Legal Assistants and the Heartland Association of Legal Assistants coordinating the activities.

Wednesday morning, Debra J. Monke, CLAS, NALA President, welcomed convention attendees. Following President Monke's opening remarks was the Keynote Address by The Honorable Carol A. Beier, Justice, Kansas Supreme Court. Justice Beier spoke on The Road to Peace: Marrying the Ethics of Care and Justice. At the conclusion of the General Session attendees participated in various educational program tracks which included: Essential Skills, Corporate Law, Leadership and A la Carte.

After an All Convention Luncheon, the Affiliated Associations Annual Meeting was held. Nancy E. Mendenhall, CLA was elected Affiliated Associations Director and Karen Greer McGee, CLAS was re-elected to Affiliated Associations Secretary. The 2005 Affiliates Exchange Presentation followed with a seminar on "Developing the Cutting-edge Newsletter," by Ronald A. Stuart, CLA and Cindy L. Hayes, CLA of the Tulsa Association of Legal Assistants.

Wednesday evening's Opening Night Reception was especially festive with a costume party theme of a favorite celebrity from the past 30 years. Great minds must think alike as there were two sets of Supreme Court Justices in attendance, one of which included yours truly. Thursday, after a morning of educational track programs, the 2005 Membership Forum was held. Topics discussed included Professional Development, Continuing Education, Certifying Board and the Specialty Task Force.

Of great interest at the Membership Forum was discussion of the newly created Advanced Paralegal Certification (APC) credential and curriculum based program. The credential awarded will include the paralegal's certified status and demonstration of advanced knowledge in the specific practice area or areas. The transition from the CLA Specialty program to the APC program will take place in the fall of 2005. The last administration of the CLA specialty examinations took place in July of 2005. In the fall, curriculum-based Internet learning and assessment process programs on Contracts Administration/Contracts Management, Discovery,

and Business Organizations will begin.

Those who currently have the CLAS credential have an option. CLA Specialists may either continue using the CLAS credential or choose to begin using the APC credential once the program begins. The CLA may use the APC credential with the practice area, such as APC-Civil Litigation, APC-Bankruptcy, etc. All CLAS will be notified in writing about use of the credential. For more information regarding the APC please visit <http://www.nalanet.org/APC.htm>. NALA introduced its first synchronous Internet educational program a year ago as a convenient and cost effective alternative for CLE. This fall is the launch of the third program of presentations. For more information please log on to <http://www.nalacampus.com>.

Early Friday morning, the annual Affiliate Exchange was in full force with exhibits from many affiliate associations offering information on their organization as well as regional treats. NCPA distributed issues of the Forum and brochures for the upcoming 21st Mid-Year Seminar and CLA/CP Review Course - all of which were snapped up early in the day. Back by popular demand, the NCPA exhibit also offered blister-fried peanuts as well as Tar Heel cookies.

After Friday morning continuing education seminars and lunch, the NALA Annual Meeting was held. The new officers for the 2005-2006 year are as follows:

**First Vice President:** *Tita Brewster, CLA, Las Cruces, New Mexico*

**Second Vice President:** *Linda J. Wolf, CLAS, Dallas, Texas*

**Secretary:** *Karen G. McGee, CLAS, Shreveport, Louisiana*

**Treasurer:** *Sharon A. Werner, CLA, Taylor, Michigan*

**Region II Director:** *Sharon G. Robertson, CLAS, Linville Falls, North Carolina*

**Region III Director:** *Libby Roleson, CLAS, Memphis, Tennessee*

**Region IV Director:** *Cassandra Oliver, CLA, Tulsa, Oklahoma*

The NALA membership also adopted the proposed amendments to the NALA Bylaws which create an Advanced Paralegal Certification Board for NALA's newest program.

Friday evening's festivities began with a reception and installation of officers followed by the Awards Celebration Banquet. Award recipients were:

**Founders Award:** *Pamela J. Bailey, CLAS*

**President's Award:** *Janet L. Holmgren, CLAS*

**Affiliated Associations National Achievement Award:**

*Vicki J. Kunz, CLAS*

**Affiliated Associations Outstanding Contribution Award:**

*Christine J. Garber*

The 2005 Affiliates Awards recipients are nominated by each NALA affiliated association. This award recognizes the service and contribution of NALA members to state and local paralegal organizations. NCPA's own Belinda Ann Thomas, CLAS was recognized for her special contributions. Additionally, Belinda has been appointed to NALA's Certifying Board for the CLA/CP exam for a three-year term. Congratulations, Belinda!!

Member Exchange Presentations on The Art & Science of Witness Interviews and Stellar Presentations with Confidence, Style & Finesse were held concurrently Saturday morning. The convention closed with a General Session covering ethics by Vicki Voisin, CLAS of Charlevoix, MI. The 31st Annual Convention will be held in Tampa, Florida, July 26 - 29, 2006 at the Tampa Marriott Waterside Hotel & Marina. For details please visit [www.nala.org](http://www.nala.org).

*NCPA will offer its annual CLA Review Course September 16 - 17, 2005 in Greensboro at the Embassy Suites Greensboro.*

*continued on next page...*

NALA Liaison Report continued...

**Upcoming NALA dates and deadlines:****October 1, 2005 CLA/CP Exam Deadline for December testing****October 1, 2005 2006 NALA Member Exchange Proposal Deadline****October 20 - 22, 2005 CLA/CP Short Course, Charlotte, NC****December 2 - 3, 2005 CLA/CP Exam****February 1, 2006 NALA Campus LIVE! Spring 2006 Program**

For further information on NALA or the CLA/APC programs, please contact me at [dmp1002@carolina.rr.com](mailto:dmp1002@carolina.rr.com).  
Please see page 21 for pictures from the 2005 NALA Annual Convention.

## *Where Are They Now? NCPA Scholarship Winners*

*Elizabeth Vance, a paralegal with the law firm of Wyatt Early Harris Wheeler, LLP, in High Point, NC, shares her story of receiving a NCPA scholarship and how the scholarship influenced her career and personal life.*

As a member of a military/law enforcement family, I was a criminal justice junkie and earned my college degree in justice and policy studies. Criminal law was the only area of law I considered when I decided to go paralegal school. However, the 1994 NCPA Spring Seminar I attended and the publications I received through the NCPA helped me understand the diversity and complexity of the paralegal profession. For the first time, I became interested in other areas of law.

The \$150 scholarship I received from the NCPA was only part of my second place prize in the 1994 student essay contest. The one-year membership to NCPA and paid registration to the Spring Seminar and Annual Meeting provided a complete introduction to the paralegal profession and helped me get the most out of my education at the American Institute of Paralegal Studies (AIPS). Without the essay contest being publicized through AIPS, I would not have known about NCPA, and would not have attended that first seminar. Although some of the NCPA sessions were "over my head" (well, okay, some of them STILL are!), as I attended the sessions, I was very amazed at how much variety the paralegal profession offered.

