



## Legal Staff Professionals of South Carolina



SPOTLIGHT

### ***What You Need to Know About Paralegal-Client Privilege and Client Confidentiality***

Whether you are an attorney or a paralegal, there are ethical obligations everyone must follow when dealing with clients. Obligations to client confidentiality extend to areas further than you may think (regardless of employment status). Most people are familiar with client confidentiality, particularly attorney-client privilege and its various clauses, which is to protect all confidential communications exchanged between a client and their lawyer.

While a paralegal is not a lawyer and is instead required to work under the supervision of a licensed attorney, there are still ethical obligations that must be followed by all legal professionals with regard to their dealings with clients and hold attorneys accountable for the conduct of their employees.

A paralegal may not establish an attorney-client relationship, provide legal advice, and advocate on behalf of clients in court, and lawyers should take steps to avoid putting their paralegals into difficult positions due to client demands, including putting policies in place to protect client information and provide training for paralegals regarding the importance of safeguarding client confidentiality.

#### **Client Confidentiality**

Legal client confidentiality is a cornerstone of the attorney-client relationship and a fundamental principle in the legal profession. It is a duty imposed on attorneys and legal professionals to safeguard the privacy and pro-

tect the rights of their clients. This confidentiality ensures that clients can communicate openly and honestly with their legal representatives, fostering trust and allowing for the effective pursuit of justice.

At its core, legal client confidentiality means that attorneys are ethically and often legally bound to keep all information shared by their clients confidential.

This includes not only information related to the case at hand but also personal and sensitive details. Whether discussing a criminal defense strategy, a divorce proceeding, or a business transaction, clients must feel comfortable sharing the facts, their thoughts, and concerns without fear of the information being disclosed to others.

#### **Legal and Ethical Foundations**

Legal client confidentiality finds its roots in both legal rules and ethical standards. While the specifics may vary by jurisdiction, the principle is universally recognized in the legal community.

#### **Exceptions to Confidentiality**

While confidentiality is sacrosanct, there are exceptions. Attorneys may breach confidentiality if they believe it is necessary to prevent a client from committing a future crime, to prevent harm to others, or if required by law or court order. However, even in these cases, attorneys are typically encouraged to disclose as little information as possible to achieve the necessary purpose.

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# President's Report

By: Traci B. Wolfe, PP  
2023-2024 President

In a few short weeks, 2023 will be a distant memory. I want to take a moment as we approach the end of my term as president to recognize our accomplishments and outline the course we will follow as we move forward as an association. We currently have 93 members. As we continue to grow our membership in South Carolina, I would like to encourage each of you to continue your professional development. Growth and success have also been accompanied by setbacks. It is with sadness that I announce Hilton Head Legal Staff Professionals have signed their petition to dissolve, and they will now become Members at Large (MALs). Although the chapter will be dissolved, the members of Hilton Head will still be very active and will continue to be an active part of this association.

Houston saw a strong showing from South Carolina this year. My sincere thanks go out to you for giving me the opportunity to attend the NALS Conference. There were so many wonderful speakers, great fellowship with other NALS pals, and we even attended a professional baseball game. Houston did not disappoint. I was also honored to be nominated and was the runner-up for the Award of Excellence. Congratulations to Nancy M. Gates, PP, PLS, no one deserves it more than you did!

Make sure to mark your calendars. We will have our Winter Meeting on January 20, 2024, at the Embassy Suites on Greystone Blvd. Rumor has it, there will be some fantastic speakers presenting. Additionally, our Annual Meeting will be in Orangeburg next year, April 20, 2024, and the committee has been working hard to ensure the best experience for our members.

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## Spotlight

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2023-2024 Editors:

Meredith Lazarski, ACP, SCCP  
Katherine R. Helms, PP, SCCP

## CHART YOUR COURSE





**President's Report continued**

**By: Traci B. Wolfe, PP**

**2023-2024 President**

Remember, as Legal Professionals, and NALS members we are called to engage, inspire, enhance and promote. Have you stayed on track with your course, or have you drifted away slightly. Do you know someone that could use a hand in reaching their destination? Take a moment to reach out to someone or encourage a co-worker. You will be glad you did!

Thank you for allowing me to lead this year. It has been an absolute honor charting this course with each of you, and I am excited to see where our adventure takes us.



## **What You Need to Know About Paralegal-Client Privilege and Client Confidentiality con't**

### **Building Trust**

Legal client confidentiality is pivotal in building trust between attorneys and clients. Without a secure environment in which to share their legal concerns, clients may withhold critical information that could affect the outcome of their case. This trust allows attorneys to provide the most effective representation possible, as they have all the necessary information at their disposal.

### **Protection Beyond the Legal Realm**

Confidentiality isn't just about protecting sensitive information within the legal realm; it also has broader societal implications. By preserving the privacy of client communications, legal client confidentiality encourages individuals to seek legal advice and assert their rights. This, in turn, contributes to a fair and just legal system where all parties have access to legal representation without fear of undue exposure.

### **Professional Responsibility and Accountability**

Attorneys take their responsibility for client confidentiality seriously. Breaching this trust can have severe consequences, including disciplinary action by legal ethics boards, professional disbarment, and legal liability. This underscores the importance placed on maintaining client confidentiality in the legal profession.

### **Client Confidentiality in the Digital Age**

In today's digital age, maintaining client confidentiality poses new challenges. Emails, cloud storage, and electronic communication can leave digital footprints that may be vulnerable to breaches. Attorneys must take extra precautions to protect electronic client information and ensure it is secure from unauthorized access.

The intent of the attorney-client privilege is to allow the client to feel comfortable telling their lawyer all the facts concerning the case without fear of repercussion.