At the time I won the scholarship, I was working full-time in an entry-level job (for entry-level pay), attending school several nights a week and making payments on my college loans. For those reasons, the financial boost I received from the scholarship was truly significant to me. Beyond the financial reward, however, I received a boost to my confidence, the recognition it brought me within my paralegal program and better yet, a broader exposure to the paralegal profession.

The NCPA is not strictly about work - I learned skills at my first seminar that I have tried to use at every NCPA seminar: be ready to meet great people and make new friends, bring a big bag for handouts and goodies and come hungry - there is always plenty of good food, thanks to the generous sponsors of NCPA events.

After six years as a criminal law paralegal and two years in general civil litigation, I just marked my second anniversary as a family law paralegal with Wyatt, Early, Harris, Wheeler, LLP in High Point. Because all families are complex, diverse and have a variety of legal needs, I have also been able to learn about real estate, business, bankruptcy and estate law. As I discovered at my first NCPA seminar, the learning never stops and it can be fun too!

## *NC State Bar News*

**As reported by Blanche S. Berkowitz**



On April 15, 2005, the North Carolina State Bar Council adopted 2005 Formal Ethics Opinion 2, which rules that a law firm that employs a nonlawyer to represent Social Security claimants must disclose such to prospective clients and in any advertising for this service.

In addition, on April 15, 2005, the Ethics Committee of the North Carolina State Bar agreed that the subcommittee should continue the study of the proposed 2004 FEO 12, *Hiring an Independent Title Search Company*. This proposed opinion would impact the use of paralegals performing public record searches and the title companies that employ them.

**The North Carolina Board of Paralegal Certification approved NCPA's 25th Annual Meeting and Seminar, held March 11-12, 2005 in Wrightsville Beach, for the following Continuing Paralegal Education (CPE) credits: 6.0 CPE general credits and 1.0 Professional Responsibility credit.**

# 2nd Vice President's Report Membership



**Brenda Mareski, CP**

The current membership breakdown is as follows (New members reported from April 7, 2005 through July 15, 2005):

General members:	343
Associate members:	42
Student members:	63
Affiliate members:	2
Sustaining members:	2
Educational Program members:	2
<b>Total</b>	<b>454</b>

NCPA sends a warm welcome to our newest (G)eneral, (A)ssociate, and (S)tudent members who are as follows:

Jean Foust Allen, (G); Marilyn S. Bartlett, (G); Amy R. Crowder (G); Melissa Gillen, (S); Amanda Walding Harmon, (G); Judy M. Hill, (G); Robin Smith Hill, (G); Nichole D. Hutchins, (S); Lakesha Lassiter-Holley (S); Shawn L. Leisey, (G); Jennifer A. Roediger, (G); Tracy L. Spruill, (G)

We also welcome our newest Educational Program member, Guilford Technical Community College.

NCPA is proud to recognize the following Sustaining members. We thank them for their generous support!



NCPA is also pleased to recognize our Affiliate members, Alamance County Paralegal Association, Guilford Paralegal Association, and our Educational Program Members, Caldwell Community College and Guilford Technical Community College.

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# Ethics Corner

## Nonlawyer Conflict of Interest

Blanche S. Berkowitz, Ethics Chairperson



Trust Us Law Firm represents client Joe Paluga, plaintiff in a case against defendant Harry Hothead, represented by the Sue Them Law Firm. Polly Paralegal worked as a paralegal at the Sue Them Law Firm during the time this law suit commenced and was familiar with the case and the parties, although she worked on many other cases and matters while at that firm. Polly left the Sue Them Law Firm and was hired by the Trust Us Law Firm.

### What are the ethical ramifications of such a scenario?

#### The Paralegal's Obligation

Canon 3 of NALA's Model Standards and Guidelines for Utilization of Legal Assistants states, "A legal assistant must not engage in conduct or take any action which would assist or involve the attorney in a violation of professional ethics or give the appearance of professional impropriety."

Canon 8 of the NFPA (Model Code) states "[A] paralegal shall avoid conflicts of interest and shall disclose any possible conflict to the employer or client, as well as to the prospective employers or clients."

Paralegals are exposed to confidential client information, case strategies and other privileged information, and it is the paralegal's ethical obligation to disclose any situation in which a conflict of interest exists due to prior employment or any other basis, which may compromise a client's best interests in a case. Many law firms screen for conflicts at the time that the firm makes an offer of employment to the paralegal in order to provide the paralegal with adequate disclosure opportunity for any conflict of interest.

Paralegals are prohibited from working on any matter in which there may be any possible conflict or prior knowledge of the case and parties. It is the paralegal's obligation to allow his or her firm to create what is known as an "ethical wall," a "cone of silence," a "screen" or formerly described as a "Chinese Wall" around the paralegal with regards to any case in which a conflict of interest may exist.

An ethical wall may be implemented around a particular paralegal as follows:

- prohibit the paralegal from having any connection with the matter;
- prohibit discussions with or the transfer of documents to or from the paralegal;
- restrict access to files (paper and computer) and clearly label files with the restrictions; and
- educate all members of the firm regarding the isolation of the paralegal from the case.

Some firms obtain consent from the affected clients so as not to risk disqualification from a case.

#### The Lawyer's Responsibility

There are ethical obligations that lawyers must adhere to when paralegals are newly hired or when they depart. As stated

above, if a newly hired paralegal discloses a conflict of interest in a case due to prior employment, the law firm risks disqualification from the case if procedures are not put in place to isolate the new paralegal from the case. While the rules of imputed disqualification apply to lawyers, they do not apply to nonlawyers.

Recent state cases in California and Florida have specified the screening process around the newly hired paralegal and dictate that the lawyer must obtain the consent of either the prior law firm or client so as not to face disqualification. As a note, screening of a paralegal that has a conflict with a client's interest in a case was endorsed by the ABA in Informal Opinion 88-1521.

When paralegals depart from a firm, the ethical obligations of the supervising lawyer in the paralegal's former firm are to inform the departing paralegal of the ethical obligation not to disclose to the hiring firm any confidential information regarding the former firm's clients. The former law firm may decide to advise the hiring firm that the paralegal should be isolated from participating in any case in which the new and former firms are adverse counsel.

#### N.C. State Bar

Rules of Professional Conduct 74: "Opinion rules that a firm which employs a paralegal is not disqualified from representing an interest adverse to that of a party represented by the firm for which the paralegal previously worked."