### **Paralegal-Client privilege: An Extension of the Attorney-Client Privilege**

The attorney-client privilege and the corresponding ethical obligations of client confidentiality extend to the paralegal and all non-lawyers working on the case. Rule 5.3 of the Model Rules requires that attorneys who are partners in a firm, have comparable managerial authority, or have supervisory authority over paralegals and other legal staff "make reasonable efforts to ensure that the person's conduct is compatible with the professional obligations of the lawyer." Essentially what this means is that lawyers are responsible for non-lawyer ethical rule violations as long as they directed or approved the conduct, or in their capacity as partners or supervisors of the staff member, failed to take timely corrective action regarding the action.

In other words, paralegals must abide by client confidentiality on behalf on who they're being directed by.

Excerpts from:

One Legal, an InfoTrack Company

By: Jan Hill, Paralegal

September 13, 2023

**OFFICER &  
COMMITTEE  
REPORTS**

**President-Elect**  
**Meredith Lazarski, ACP, SCCP**

I missed you all at our summer meeting! I would like to thank those of you who reached out to me this past summer after my mother broke her hip. That you took the time to send get well wishes and caring thoughts to both my mother and me was truly, truly appreciated. She's on the road to recovery, walking now with just a cane (and only using that about half the time) and my family feels very blessed.

Thank you to LSPSC for allowing me the opportunity to attend NALS Annual Conference in Houston, Texas. Both our opening keynote speaker, Brett Busby of the Texas Supreme Court, and our closing keynote speaker, William Hopkins of Spencer Fane LLP, were excellent. As usual I decided that instead of following one particular education track, I was going to attend the sessions that sparked my interest. The topics ranged from Animal Lawyers Wear Capes: When the Law is a Superhero and Saves a Pet Owner and a Pet to the Texas Ranger Bicentennial to Emoji and eDiscovery: How to Mitigate Risky Business. The speakers were enthusiastic, and the topics were interesting.

During the Recognition Lunch we cheered on our very own Traci B. Wolfe, PP as a NALS Award of Excellence finalist. The award was ultimately presented to Nancy M. Gates, PP, PLS of Mississippi.

LSPSC Officer Visitation was a success! Thank you to all of you for sharing your thoughts on how to grow our local chapters and LSPSC. We also look forward to hearing about how you charted your course over the last year.

Many, many thanks to those who submitted nomination forms and to those who accepted LSPSC board positions and committee positions. I'll be reaching out after our winter meeting to fill the last of the committee openings. I look forward to working with you during the 2024-2025 year.

I look forward to seeing everyone at the LSPSC Winter Meeting in Columbia on Saturday, January 20<sup>th</sup>. I hope everyone has a happy, healthy and blessed holiday season!



**Functional Director of Certification/Education**  
**Ann Marie Minerva,**  
**PP-SC EP/P, SCCP**

Happy Thanksgiving, Merry Christmas and Happy New Year. By the time, everyone reads this we will be full swing into the holidays.

NALS Certification – they offer 21 Specialty Certification (SC) areas:

- Administrative Law
- Appellate Law
- Bankruptcy Law
- Business Law
- Civil Litigation
- Contract Law
- Corporate Law
- Criminal Law
- E-Discovery
- Elder Law
- Employment Law
- Estate Planning/Probate
- Family Law
- Immigration Law
- Insurance Law
- Intellectual Property
- Juvenile Law
- Law Office Management
- Personal Injury Law
- Real Estate Law
- Trial Management

If you are a PLS you have the opportunity to change your certification from PLS to CLP [Certified Legal Professional]. You can either do it now or you can wait until you recertify. If you want more information regarding this designation change, please contact the NALS Resource Center.

The current Certification are: ALP's 1; CLP/PLS's 13; PP's 13; SCCP's 13; and SC's 2 .

I look forward to seeing everyone at our Winter meeting in Columbia.



**Functional Director of Membership/Marketing**  
**Cassandra Furtick**

**New Members:**

In today's ever-evolving landscape, the surge in membership signals a remarkable trend. From organizations to digital platforms, the allure of belonging to a community and reaping exclusive benefits has sparked a significant increase in membership numbers. Each new member brings with them a unique set of experiences, skills, and perspectives, enriching our community in ways we're excited to discover. Their diverse backgrounds and fresh insights are invaluable assets that contribute to the dynamic tapestry of our organization.

Join us in extending a warm and enthusiastic welcome to the latest additions to our vibrant community! It's with great pleasure that we introduce the newest members who have chosen to be part of our collective journey toward shared goals and experiences.

**WELCOME ALL NEW MEMBERS!!**

Let's ensure our new members feel right at home. Embracing them with open arms, offering guidance, and sharing our own experiences will play a pivotal role in their smooth integration into our community. Your warmth and support will undoubtedly make their transition a seamless and enjoyable one. I encourage all new members to reach out to your local and state boards and get involved in committees.

**A SOLID GROUP**

In the tapestry of our community, there exist pillars of strength and wisdom—members whose presence and contributions have woven the very fabric of our shared journey. As we acknowledge the invaluable commitment and enduring support of these members, we take a moment to celebrate their unwavering dedication that has been a cornerstone of our community's growth and evolution. As our membership continues to grow, we also wanted to share some fun facts about members. Stayed tuned to our social media for more “7 Fun Facts” about our members across the state!



Traci Wolfe, PP

If you were a animal, what would you be? Tiger

What's your go-to karaoke song? Gypsy, tramps and thieves

If you could travel anywhere in the world right now, where would you go? Egypt

What's the best piece of advice you've ever received? A great boss is better than any amount of money.

What's your worst childhood memory? Losing my mom at the age of 10

If you could only eat one food for the rest of your life, what would it be? Ice cream

What's the most interesting thing on your bucket list? Climb a volcano!



Cristy Marshall-Bradley

If you were a animal, what would you be? SASQUATCH

What's your go-to karaoke song? MARTINA MCBRIDE- WITH A BROKEN WING

If you could travel anywhere in the world right now, where would you go? COTTESLOE BEACH, PERTH AUSTRALIA

What's the best piece of advice you've ever received? CONTROL YOUR THOUGHTS AND RESPOND SLOWLY.

What's your worst childhood memory? THE DEATH OF MY FATHER

If you could only eat one food for the rest of your life, what would it be? PIZZA HUT PIZZA

What's the most interesting thing on your bucket list? WIN THE LOTTERY

**MARKETING TOMORROW'S FUTURE**

In the dynamic realm of community and organizational growth, the fusion of marketing strategies with membership initiatives stands as a powerful catalyst for fostering engagement, building connections, and driving collective progress. The synergy between marketing and membership not only fuels the expansion of communities but also lays the groundwork for establishing enduring relationships and delivering value to every member. As we look back over these last few months, we explored the ways of improving

our technology and using that to market our organization. I share great pride in seeing all of our local chapters and members at large working together to market not only this organization but spread the knowledge they have as well. Our seasoned members have not only been mentoring the “newbie” members but have charted the course for tomorrow’s future. Our new members are standing up and bringing youth knowledge to our community. I look forward to continuing to reach out to our community, our members, and the state to see how our organization can better serve the legal community. This includes our growing advancements in high schools across the state.



**Immediate Past-President/Parliamentarian**  
**Katherine R. Helms, PP, SCCP**

Congratulations to Maris D. Cannon, from Legal Staff Professionals of the Midlands (LSPM) Chapter, for earning her Professional Paralegal designation!

As some of you may know, our local chapter, Legal Staff Professionals of the Lowcountry (LSPL), has now been dissolved. Those local members are now Members at Large (MAL).

The NALS ALP Partner Program now includes 22 schools/legal programs from across the country. Over the academic year, 410 ALP exams (including retakes) were administered across 37 exam sessions. This program provides marketing and instructional support to participating schools and offers their students the opportunity to stand out from the crowd by earning a national credential that establishes their foundational legal skills and readiness for a legal support career. To find out more news, etc., from NALS, click here: <https://www.nals.org/page/OurAssociation>

We had 5 members attend this year’s National Legal Education Conference in Houston, TX. Our very own current president, Traci B. Wolfe, PP, was nominated for the NALS Award of Excellence. Although she did not come home with the prize, she was gracious in her concession. I hope to see you all at the 95<sup>th</sup> National Legal Education Conference on

October 13-15, 2024, in Portland, Oregon!

In the meantime, I look forward to seeing you all at the Winter Meeting in Columbia on January 20<sup>th</sup>. (I’m still working on edits to the Handbook.)



**Award of Excellence**  
**Katherine R. Helms, PP, SCCP**

As Chairperson for the Award of Excellence, I will be distributing the approved 2024-2025 LSPSC Award of Excellence applications to our chapter presidents and Members at Large (MAL) on January 20, 2023. You can also find the application on pages 11 & 12 of this edition of *Spotlight*. The deadline to submit your 2024-2025 LSPSC Award of Excellence application will be March 1, 2024. Please be sure you get your nominations back to me by then. The Award of Excellence winner will be announced at the banquet on April 20, 2024!



**Annual Meeting Committee**  
**Sonia L. Hunt, Mikki Hancock, PP, SCCP,**  
**and Keisha Shuler-Johnson**

Annual Meeting will be held at the Holiday Inn in Santee, SC, April 19-21, 2023. We will be distributing Vendor Information, Sponsor Information and Ad information and hopefully registration information at the January meeting in Columbia. We will also have the hotel link available for you to be able to book your rooms.





**Community Projects Committee**  
**Victoria Mayfield**

LSPSC would like to extend a huge thank you to everyone who donated to the William J. McCord Treatment Facility/The Dawn Center at our 2023 Summer Membership Meeting. We appreciate the generosity shown by all of our members.

The Legal Staff Professionals of Greenville have chosen Switch as their charity for our 2024 Winter Membership Meeting.

Switch is a grassroots organization leading the movement to end sex trafficking and sexual exploitation at home in the upstate of South Carolina. The mission of Switch is to “rescue our brothers and sisters enslaved in sex trafficking and sexual exploitation by bringing the eternal light of God into this darkness. Through community awareness, teaching prevention, eliminating demand, providing intervention, and empowering restoration, we will drive this evil out of our cities.”

Please consider the list of current needs for Switch. Please be sure to donate to this wonderful cause before, or at our 2024 Winter Membership Meeting. Any monetary donations will also be accepted. By donating to this charity, you could be funding recovery homes for victims, helping in demand reduction by funding the men that are intercepting sex buyers, helping victims achieve their dreams after escaping sex trafficking, and spreading awareness and education about sex trafficking.

If you have any questions or if you would like for Legal Staff Professionals of South Carolina to highlight a community service or charity, please reach out to me by e-mail at [vjmayfield1@gmail.com](mailto:vjmayfield1@gmail.com).



**Employment Committee**  
**Sonia L. Hunt**

Members have been posting positions on Facebook pages. Let’s keep flooding these group pages with these positions to help get the word out to those who are looking for a position. If you see something that has not been shared to all Facebook pages, please let me know so that I can get it shared.



**Finance Committee**  
**Mikki Hancock, PP, SCCP, Debra Bailey, CLP**  
**and Angel Reid, PP, SCCP**

Ring in 2024 with LSPSC! To recap our summer meeting, we raised over \$400 with “Summer Luau!” Colleen Qunell was the big winner at the meeting, winning the door prize provided by Legal Eagle, the coveted pound cake made by Sonia Hunt, and the premium prize provided by the Orangeburg Chapter. Congratulations (and groans) to Colleen! We are sincerely happy for you.

Our Winter Membership meeting is scheduled for January 20, 2024, at Embassy Suites on Greystone Blvd, Columbia, SC.