Rules of Professional Conduct 176: "Opinion rules that a lawyer who employs a paralegal is not disqualified from representing a party whose interests are adverse to that of a party represented by a lawyer for whom the paralegal previously worked."

Guidelines for Use of Non-Lawyers in Rendering Legal Services - Adopted July 17, 1998: "Lawyers should make sure that their assistants clearly understand their professional and ethical responsibilities with respect to conflicts of interest. If a lawyer accepts a matter in which the assistant has a conflict of interest that does not affect or limit the lawyer's representation of the client, the lawyer should exclude the assistant from participation in the representation. RPC 176. Although the imputed disqualification rules in Rule 1.10 do not apply to non-lawyers, the attorney must take "extreme care to ensure" that the assistant is totally screened from participation in the case. Id. In addition, the lawyer should inform the client that a non-lawyer employee has a conflict of interest which, were it the lawyer's conflict, might prevent further representation of the client in connection with the matter. The nature of the conflict should be disclosed. No interest or loyalty of the assistant may be permitted to interfere with the lawyer's exercise of independent professional judgment."

#### Conclusion

The Trust Us Law Firm may hire and employ Polly Paralegal and continue representing Harry Hothead, but should take extreme care in totally screening Polly from participation in the case. It would also be advisable to obtain the consent of the Sue Them Law Firm and its adverse client.

## Sharon Robertson Re-Elected to National Post



Sharon G. Robertson, CLAS, an NCPA member who is a paralegal with the western office of North Carolina Prisoner Legal Services, Inc., has been elected to a second term as Director of Region II of the National Association of Legal Assistants.

She was installed July 15 during the association's 30th annual convention in Kansas City, MO. She will also serve on NALA's board of directors during the 2005-06 operational year.

Ms. Robertson has been a legal assistant since 1984 and has served as President and in a number of other leadership roles for NCPA. She is also a member of the Legal Assistants Divisions of the North Carolina Bar Association and North Carolina Academy of Trial Lawyers. She earned NALA's coveted Certified Legal Assistant credential in 1989 and achieved the CLA Specialty in civil litigation in 1994. She has twice received the NALA Affiliated Associations Affiliates Award (1998 and 2001) for her contributions to the paralegal profession.

She earned her Associate degree as a paralegal technician from Central Piedmont Community College in 1985, and has been an instructor in the Paralegal Program at Western Piedmont Community College, Morganton. She also has a BA degree in secondary education from the University of Arizona, Tucson.

Also elected to second terms at the annual meeting were: First Vice President—Tita Brewster, CLA, Las Cruces, NM; Second Vice President—Linda J. Wolf, CLAS, Dallas, TX; and Treasurer—Sharon A. Werner, CLA, Manchester, MI. These board members serve with Debra J. Monke, CLAS, Bloomington, IL, who was elected President by the NALA Board of Directors last February and officially took office at the annual meeting in Kansas City.

Other newly elected NALA region directors taking office at the annual meeting were: Olivia Roleson, CLAS, Memphis, TN, Region III, and Cassandra Oliver, CLA, Tulsa, OK, Region IV.

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## MEMBERSHIP

NCPA invites paralegals, paralegal students, attorneys, educators, paralegal associations and those related to the legal profession to become members. There are seven membership categories: General, Associate, Student, Patron, Sustaining, Affiliate and Paralegal Educational Program. Each membership category has its own requirements.

Learn more about the benefits of membership at [www.ncparalegal.org/membershipters.htm](http://www.ncparalegal.org/membershipters.htm), where you will also find applications for General, Associate and Student membership.

If you would like to speak with an NCPA representative, please contact the following individuals:

MEMBERSHIP TYPE	CONTACT	TELEPHONE	EMAIL
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Patron / Sustaining Membership	Chris Reeves, Patron / Sustaining Chair	919.682.9691	chris@pwkl.com
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Paralegal Educational Program Membership	Beverly King, Student/Schools Relations Chair	704.376.6574	bking@mrsmt.com

# NALA Affiliates Award



*"NALA and its affiliated associations are beneficiaries of many dedicated members. In each affiliate, there is a person who has worn many hats, who has been dependable and reliable, and who has given countless hours of their personal time to their affiliate. Through the tireless efforts of their members, NALA affiliated associations are providing quality continuing education, providing more networking opportunities and job banks, and they are working with state and local bar associations to bring recognition and credibility*

*to our profession. Although they don't ask for it, each one of these hard-working members deserves recognition."*

- Lisa Vander Weide, CLAS, 2004-2005 NALA Affiliated Associations Director

**The NCPA is proud to announce that Belinda A. Thomas, CLAS, NCPA Chairman, was recently presented with the prestigious NALA Affiliates Award. Ms. Thomas was also presented with a NALA "Make a Difference" award for her outstanding contributions to NALA. We wish to express our sincere appreciation for Ms. Thomas' contribution to the paralegal profession and to the NCPA. It is because of unselfish individuals such as Ms. Thomas, who actively seek to promote the NCPA's goals, that the paralegal profession in North Carolina has achieved the recognition that it currently enjoys. Ms. Thomas certainly provided the NCPA with numerous reasons to nominate her for the NALA Affiliates Award.**

**Belinda Ann Thomas, CLAS,** is the current Chairman of the Board of the North Carolina Paralegal Association, Inc., (NCPA) and is the immediate past-President, having been elected to the office of President the last two years. In 2002, prior to her election as President, she assumed a leadership position in NCPA as District IV Director and was elected Chairman of the Board. In addition to her regular duties of supervising the Directors, Officers and Committee Chairs as they conducted their day to day responsibilities, she answered inquiries received from the web site or headquarters; attended and reported on matters at the meetings, wrote reports and articles for the AMICUS and the NCPA FORUM, volunteered to assist in matters where needed and offered valuable input and opinions on issues and decisions facing NCPA.

An Alliance was formed four years ago to work on a Paralegal Profession Act. NCPA had a Regulation Task Force that represented our association; however Ms. Thomas tirelessly attended the many meetings and phone conferences as another presence for NCPA. In October 2004, Ms. Thomas was able to see the result of everyone's hard work when the

North Carolina Supreme Court approved the North Carolina State Bar Plan for Paralegal Certification.

In addition to her service as a leader of the paralegal profession, Ms. Thomas is an active speaker for the paralegal profession and in the legal community. She has lead several courses on family law and equitable distribution that have been hosted by bar associations and paralegal associations statewide.

During the last two years, in addition to her speaking engagements at the state level, she has become known on the national level. In July 2003, Ms. Thomas attended the National Association of Legal Assistants ("NALA") Convention in San Antonio, Texas and co-presented an affiliated members presentation on the importance of long range planning for associations. In 2004, she submitted a member exchange proposal, "Managing the Equitable Distribution Case in the Family Law Practice" to NALA, which was accepted and presented during the NALA convention in Reno, Nevada, in July 2004. It was such a success that in September 2004, Ms. Thomas was one of the first faculty members for NALA Campus Live! and she also gave this presentation at NCPA's Annual Seminar in March 2005.