The theme for the winter auction is “Cozy Winter Night.” Ideas for items to bring are: books, games, candles, fuzzy slippers, comfy throw blankets, hot chocolate mixes, and so much more. Make plans now to attend the Winter Membership Meeting, and we will see you there!





**Handbook Committee**  
**Susan L. Olmstead, PLS**

Seasons change as do we. Please reach out to me if you have a change of contact information: [suanolmstead369@gmail.com](mailto:suanolmstead369@gmail.com)/[susan@goingward.com](mailto:susan@goingward.com) or text me at 843-338-3313. The handbook is available on the LSPSC website. One change to note is that the Hilton Head chapter has dissolved but their members will continue as members-at-large.



**NALS Foundation Committee**  
**Matthew James**

First and foremost, I want to express my sincere congratulations to those who had the opportunity to attend the national conference. I am thrilled to hear that you had an incredible time and made lasting memories. While I can't help but feel a tinge of jealousy, I am genuinely glad that everyone had such a positive experience.

For those who filled out the nomination forms, thank you for your active engagement. Your commitment and willingness to represent South Carolina on the national level are commendable. Let us eagerly anticipate the outcomes and support our fellow members who accept the nominations. Having someone from our state at on the national level is a remarkable achievement, and we should all take pride in their representation.

Looking ahead, I am thrilled to announce the 2024 Chapter Leadership Development sessions organized by NALS. These sessions are designed to empower and cultivate leaders within our chapter, providing valuable insights and fostering professional growth. By participating in these sessions, you will enhance your skills, expand your network, and contribute to the success of our organization. Here is the schedule of the 2024 Chapter Leadership Development sessions:

January 30, 2024 Topic: Emerging Leaders & Leader Succession Planning

February 27, 2024 Topic: Awards

March 26, 2024 Topic: Recruiting & Retaining Members

April 30, 2024 Topic: Best of 2023-24 & Plug for

Awards

May 28, 2024 Topic: Goal Setting & Yearly Planning

June 25, 2024 Topic: Education and Adding Fun

July 30, 2024 Topic: Event Canvas Design/Meeting Planning

August 27, 2024 Topic: Selling Sponsorships & Fundraising

September 24, 2024 Topic: Recruiting Members & Committee Volunteers & Involving MAL

October 29, 2024 Topic: Governance - Presidents

November 26, 2024 Topic: Marketing & Adding Fun

December 17, 2024 Topic: Q&A With the NALS Board

Make sure to mark these dates on your calendars and prioritize your attendance. Each session will provide valuable insights and opportunities for personal and professional development. Staying Updated: To stay informed about these sessions and access meeting links, I encourage you to visit the [nals.org/events/event\\_list.asp](http://nals.org/events/event_list.asp). This website will serve as a reliable source of information, keeping you up to date with the latest news and updates from NALS.

Finally, I want to express our heartfelt appreciation for your continued support. Your contributions and donations are vital to the success of our organization. They enable us to provide valuable resources, organize events, and foster a strong professional community. In conclusion, let us celebrate the recent national experiences, eagerly await the outcomes of the nominations and election, and prepare ourselves for the upcoming 2024 Chapter Leadership Development sessions.

Together, we will continue to grow, learn, and make a positive impact as the Legal Staff Professionals of South Carolina!

If you have any questions, please don't hesitate to call me at (864)-331-9609 or email me at [aeaglguy@gmail.com](mailto:aeaglguy@gmail.com). You can also send an email to the NALS Foundation chair at [foundation@nals.org](mailto:foundation@nals.org).

Please note: All donated items will be used for NALS Foundation fundraising purposes. This means that your donation may be allocated to special fundraising projects, and not necessarily in the sweepstakes auction. We appreciate your donations.



## **Scrapbook Committee**

**Stephanie Jones, PP SCCP, Jenny Leininger and Colleen Qunell**

The Legal Staff Professionals of South Carolina Scrapbook Committee needs your help!! Do you have pictures from local, state, or even national meetings? Do you have pictures from charity events, get-togethers, etc.? DO you have funny or touching anecdotes from local or state meetings? Send them to us! Pretty please!!

Do you have extra craft supplies (who doesn't) that you can donate? Do you have swag from any NALS events? Send them to us!! Pretty please!! With sugar on top!! Email pictures to: Stephanie Jones at [stephanie.jones7009@gmail.com](mailto:stephanie.jones7009@gmail.com) or Colleen Qunell at [colleenqunell@gmail.com](mailto:colleenqunell@gmail.com).

If you would like to donate craft/scrapbook supplies and/or swag, please bring them to the meeting or contact Stephanie or Colleen for their address.

And finally, are you artsy? Join the Committee!! If you are interested, please email any of the above committee members. We would love all help we can get!



## **Technology**

**Cassandra Furtick and Colleen Qunell**

We're thrilled to share some fantastic news regarding our website! As part of our ongoing commitment to enhancing your experience and providing the best service possible, we've been hard at work implementing several exciting updates and features.

**Enhanced User Interface:** We've revamped the website's design to provide a more intuitive and user-friendly experience. Navigating through the site is now smoother and more efficient, ensuring that you can access information and resources with ease.

**Members Only Section:** We've reviewed and made sure everyone was resent their activation link. If you still cannot access the website, please reach out to me.

**Monthly Tech Tips:** We have begun to implement monthly emails with technology tips. Please let me know if there is something specific you would like to learn. Be on the lookout for emails from Legal Staff Professionals of South Carolina with more technology tips each month.

In addition to the website, we are in the process of making our social media pages more interactive. If you aren't following us, please make sure to do so. Over the next few months, we will be sharing articles, giving shoutouts to our members, featuring some of the community service projects many of us are a part of, as well as sharing some important field related information.