She certainly went beyond the call of duty as President of NCPA for the last two years. Now as the 2005-2006 fiscal year has begun, in addition to her appointment as Chairman of the Board, she also agreed to serve as Co-Chair for the Mid-Year Seminar for NCPA. Ms. Thomas has served in many capacities for NCPA including Second Vice President and CLA Review Course Chair.

Ms. Thomas was the "force" behind the forming of the

Alamance County Paralegal Association. She is still an active member of the Alamance County Paralegal Association (ACPA), currently serving as Secretary and Bar Liaison. She has served as its President, First Vice President and Second Vice President - ACPA is an affiliated member of NCPA that meets monthly and has approximately 15 members.

Ms. Thomas is also a member of the Legal Assistants Division of the North Carolina Bar Association. She was recently appointed to NALA's Certifying Board for the CLA/CP exam for a three-year term.

Ms. Thomas is a family law paralegal with the law firm of Vernon, Vernon, Wooten, Brown, Andrews & Garrett, P.A. in Burlington, North Carolina. A native North Carolinian, Ms. Thomas is a graduate of Liberty Bible Institute in Lynchburg, Virginia and is currently a student at Elon University in Elon, North Carolina. She received a Legal Assistant Diploma from Thompson Learning Center. Ms. Thomas attained the Certified Legal Assistant designation in 1994 and earned the Civil Litigation Specialist credential in 1996.

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# *Unusual Perks of Employment Better Than a Disney World Ride*

Submitted by **Trudy Rutherford**

In grateful remembrance of my boss, Carl A. Barrington, Jr., who passed away in March of 2005, I wish to share with the Forum readers a once-in-a-life-time experience that I encountered in the course of my employment. It came my way, in part due to my boss' close connection with the Fort Bragg JAG office and my boss' wife's reluctance to participate. Mrs. Barrington deferred the opportunity to me and I gladly accepted.

On July 16th, 2002, I had the opportunity to observe "our" 82nd Airborne and Pope Air Force personnel during their Joint Readiness Training Exercise, an event I will never forget. From now on, it will not bother me as much when our government needs more tax funds for the defense of our country because I have seen, first hand, what the funds are spent on.

An invitation by the Acting Commander, Major General Zannie Smith, promised a display of the joint services' war fighting capabilities. It was an impressive display which impressed me beyond applicable adjectives. It was quite apparent that a great deal of planning and practice had preceded the war fighting exercise because, in my opinion, it went off flawless.

The big event began around 16:45 when we boarded buses for the ride to Pope Air Force Base. We were handed an itinerary and a souvenir 82nd ABN baseball cap. The buses had a blue-light military police escort to usher us onto the base. On the base, we were greeted as we entered the auditorium for a slide presentation and question and answer session. Thereafter, we walked to the packing shed where each of the invited was paired up with an Airborne buddy. My buddy was a young Private from Ohio named Shawn Smith. He was very polite and attentive.

We were given a demonstration of the futuristic soldier who had enough hardware and electronics strapped to his body to make James Bond green with envy. Next, a squad leader and his eight men demonstrated their weapons and the capabilities of each weapon. From there, we went to get our gear strapped on for the group picture in front of a C-130. Private Shawn Smith was of great assistance in the undertaking of putting on the parachute, the reserve chute, the rucksack and helmet. Thus equipped, walking onto the flight line to the plane was a bit of a challenge, but definitely worth it.

After the photo-op, we went back to the pack shed, only this time, my Airborne buddy carried all the equipment. He handed me a Commander's coin, on behalf of the 82nd Airborne Division. I am told receiving a Commander's coin is a really big deal. Then, goggles, earplugs and sickness bags were passed out for our forthcoming trip on the C-130. On this day, the plane was boarded by civilians and paratroopers. The troopers, including some female troopers, were going to jump onto Sicily Drop Zone. Boarding the plane via the rear ramp, it felt like we were entering a pre-heated oven. It seemed like forever before we took off for the drop zone.

Over the drop zone, the door was raised and, after numerous safety checks, the paratroopers exited the door.

The pilot made another pass and then landed on the drop zone. We disembarked and were directed toward a huge tent. Next to the tent's entrance, a portable washbasin was set up where we were able to wash our hands. Then came the surprise, the tent was air-conditioned and the tables inside were elegantly set for dinner.

At the tent, a new Airborne buddy was ready for each group of guests at a table. For our table it was PFC Santiago. He follows in the footsteps of his father and grandfather by aiming to become a career soldier and attaining the rank of Sergeant Major. I have no doubt that he will reach his goal, because it was obvious that he has the right stuff to make it. He is so gong-ho Army. I wish that we could clone him for the Army's future.

A chilling moment came when the General, during a brief speech, mentioned that it was very likely that many of the military men around us would be heading to Afghanistan in the next week. May God protect them when they leave. Another slide presentation illustrated the plan of action for upcoming missions and what the joint forces would be bringing to the fight. I am very glad that there are Americans who are willing to do this job for the money that we pay them.

Around dessert time, we were treated to musical entertainment by the 82nd Airborne Chorus. This was a real treat. After the chorus' departure, we were given night vision goggles and were shown how to use them. For a quick test, all lights in the tent were turned off and it was pitch dark. With the night vision goggles we were able to see everything, albeit in Kermit the Frog green. We would need the night vision equipment for our next activity on the itinerary: the night assault exercise. Apparently, and for good reason, "We own the night" has become a popular saying, as we soon found out.

We boarded trucks that took us out onto the drop zone where we observed heavy equipment being dropped from numerous aircrafts. Then came the C-17s, the big, modern "brothers" of the C-130s. Within minutes, approximately 600 paratroopers were in the night sky, drifting to the ground where they were to take up their positions. The objective was to "take out" an enemy encampment with artillery bunkers. For the artillery assault portion, the trucks transported us south to the Sicily Drop Zone. Watching the fire power that followed was quite a show. It made me glad not to be an enemy of the United States.

It was nearly midnight when the buses delivered us to the parking lot on Fort Bragg, where our own vehicles were parked. The Protocol staff had a parting gift for us there, namely an 8x10 color group photo. This was truly an eye-opening, exciting experience. I am grateful to my boss for providing the opportunity and to all involved who made it happen, a BIG THANK YOU.