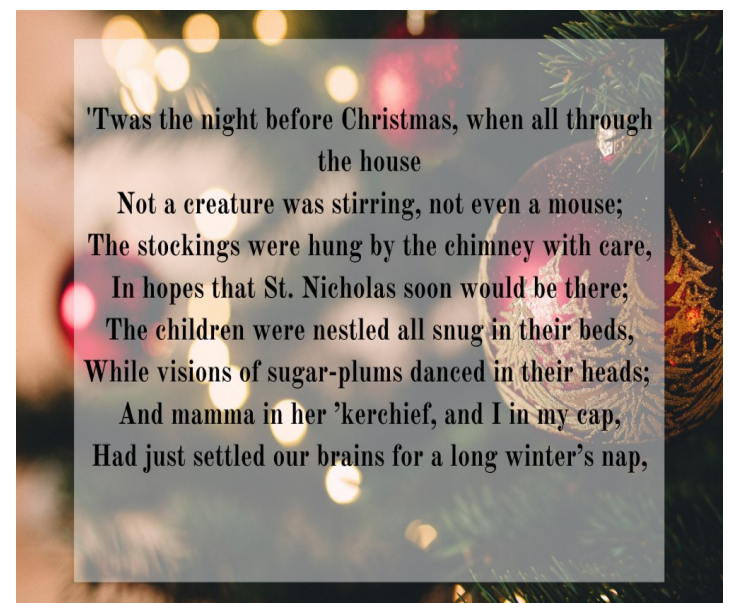
## **How to Get Involved**

Your feedback is invaluable to us. We want to hear from you! Share your thoughts, suggestions, and experiences using the website or any technology related topic. Your input will guide us in further refining and tailoring our platform to best suit your needs.

## **Stay Connected**

Stay tuned for more updates, announcements, and exciting content. Make sure to follow us on our social media channels and subscribe to members only section of the website to stay up to date with the latest developments and valuable information.

We are committed to providing you with the best possible experience using technology not only in the workplace, but in your personal life as well, and these updates are a testament to that commitment. Thank you for being a part of our community. Your support and participation are what drive us to continuously improve and innovate.



LEGAL STAFF PROFESSIONALS OF SOUTH CAROLINA  
NOMINATION FORM

## AWARD OF EXCELLENCE

**Eligibility Requirements:** Must be a member of the tri-level association  
Must be active in the legal profession in accordance with the By-laws and Standing Rules of LSPSC  
Must have a minimum of three years' service to a local chartered chapter, LSPSC, or NALS

**Deadline:** March 1, 2024

**Submit to:** Katherine R. Helms, PP, SCCP  
LSPSC Award of Excellence Chairperson  
1320 Richland Street  
Columbia, SC 29201  
Telephone: (803) 497-0129 (cell)  
E-mail: helmsdaka@aol.com

Nominee: \_\_\_\_\_ Home Phone: \_\_\_\_\_

Address: \_\_\_\_\_ Office Phone: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Local Chapter Affiliation: \_\_\_\_\_

Date: \_\_\_\_\_ Date Received by LSPSC Chairperson: \_\_\_\_\_

**Experience and Achievements (NALS, LSPSC and Local Chapter)**

A. Years of Experience in legal profession: \_\_\_\_\_

B. Years of membership in NALS: \_\_\_\_\_

C. List of elected or appointed positions held in a local chapter:

D. List all elected or appointed positions held in LSPSC:

E. List all elected or appointed positions held at the national level:

Professional Achievements (including years attained)

Professional Designations/Certifications:

Awards or recognitions received from any level of the tri-level organization:

Recommendation (250-word limit)

I believe the above-named person should be considered for the LSPSC Award of Excellence for the following reasons:

Signature: \_\_\_\_\_  
Name/Title: \_\_\_\_\_  
Firm Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Chapter: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Email: \_\_\_\_\_  
Date: \_\_\_\_\_

## NOTICE OF VACANCY (Nominations and Elections)

Dear Members:

In accordance with the Standing Rules of Legal Staff Professionals of South Carolina, adopted July 25, 2004 (last amended August 24, 2019), you are hereby noticed of the following vacant position for our 2024-2025 slate of State Officers:

### Treasurer

This means that all individuals nominated for this position declined their nomination. A call for nominations for this position will be taken from the floor at the Winter Membership Meeting scheduled for **Saturday, January 20, 2024**, in Columbia, South Carolina. Please consider the following qualifications if you plan to nominate an individual for this position:

### Treasurer

*Member in good standing for two years;*

*Served as an elected local officer for one year;*

*Attended at least one State Membership Meeting;*

*Attended State Annual Meeting of the date for call for nominations;*

*Active in local chapter;*

*Member-at-large, the member shall be considered active on the state level by attending at least two state meetings a fiscal year and chairing a committee.*

The positions of **President-Elect, Secretary, Functional Director of Certification and Education and Functional Director of Marketing and Membership** are expected to be filled by acclamation.

Please take note of this information.

2023-2024 Legal Staff Professionals of South Carolina Board



The following recommendation will be presented at the LSPSC Winter Membership Meeting on Saturday, January 20, 2024:

### **30-Days Notice to the Members of Legal Staff Professionals of South Carolina**

Upon approval by the Board of Directors, the following recommendation will be made to the membership of Legal Staff Professionals of South Carolina at its Winter Membership Meeting, January 20, 2024:

**Recommendation to waive the two years' service on the state board prior to the call for nominations requirement for the President-Election position.**

Please see referenced below LSPSC Bylaws, Article VII, Section 2 – Qualifications.

#### **ARTICLE VII OFFICERS/EXECUTIVE COMMITTEE**

**Section 2. Qualifications.** All officers must be members in good standing as defined in Article III, Section 2, Member in Good Standing Defined, at all times, including at the time of nomination and at the time of election. Where it might be necessary, a member may hold two offices, with the exception of president and president-elect, but will only have one vote. *A candidate for president-elect shall have served as an elected member of the board for at least two years prior to nomination. However, if circumstances exist which would make this qualification impracticable, then the requirement for two years' service may be waived.* All candidates for all state offices must be active in their local chapter, unless such candidate is a member-at-large.