## Becoming a Great Listener

Submitted by Stephanie Elliott-Park

Being a paralegal requires a lot more than just a basic knowledge of the law, how an office runs or even how to type. In our line of work, we find ourselves often doing other tasks such as being an investigator, for example. When discovery is due and we only have "piecemeal" answers, we must dig deeper and press harder to get the answers that we know are needed to complete the task. We often get so caught up in the bigger goal, that we can miss the most simple and rewarding things that happen to us in our daily environments. There is so much to learn by taking a step back and examining what makes us great at what we do.

It struck me today as I was interviewing a client that we often mean much more to people than we realize. Before me sat a woman who had drug abuse problems since an early adult age and who was so nervous that she was reduced to tears by questions that I had been appalled that she could not answer over the phone. "Yes," I told her, "everyone has a past and skeletons in their closets." "Yes, everyone has their own uphill battles." What I really wanted to say was "STOP CRYING, these are JUST interrogatories. Boy, if you can not handle this, you will be a mess during your deposition next month." My goal at that moment was to get her to refocus and get only the facts out of her, not another couple of hour's worth of narration on just how hard her life has been since the events that lead to her to the current litigation. "Just the facts, lady," I thought. I had a deadline and she wasn't going to get in the way of it.

As I continued to listen to her story, a huge wave of guilt started to flush over me. She doesn't have a legal education, so of course she did not know how to answer the discovery requests I sent to her. It was my selfishness and determination to "get it done" that had blinded me to these facts. As I passed her the tissue box, I listened to this woman tell me her story and eureka hit me. Exactly—LISTEN!! No one has really "listened" to her. She has met with the attorneys, and they have heard the facts, composed and filed a Complaint, but they did not really listen. She has talked to her family about her situation, but they were so wrapped up in her pain, they did not really listen. She has visited her family physician and he has prescribed anxiety medication, but he is so concentrated on her patient care and his daily schedule that he probably did not really listen either.

I immediately felt my wall coming down, the one I built around myself because I had felt better than this woman. I had been impatient, when I needed to be soft-spoken and kind. I had been appalled at having to explain what exactly a "witness statement" meant, when I should have patiently explained it in every way necessary, until she finally understood.

Being a great paralegal means so much more than just having a working knowledge of how to get your job done in the most efficient manner possible. In this instance, with a woman who at first glance I have absolutely nothing in common with, I learned a valuable life lesson. She is a human being who really just needed me to listen, and so finally I did.

*Stephanie Elliott-Park is a litigation paralegal for the law firm of Gray, Layton, Kersb, Solomon, Sigmon, Furr & Smith, P.A., in Gastonia, NC. She has worked as a paralegal for 5 years (having worked in the legal field for over ten years) and is currently studying to take the CLA exam.*

## Statewide News & Seminars

The Asheville Area Paralegal Association will be hosting an ethics seminar. Attorney Susan Russo will present a three hour ethics seminar on September 9, 2005 beginning at 1:00 p.m. The seminar will focus on confidentiality, avoiding conflicts of interest, competence and diligence, and the unauthorized practice of law. The seminar will be held at South College in Asheville. For more information, please contact Beth Stallings, AAPA President at bstallings@aapaonline.net or 828-254-8800 x 384.

The Greensboro Paralegal Association, an affiliate member of NCPA, has changed its name to Guilford Paralegal Association and has changed its meetings from daytime to 6:30 p.m. on the second Tuesday of each month. For more information on the Guilford Paralegal Association, please contact Debbie Beeler dbeeler@MACCORDMASON.com.

Lawyers Mutual is offering a new FREE continuing professional education (CPE) seminar designed exclusively for paralegals. The program, co-sponsored by Investors Title Insurance Co., will be offered on Thursday afternoons in Raleigh, Durham and Charlotte in September, October and December and is designed exclusively for the real estate paralegal. If you have any questions about this program, or would like to work with Lawyers Mutual to sponsor a program in your area, please contact the Risk Management Department at 1-800-662-8843 or email Diane Boyette at dboyette@lmlnc.com.

Those who attended NCPA's 25th Anniversary celebration in March were treated with a walk back into yesterday. They were also challenged to a walk into our future. Recently, another step in our history occurred - an ad in a recent issue of Lawyers Weekly, placed by The Barone Law Firm in Cornelius, NC, announced the employment of a new paralegal, Vickie Adams, and named Ms. Adams' prior law firm. Vickie Adams is an active NCPA member. Congratulations, Vickie! We all know paralegals can be on letterhead and can carry business cards, as long as we are designated as paralegals or legal assistants. However, the aforementioned advertisement is a new medium recognizing our profession.

Do you have a paralegal related event or news that you wish to include in the next issue of the Forum? Please email the Articles Editor at alison.foster@meineke.com for more information.

### Calling All Members!

**"I always pass on good advice. It is the only thing to do with it. It is never of any use to oneself."**

**-Oscar Wilde**

Please consider contributing to the next edition of the NCPA *Forum*. Not only do we want our association's publication to be informative and innovative for each and every member, we also want it to include helpful hints and sound advice from our main resources, our members. We are looking for all types of articles that relate to the paralegal community. Anything of interest to you will most likely be of interest to other paralegals across the state. Let your voice be heard in The Forum. Please submit all articles in Word format to alison.foster@meineke.com. You may also e-mail your comments, suggestions and possible article contributors to us as well.

**The North Carolina Paralegal Association, Inc. Wishes To Express Its Appreciation To Those Who Contributed To The 2005 Annual Seminar And Meeting Either As A Sustaining Member, Sponsor, Exhibitor Or Contributor.**

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# Advanced Paralegal Certification

## *The purposes of the CLA/CP Advanced Certification programs are to:*

- Provide first class continuing education courses for paralegals in various specialty areas.
- Provide a certification process to recognize those who have achieved the CLA/CP certification and successfully complete an advanced certification program in a specific practice area.

The CLA Specialty program began in 1982 with examinations for paralegals working in the areas of Civil Litigation and Probate and Estate Planning. In 1984, the Corporations/Business and Criminal Law and Procedure Examinations were offered. A Real Estate specialty examination was added in 1987, followed by Bankruptcy in 1992, and Intellectual Property in 1995. As of June 1, 2005, 1108 Certified Paralegals have received the CLAS credential.

The CLA Specialty Program is now entering a new phase to stay in step with the accelerating pace and evolving needs of the paralegal profession. A shift from the current written exam program to a curriculum based Internet learning and assessment process is the main transformation.

The transition to curriculum based certification is a slow and deliberate process involving dedicated individual and team effort by paralegals, subject experts, and technical experts. Recommended changes in the program were first introduced to paralegals at NALA's annual convention in July 2003. The presentation described the Paralegal Advanced Certification Board review and evaluation methodology, and explained the rationale behind the recommendations.