**SLATE OF OFFICERS**  
**Legal Staff Professionals of South Carolina**  
**2024-2025**

ELECTED OFFICE	NOMINEE/CANDIDATE	NOTE
President	MEREDITH LAZARSKI, ACP SCCP	Acclamation
President-Elect	CASSANDRA M. FURTICK	Acclamation
Treasurer	OPEN	Expecting nomination from the floor at Winter Meeting
Secretary	STEPHANIE A. JONES, PP SCCP	Acclamation
F.D. – Membership/Marketing	MIKKI HANCOCK, PP SCCP	Acclamation
F.D. – Certification/Education	TERRI J. COKER, ACP SCCP	Acclamation



# Notice To All Members Winter Meeting

## **NOTICE TO ALL MEMBERS OF LEGAL STAFF PROFESSIONALS OF SOUTH CAROLINA**

**NOTICE is hereby given that the Winter Membership Meeting for 2023-2024 will be held on Saturday, January 20, 2024, at 1:45 p.m.**

**AT:  
Embassy Suites by Hilton Columbia  
200 Stoneridge Drive  
Columbia, South Carolina 29210  
(Dress is business attire.)**

**(Exact meeting information is available on the agenda/registration forms.)**

**Legal Staff Professionals of South Carolina**

**By: \_\_\_\_\_ /s/ Stephanie A. Jones  
Stephanie A. Jones, PP, SCCP  
LSPSC Secretary 2023-2024**





*Legal Staff Professionals of South Carolina*  
**2024 WINTER MEETING REGISTRATION FORM**  
Saturday, January 20, 2024  
Hosted by Legal Staff Professionals of South Carolina  
Embassy Suites by Hilton Columbia  
200 Stoneridge Drive, Columbia, SC 29210

**Deadline for In-person Registration: Wednesday, January 10, 2024**

**NO REFUNDS After Wednesday, January 10, 2024**

**\*Late fee of \$10.00 will apply to any registration not postmarked by JANUARY 10<sup>th</sup> \***

**Deadline for Virtual Registration: Wednesday, January 17, 2024, 5:00 p.m.\***

**\*NOTE: Both payment AND registration form must be received by deadline.**

**REGISTER AND MAKE PAYMENT ONLINE AT: <https://lspsc.org/registration>**

**MEMBERSHIP MEETING**

**Saturday, January 20, 2024**

**Saturday Schedule**

8:45 a.m. – 9:00 a.m.	Registration
9:00 a.m. – 10:30 a.m.	Seminar
10:30 a.m. – 10:45 a.m.	Break
10:45 a.m. – 12:15 p.m.	Seminar
12:15 p.m. – 12:30 p.m.	Break
12:30 p.m. – 1:30 p.m.	Lunch
1:30 p.m. – 1:45 p.m.	Break
1:45 p.m. – 3:30 p.m.	Membership Meeting and Theme Auction

**(Full Registration Does Not Include CLE)**

**\_\_\_\_\_ \$45 Meeting Registration & Lunch      OR      \_\_\_\_\_ \$15 Membership Meeting Only**

**\_\_\_\_\_ IN-PERSON      OR      \_\_\_\_\_ VIRTUAL**

NAME: \_\_\_\_\_ CERTIFICATIONS: \_\_\_\_\_

PHONE #: \_\_\_\_\_ EMAIL: \_\_\_\_\_

Please make check payable to: *Legal Staff Professionals of South Carolina* and return completed form to:



**Scan. Pay. Go.**

**Tara Jean Brown, PP, CLP, SCCP - LSPSC Treasurer**  
c/o ChaceLaw Limited Company  
481 Garlington Rd., Ste A., Greenville SC 29615  
864-350-0937 – cell phone  
Tarajbrown@icloud.com- Email

*Legal Staff Professionals of South Carolina is an affiliate of NALS...the association for legal professionals – dedicated to enhancing the competencies and contributions of members to the legal services profession. Seminars qualify for a total of 3.00 CPE credits by the South Carolina Paralegal Certification Board.*

*Legal Staff Professionals of South Carolina*  
**2024 WINTER CLE REGISTRATION FORM**  
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**CONTINUING LEGAL EDUCATION**  
**Saturday, January 20, 2024**

**9:00 a.m. – 10:30 a.m. TOPIC: Investigation in Premise Liability – What Is That?**  
*How in the world would premise liability affect me?*  
**Speaker: Daquan S. Blyther, Esq.**

**10:45 a.m. – 12:15 p.m. TOPIC: Ethics – Who Is It For?**  
*Do you think ethical conduct is only for attorneys? How about that Supreme Court Code of Conduct?*  
**Speaker: Haley A. Hubbard, Esq.**

*Registration and attendance at the LSPSC seminars, meetings, events and other activities constitutes an agreement by the registrant and LSPSC to use and distribute (both now and in the future) the registrant’s image or voice in photographs, videotapes, electronic reproductions and audiotapes of such events and activities.*

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**I will be attending the following seminars:**

	<b><u>MEMBER</u></b>	<b><u>NON-MEMBER</u></b>	<b><u>VIRTUAL</u></b>
_____ <b>Premise Liability</b>	_____ \$20 for one CLE	_____ \$25 for one CLE	_____
_____ <b>Ethics</b>	_____ \$30 for both CLEs	_____ \$40 for both CLEs	_____
	TOTAL AMOUNT: \$ _____		

\*\*\*\*\*

NAME: \_\_\_\_\_ CERTIFICATIONS: \_\_\_\_\_

PHONE #: \_\_\_\_\_ EMAIL: \_\_\_\_\_

Please make check payable to: **Legal Staff Professionals of South Carolina** and return completed form to:



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 c/o Chace Law Limited Company  
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# Chapter Reports

## Legal Staff Professionals of the Midlands Stephanie A. Jones, PP, SCCP

We have had a great year at LSP Midlands! There have been new members joining the association and we could not be happier to see new faces! We have had some amazing CLEs, and I want to take a moment to highlight the Functional Director of Education, Morgan Rivers. She has been an amazing asset to the board this year and has kept the CLEs entertaining, informative, and organized. Our meetings have been so much fun with her involvement this year.

LSPM members have been busy in our work and in our community this season. Members joined residents at the Finlay House for their annual Thanksgiving meal and served them their dinner from Lizard's Thicket. It was a really great time and I appreciate everyone who attended to make their Thanksgiving special.

I am also super excited for our Holiday Dinner at Liberty's Tap Room and Grill on Tuesday, December 12, 2023. We are expecting a great turn-out with a lot of laughter, discussions, and fun to be had. While we don't have a meeting per se and there is no speaker for the December event, we are having an ornament exchange and ugly Christmas sweater contest. It will be so much fun.

The remainder of the year will be full of surprises for our members as well. The board has been working hard on creating new ideas and events for members to become involved in and get to know each other better. I don't want to spoil any secrets just yet, but there will be some exciting announcements for members in the future!



## Legal Staff Professionals of Greenville Tara Jean Brown, PP, PLS, SCCP

Merry Christmas from Greenville. Hard to believe that 2023 is gone. LSPG has been busy this year.

We have had many great speakers at our luncheons for June thru November. Our speaker for our June luncheon was Aaron Angell from Angell Maloney, LLC spoke to us about legal asset portals. In July our speaker was Chace Campbell, who spoke with us about Recent and Uncommon Cases. Jason Ward spoke with us in August on Support Staff roles in Bankruptcy. In August, a several of our members attended the LSPSC Summer Membership Meeting and CLE in Columbia. On August 11th we had a Game Night Social held at the Pit Stop. We had great attendance and fun was had by all. In September we had the privilege of Stephanie Jones, PP, SCCP and Cassandra Furtick, FD Membership and Marketing visit with us to share the message of "Charting Our Course". Our October speaker was Katie Deuben, General Counsel from World Acceptance who talked with us on The Cautionary Tale of Alex Murdaugh - A Look into Ethics Violations that destroyed a Legal Legacy. On October 13th, LSPG held a second Game Night membership social with a Halloween theme. Members came dressed in costume and fun, games, eating and socializing was had. Andrea Price came to speak with us in November on Claims in Equity vs. Actions at Law. In December we will have Oliver Lollis, the Executive Director from Switch speaking with us, as our 2024 Charity. During that luncheon we will also have our wrapped ornament exchange.

We are currently doing a canned food drive for the Local Food pantry. All donations are due by December 13, 2023, and will be delivered before the Christmas holiday.

LSPG is hosting a From the Bench CLE on January 26, 2024, to be held at Southern First Bank Center on Verde Blvd. The CLE will be from 9:00 am to 4:00 pm. We are hoping for a great turn out.

See you at the Winter Membership meeting in Columbia in January. Until then, LSPG wishes everyone a safe and Merry Christmas. Happy New Year.

## Hilton Head Legal Staff Professionals Meredith Lazarski, ACP SCCP

We are greatly saddened to announce that on October 27, 2023, Hilton Head Legal Staff Professionals tendered its petition to dissolve our chapter; however, a majority of our active members will retain their membership with NALS and LSPSC as members-at-large.

Although we made every effort for numerous years to remain active as a chapter, it became more and more difficult year after year and our few active members have been struggling to stay relevant in our local legal community. Additionally, current trends in the legal field in our area have made it difficult for our chapter to obtain, engage, and retain new members. A majority of our current active members have grown older and have, or will be, retiring and the circumstances in the other active members personal and/or professional lives have made it difficult for us to continue to have an effective, meaningful chapter.

We want to thank NALS and LSPSC for their understanding of HHLSP's decision and we look forward to continuing to support LSPSC and NALS in any way we can as members-at-large. We truly enjoy and care about our national and state organizations and the friendships and memories we have made throughout the years.



## Legal Staff Professionals of Orangeburg Sonia L. Hunt

June found the members of LSPO meeting at the Dean Law Firm. Amy Rinkenberger was our speaker from the Orangeburg County Sheriff's Office Victim's Advocate Office. In July our speaker was Angel Harmon who spoke to us on the importance of Mental Health and provided us with some tips on taking care of ourselves.

In August the members of LSPO met at El Toro Mexican Restaurant in celebration of our chapter birthday. Our September meeting brought Katherine Helms, PP, SCCP and Stephanie Jones, PP, SCCP for a visit from the LSPSC Board where we were encouraged to "chart our course". October found us meeting at South Carolina Legal Services where our speaker was Janice Jenkins from CASA Family Systems. Ms. Jenkins spoke about Recognizing Abuse in Minors.

We are hard at work on annual meeting and have started a chapter fundraiser through RADA Cutlery. We will be having our annual Christmas Party in December at South Carolina Legal Services where the membership voted to do the Left/Right story using "Christmas" socks filled with goodies for the gift exchange.



## Old Fashioned Soft Molasses Cookies

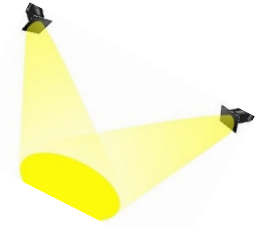


- 3/4 cup shortening
- 3/4 cup packed light brown sugar
- 1 large egg
- 1/2 cup molasses
- 2 1/2 cups all-purpose flour
- 1/4 tsp salt
- 2 tsp baking soda
- 1 tsp ground cinnamon
- 1 tsp ground ginger
- 1/2 tsp ground nutmeg
- granulated sugar for rolling cookies





LEGAL STAFF PROFESSIONALS OF SOUTH CAROLINA



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*A publication of Legal Staff Professionals of South Carolina*

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Payment Enclosed: \$ \_\_\_\_\_

Visit our website at [www.lspsc.org](http://www.lspsc.org)

Congratulate, recognize, or encourage your fellow chapter members in the *Spotlight* and support Legal Staff Professionals of South Carolina while sending out good thoughts to those who deserve them.