## **Why Change**

The paralegal work environment of today is entirely different than when the CLAS program was launched 20 years ago. Devising a program with curricula to meet the ever-sharpening professional focus now demanded by employers was a key element in the board's desire to re-tailor the specialty program. This aim is supported by consistent feedback from certified paralegals who have asked for more narrowly focused advanced certifications.

The Paralegal Advanced Certification Board also sought a program that would better serve CLA/CPs wishing to enter new areas of specialty practice areas, as well as those seeking advanced credentials in their current specialty areas. This recommendation was based on the observation that the current program is aimed at those who either have the experience to pass the exam in a certain area of law, or who are willing to undertake a grueling (and often indistinct) regimen of self study to achieve the required knowledge.

Logistical issues surrounding location and times of examinations were also addressed. The current four hour written exam given three times a year at locations nationwide require the inconvenience, or hardship, of travel for many who wish to earn advanced certification. A more "user friendly" means of qualifying for the CLAS was sought, without compromising the required level of expertise.

## **Program Criteria**

In order to meet the recommendations for more narrowly focused specialty areas and greater service to CLA/CPs who want to change areas of specialty practice, the Paralegal Advanced Certification Board set specific criteria to be met by the advanced program.

These include:

1. Participants must hold the CLA/CP credential to earn the advanced credential.
2. The program must be relevant to the workplace. Employers represented on the board emphasized that if employers were to support the new program, the current reality of narrow specialization, rather than broad areas of practice, must be reflected in the curriculum. In addition, the program description must clearly state the meaning of the advanced certification—that the individual paralegal has demonstrated specific knowledge in a specific area of law.
3. Defensible national standards must be maintained. The program must withstand evaluation by outside experts just as the CLA/CP examination and the current CLAS program have.
4. The program must be accessible and offered at reasonable cost.

## **When?**

The first specialty subject area in development for advanced certification is Contracts Administration and Management. The course is complete and actual implementation is expected before the end of 2005. Because the subject of contracts touches many areas of law, this is believed to be an excellent subject with which to begin.

Other specialty areas will be developed according to the needs of CLA/CPs. While the Paralegal Advanced Certification Board is considering a wide range of possibilities, each program will be designed to reflect work of paralegals in specific practice areas. The board will seek input from CLA/CPs and NALA members, it will review survey data and consider other information to determine specific specialty areas. Some areas under consideration are Personal Injury, Real Property/Land Use, Discovery, Business Organizations, Trademark Law, Patent Law, Elder Law, and Complex Litigation Management.

The current CLAS examination program will be phased out with the July 2005 examination session. More information about this progressive specialty program is available by contacting NALA Headquarters or checking the Web site.

## **For Current CLA Specialists**

As the new program grows, those with the CLAS credential will have the option to continue using the CLAS credential (as long as CLE requirements are met), or change to the new Advanced Paralegal Certification (APC) credential. Choosing the APC option will assist general recognition of the new credential and its meaning. It will also provide an alternative to those who have had difficulty using the term "Specialist." Some states do not permit use of this term by attorneys and thus the prohibition is extended to paralegals.

During the transition period of the programs, it is important to keep in mind that the new program is principally a change in the method by which paralegals may attain advanced certification. Those who have achieved advanced certification are encouraged to use the credential in the most advantageous way to inform others of their significant accomplishment—whether it is the CLAS or the new APC designation.

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## CALL TO ACTION: NOMINATIONS AND ELECTIONS

### **The Value of Service**

You have heard the old expression “What goes around, comes around.” If you value NCPA for the service it provides you, here is your chance to make the same meaningful contribution to the lives and careers of other paralegals. Consider serving as an officer or director in the 2006-2007 membership year. Not only will it give you insight into the workings of NCPA, but it will improve your leadership skills, broaden your network of important contacts and you might just have a lot of fun, too!

Following this article, you will find a “Declaration of Candidacy for Office” form and a “Recommendation for District Director” form for some districts. If you are interested in becoming more involved in NCPA, or know of someone who you believe would be good for the organization, please complete the appropriate form and return it to the address listed on the form. The deadline for returning the “Declaration of Candidacy for Office” form is **December 19, 2005**. The deadline for returning the “Recommendation for District Director” form is **January 4, 2006**.

Do you think you may be interested, but are not sure what these duties entail? Briefly, these are the duties of the Officers. Please refer to your Membership Directory to find references to the Bylaws and Standing Rules.

- President: Represents the needs and concerns of the membership before the Board of Directors, supervises the work of other Officers and Committee Chairmen, and keeps the membership advised. [See Bylaws Article VIII.1. and Standing Rule VIII.A.1.]
- First Vice President: Responsible for planning seminars, workshops and other educational events and is the Chairman of the Education Committee. [See Bylaws Article VIII.2. and Standing Rule VIII.A.2.]
- Second Vice President: Is the Chairman of the Membership Committee and is responsible for the compilation of the Membership Directory. [See Bylaws Article VIII.3. and Standing Rule VIII.A.3.]
- Secretary: Responsible for keeping a permanent record of all meetings of the membership. [See Bylaws Article VIII.4. and Standing Rule VIII.A.4.]
- Treasurer: Responsible for the deposit of funds and makes disbursements as provided for in the budget; is the Chairman of the Finance Committee and prepares the budget for the ensuing fiscal year to be approved by the Board of Directors. [See Bylaws Article VIII.5. and Standing Rule VIII.A.5.]
- NALA Liaison: Is a NALA member who is familiar with the NALA Bylaws and Standing Rules, represents NCPA at the NALA Annual Meeting of Affiliated Associations and makes quarterly reports to NALA concerning NCPA’s activities; coordinates with the CLA Review Course Subcommittee Chair on planning and presentation of CLA Review Course. [See Bylaws Article VIII.6. and Standing Rule VIII.A.7.]
- Parliamentarian: Attends all membership meetings and gives opinions on parliamentary procedure and interprets NCPA’s Bylaws and Standing Rules; is the Chairman of the Bylaws and Standing Rules Committee. [See Bylaws Article VIII.7. and Standing Rule VIII.A.6.]

For those district members who are electing new District Directors, a “Recommendation for District Director” form follows this article. Your Director, as a member of the NCPA Board of Directors, is responsible for the promotion of NCPA within his or her own district. This includes the recruitment of new members and assisting with the development of educational events within your district. [See Standing Rule IX.C.5.] This position gives you a great chance to network with other paralegals in your own geographic district and it gives you the opportunity to find out how other areas in North Carolina are educating and promoting paralegals in their districts. Please return the “Recommendation for District Director” form by **January 4, 2006**.

If you have any questions about any position, Officer or Director, please do not hesitate to contact Nominations & Elections Committee Chair Carmi Henderson at 704-374-7120 or [carmi.henderson@wachovia.com](mailto:carmi.henderson@wachovia.com), or contact one of the current NCPA Officers or Directors. Their names can be found in the front of your Membership Directory or the inside back cover of this issue of the NCPA Forum.

**DECLARATION OF CANDIDACY FOR THE OFFICE OF:**

\_\_\_\_\_  
**OF**  
**THE NORTH CAROLINA PARALEGAL ASSOCIATION, INC.**  
**2006-2007**

The undersigned hereby declares that he/she is actively employed as a Paralegal or Legal Assistant,; is legally competent to enter into contracts; and is currently a General Member in good standing of the North Carolina Paralegal Association, Inc., and has been so for at least one (1) year.

Qualifications for Office:

Having read and understood Articles VII and VIII of the Bylaws of the North Carolina Paralegal Association, Inc. pertaining to officers, I hereby declare myself a candidate for the office of \_\_\_\_\_, subject to election at the 2006 Annual Meeting of the Corporation.

Date: \_\_\_\_\_  
\_\_\_\_\_ (Print/Type Your Name)

\_\_\_\_\_  
(Sign Your Name)

My Address and Telephone Number:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

---

Mail to: Carmi H. Henderson  
NCPA Nominations and Elections Chair  
Wachovia  
Legal Division  
301 South College Street, NC 0630  
Charlotte, NC 28202  
704-374-7120 (phone)  
704-374-6204 (fax)  
carmi.henderson@wachovia.com

**RECOMMENDATION FOR DISTRICT DIRECTOR  
FOR DISTRICT \_\_\_\_\_ OF  
THE NORTH CAROLINA PARALEGAL ASSOCIATION, INC.**

Pursuant to the provisions of ARTICLE IX.3 and .5 of the Bylaws of the North Carolina Paralegal Association, Inc. and Section IX.C of the Standing Rules, the position of District Director for Districts I, III and V (one-year interim position), and II, IV, VI, and VIII (two-year term position), will be elected by the members of their respective regions and announced at the Annual Meeting in Atlantic Beach, North Carolina on March 30, 2006.

If you are a member of District I, II, III, IV, V, VI, or VIII and wish to nominate a candidate for the Directorship of your District, **please complete the following form and mail it, together with a letter from your nominee expressing his/her interest in the position and a copy of the nominee's resume**, in accordance with the following instructions.

***DEADLINE FOR RECEIPT BY ELECTIONS CHAIR IS JANUARY 4, 2006***

Mail to: Carmi H. Henderson  
NCPA Nominations and Elections Chair  
Wachovia  
Legal Division Mail Code: NC 0630  
301 South College Street,  
Charlotte, NC 28202  
704-374-7120 (phone)  
704-374-6204 (fax)  
carmi.henderson@wachovia.com

FROM: \_\_\_\_\_  
(Print/Type Your Name)

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

With his/her permission, I hereby recommend for election to the Board of Directors of the North Carolina Paralegal Association, Inc. as Director of District \_\_\_\_\_, subject to the provisions of Article IX of the Bylaws:

\_\_\_\_\_  
(Print/Type Name of NOMINEE)

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

Employment: \_\_\_\_\_

Telephone No.: \_\_\_\_\_

This will certify that I am a member in good standing and that my nominee is a General Member in good standing of the North Carolina Paralegal Association, Inc., and has been so for at least one year as of this day, is employed as a paralegal, and is a permanent resident of the State of North Carolina.

Dated: \_\_\_\_\_  
\_\_\_\_\_  
(Signature of Nominator)

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[www.ncparalegal.org](http://www.ncparalegal.org)  
for more information and  
registration forms.



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Send your old and new email addresses to:

[info@ncparalegal.org](mailto:info@ncparalegal.org)

## Websites Every Paralegal Should Know About

Submitted by Patricia F. Clapper, CLAS

**North Carolina Medical Board** - Information on North Carolina licensed physicians, physician assistants and nurse practitioners. If a public file exists, you can view the documents on this website. [www.ncmedboard.org](http://www.ncmedboard.org)

**Drugstore.com** - Search prescription drugs and check drug interactions. [www.drugstore.com/pharmacy](http://www.drugstore.com/pharmacy)

**Google™ Maps** - The best site for mapping an address or getting driving directions. In addition to the driving directions, get an aerial satellite view of the street. [www.maps.google.com](http://www.maps.google.com)

**Babel Fish Translator** - Translate text from one language to another. Simply type in or cut and paste into the translator window. <http://babelfish.altavista.com/translate.dyn>

**Social Security Traces** - Free search for deceased persons. You can obtain the deceased person's date of birth, date of death, last residence and SSN. <http://ssdi.rootsweb.com>



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Sandy can be reached at 828.258.6991 or at  
[scarter@roberts-stevens.com](mailto:scarter@roberts-stevens.com)



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# C A L E N D A R O F E V E N T S

## September 16, 2005

NCPA EC/Board Meeting in Greensboro, NC

## September 16-17, 2005

Mid-Year Seminar and CLA/CP Review Course in Greensboro, NC

## October 1, 2005

Application deadline for December CLA/CP Exam

## November 5, 2005

NCPA EC/Board Meeting in Burlington, NC

## December 2-3, 2005

CLA/CP Examination

## December 19, 2005

Deadline for submission of Declaration of Candidacy for Office

## January 4, 2006

Deadline for submission of Recommendation for District Director

## January 7, 2006

NCPA EC/Board Meeting by Teleconference

## January 15, 2006

Application deadline for March CLA/CP Exam

## January 31, 2006

Student Scholarship Essay Deadline

## March 24-25, 2006

CLA/CP Exam

## March 30 - April 1, 2006

NCPA's 26th Annual Meeting and Seminar in Atlantic Beach, NC

## STUDENT SCHOLARSHIPS SPONSORED BY NORTH CAROLINA PARALEGAL ASSOCIATION, INC.

The North Carolina Paralegal Association, Inc. ("NCPA") is sponsoring its annual Student Scholarship Program. Any paralegal student enrolled in a school in North Carolina that meets the Paralegal Educational Program membership requirements as written in NCPA's bylaws\* is eligible for the scholarship program. An essay competition will be the basis of the scholarship.

**Essay Topic:** "I have chosen to be a paralegal..."

**Essay Requirements:** The essays must be typed, double spaced, and on letter sized paper. They may not exceed two pages in length. Please be aware that spelling, grammar and punctuation will be taken into consideration. The essays will be judged anonymously, so do not reference your name or your paralegal program within the body of the essay.

**Essay Deadline:** JANUARY 31, 2006

**Essay Submission:** Submit your essay with a cover sheet containing your name, address, telephone number and the paralegal program you attend by January 31, 2006 to:

Student/School Relations Chair  
North Carolina Paralegal Association, Inc.  
Post Office Box 36264  
Charlotte, NC 28236-6264  
704-535-3363  
bkg6489@aol.com

<b>Awards:</b>	<b>First Place:</b>	<b>\$400.00</b>
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	<b>Fourth Place:</b>	<b>\$100.00</b>

**In addition to the scholarship, all awards include a one year, free student membership in NCPA and one free student registration to NCPA's 26th Annual Seminar and Meeting to be held March 30-April 1, 2006 in Atlantic Beach, NC.**

**Notification:**

All award recipients will be notified by March 1, 2006.

\*NCPA's bylaws can be found at: <http://www.ncparalegal.org/forms.htm>

# North Carolina Paralegal Association Contacts

<b>OFFICERS</b>				
President	Erin N. Burris, CP	Sony Ericsson	919.472.1201	erin.burris@sonyericsson.com
First Vice President (Education)	Melissa Stockley Jones, CLA	Smith Anderson, et al.	919.838.2015	mjones@smithlaw.com
Second Vice President (Membership)	Brenda Mareski, CP	Bank of America	704.543.6667	bmareski@carolina.rr.com
Secretary	Yolanda Nicole Smith, CP	Tharrington Smith, LLP	919.821.4711	ysmith@tharringtonsmith.com
Treasurer	April N. Ritter, CLA	Robinson, Bradshaw & Hinson	704.377.8143	aritter@rbh.com
Parliamentarian	Beverly S. Jones, CLA	Smith Moore LLP	336.378.5309	beverly.jones@smithmoorelaw.com
NALA Liaison	Darlene M. Patz, CP	McAngus Goudelock & Courie LLC	704.504.3457	dmp1002@carolina.rr.com
<b>DIRECTORS</b>				
Chairman & At Large Director	Belinda Ann Thomas, CLAS	Vernon, Vernon, et al.	336.227.8851	bat@vernonlaw.com
Secretary	Yolanda Nicole Smith, CP	Tharrington Smith, LLP	919.821.4711	ysmith@tharringtonsmith.com
District I – Please contact	Chairman Belinda Ann Thomas	Vernon, Vernon, et al.	336.227.8851	bat@vernonlaw.com
District II Director	Patricia F. Clapper, CLAS	Levine & Stewart	919.929.0386	lglduck@aol.com
District III Interim Director	Trudy Rutherford	Barrington & Jones Law Firm	910.485.5171	emr0128@aol.com
District IV Director	Teresa A. Stacey	Vernon, Vernon, et al.	336.227.8851	tas@vernonlaw.com
District V Interim Director	Alison Reynolds VanDyke	McGuire Woods, LLP	704.373.8061	avandyke@mcguirewoods.com
District VI Interim Director	Michele A. Tuttle, CLA	The Barrett Law Firm	336.354.0004	michele@barrettfirm.com
District VII Director	Marilyn Moran, CLA	Coward, Hicks & Siler, P.A.	828.586.2147	mmoran@chspa.com
District VIII – Please contact	Chairman Belinda Ann Thomas	Vernon, Vernon, et al.	336.227.8851	bat@vernonlaw.com
District IX Director	Beverly King	Mitchell Rallings, et al.	704.376.6574	bking@mrsmt.com
Affiliate Director	Ruth H. Goodman, CLA	Wishart, Norris, et al.	336.584.3388	ruth.goodman@wnhplaw.com
Bar Liaison	Sherry G. Vaughan, CLA	NC Electric Membership Corp.	919.875.3128	sherry.vaughan@ncemcs.com
Paralegal Educator	Susan H. McIntyre, JD	Carteret Community College	252.222.6230	shm@carteret.cc.nc.us
Attorney Advisors	Teresa M. Brenner, JD	Bank of America	704.386.4238	teresa.brenner@bankofamerica.com
	Wiley P. Wooten, JD	Vernon, Vernon, et al.	336.227.8851	wpw@vernonlaw.com
<b>COMMITTEE CHAIRS</b>				
Associations Network Chair	Ruth H. Goodman, CLA	Wishart, Norris, et al.	336.584.3388	ruth.goodman@wnhplaw.com
Audit Chair	Elizabeth B. Wilson, CLA	Knox, Brotherton, et al.	704.568.2005	e-wilson@carolina.rr.com
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NC Land Records Task Force Liaison	Teresa L. Bowling, CLAS	Manning Fulton & Skinner, PA	919.787.8880	bowling@manningfulton.com
Nominations and Elections Chair	Carmi H. Henderson	Wachovia Corporation	704.374.7120	carmi.henderson@wachovia.com
ProBono Chair	D. Grace Carter, CLA	Syngenta Corporation	919.541.8674	d_grace.carter@syngenta.com
State Bar Certification Liaison	Yolanda Nicole Smith, CP	Tharrington Smith, LLP	919.821.4711	ysmith@tharringtonsmith.com
Student/School Relations Chair	Beverly King	Mitchell Rallings, et al.	704.376.6574	bking@mrsmt.com
Survey Chairs	Therese A. Morin	Vernon, Vernon, et al.	336.227.8851	tam@vernonlaw.com
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<b>PUBLIC RELATIONS</b>				
Senior Editor	Laura C. Braswell	Little & Little, PLLC	919.856.0006	laurapcubillos@yahoo.com
Articles Editor	Alison E. Foster	Meineke Car Care Centers, Inc.	704.644.8132	alison.foster@meineke.com
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<b>EDUCATION</b>				
Annual Seminar Chairs	Patricia F. Clapper, CLAS	Levine & Stewart	919.929.0386	lglduck@aol.com
	Teresa Nichols Smith	Cranfill, Sumner & Hartzog, LLP	919.863.8767	tns@cshlaw.com
Mid-Year Seminar Chairs	Belinda Ann Thomas, CLAS	Vernon, Vernon, et al.	336.227.8851	bat@vernonlaw.com
	Ruth H. Goodman, CLA	Wishart, Norris, et al.	336.584.3388	ruth.goodman@wnhplaw.com
CLA Review Course Chair	Sarah C. Hutchins, CP	The Banks Law Firm, P.A.	919.474.9137	shutchins@bankslawfirm.com
Registration Chair	Kaye H. Summers, CLA	Pulley, Watson, et al.	919.682.9691	kaye@pwkl.com
Convention Coordinator	Sarah C. Hutchins, CP	The Banks Law Firm, P.A.	919.474.9137	shutchins@bankslawfirm.com
<b>NCPA COORDINATOR</b>				
NCPA Coordinator	Mary F. Haggerty, CLA	Grubb Properties, Inc.	704.372.5616 ext. 2105	mhaggerty@grubbproperties.com