Business Card	\$ 5.00
Half Page	\$15.00
Full Page	\$25.00

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Thanks for making someone's day a happy one.

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Size: \_\_\_\_\_

Enclosed Payment: \$ \_\_\_\_\_



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*This isn't goodbye but see you later...  
Hilton Head Legal Staff Professionals  
1977 ~ 2023*



*Wishing you a very Merry Christmas  
and a Happy New Year!  
Beaufort County LSPSC Members-at-Large*



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more to come...



## Christmas Cake Roll

### Ingredients needed:

#### *Cake ingredients:*

- Vanilla or white cake mix
- Powdered sugar or confectioners' sugar
- Sour cream
- Canola oil
- Large eggs: At room temperature.
- Water
- Red food gel coloring
- Green food gel coloring

#### *For the whipped cream filling:*

- Powdered sugar: Or confectioners' sugar.
- Whipping cream
- Pure vanilla extract

#### *Make the cake:*

1. **Preheat:** To begin, preheat oven to 350 degrees and line a flat-rimmed 15×10-inch jelly roll pan or baking sheet with parchment paper sprayed with cooking spray.
2. **Beat eggs:** In the meantime, beat eggs in a mixing bowl with an electric mixer or stand mixer until it is doubled in volume and very thick. This should take about five minutes at medium-high speed.
3. **Mix the cake batter:** Then, slowly add sour cream, cake mix, water, and oil to the bowl and beat for 30 seconds on low speed and then on high speed for one minute.
4. **Color your batter:** Now, separate the cake batter into two separate mixing bowls adding green food coloring to one bowl and red to the other. Mix until it is your desired level of color.
5. **Make a pattern:** Next, use a piping bag to pipe the batter diagonally into the prepared pan, alternating to make a checkerboard pattern. Gently tap the pan to even out the batter.
6. **Bake the cake:** After, bake your cake for eight to 10 minutes or until the cake springs back when you touch it. Then, let the baked cake cool on a wire rack enough to touch but you still want it to be warm.
7. **Remove from the pan:** Then, sprinkle powdered sugar on the cake and cover it with a clean kitchen towel. Put a second baking sheet on top of the towel and carefully flip it over to remove the cake from the pan.
8. **Roll cake:** Last, remove parchment paper and add powdered sugar to the top before you roll the cake tightly into the towel.

**Let it cool:** Now, let the cake cool completely for about an hour before you add the filling.

#### *For the filling:*

1. **Whip it:** While you wait for the cake roll to cool, beat vanilla, powdered sugar, and whipped cream in a large bowl until soft peaks form.
2. **Fill and roll:** Then, gently unroll the cake and gently spread the filling on top. Reroll it tightly and refrigerate.
3. **Chill and serve:** Finally, after one hour, serve Christmas cake roll with whipped cream roses on top.



**LEGAL STAFF PROFESSIONALS OF SOUTH CAROLINA  
MINUTES OF THE  
2023-2024 SUMMER MEMBERSHIP MEETING  
JULY 22, 2023  
1:45 p.m.  
COLUMBIA, SOUTH CAROLINA**

The Spring Membership Meeting of the Legal Staff Professionals of South Carolina for the year 2023-2024 was held on Saturday, July 22, 2023, at 1:45 p.m. at the Homewood Suites Columbia, 230 Greystone Boulevard, Columbia, South Carolina.

Call to Order. President Traci B. Wolfe, PP, called the summer membership meeting of Legal Staff Professionals of South Carolina for the year 2023-2024 to order. She reminded everyone to check in with the Credentials Chair, Naomi W. Nation, PP, CLA, SCCP, and to silence all electronic devices. She asked all officers and chairs giving reports to come to the lectern; and all members addressing the meeting to stand and give their names and chapters. President Wolfe introduced herself to the membership.

Thought for the Day. President Wolfe introduced Hailee Thorpe from the Legal Staff Professionals of Orangeburg to give the Thought for the Day.

Pledge of Allegiance and Code of Ethics. President Wolfe asked the members to rise for the Pledge of Allegiance and remain standing for the NALS Code of Ethics. Cassandra Furtick, Functional Director of Membership/Marketing, led the members in the Pledge of Allegiance. Ann Marie Minerva, PP-SC, EP/P, SCCP, Functional Director of Education/Certification, presented the NALS Code of Ethics.

Welcome. President Wolfe welcomed everyone to the Summer Membership Meeting of 2023-2024 and thanked the members for attending the meeting. President Wolfe recognized first-time member attendee: Brett Walker, of the Orangeburg chapter. She recognized the Members-At-Large: Naomi Nation from Charleston and visitors Zariah Furtick and Ken Wolfe from Columbia. She then recognized the LSPSC Past Presidents in attendance.

Introduction of LSPSC Officers for 2023-2024. President Wolfe introduced the officers of LSPSC for 2023-2024 and thanked them for their service:

Meredith Lazarski, ACP, SCCP	President-Elect – Not in attendance
Stephanie A. Jones, PP, SCCP	Secretary
Tara Jean Brown, CLP, SCCP	Treasurer
Cassandra Furtick	Functional Director of Membership/Marketing
Ann Marie Minerva, PP-SC, EP/P, SCCP	Functional Director of Education/Certification
Katherine R. Helms, PP, SCCP	Immediate Past President/Parliamentarian

President's Remarks. President Wolfe emphasized on her theme "Charting the Course." She urged members to bring something to the association and "chart their course." President Wolfe thanked members and committee chairpersons for being an invaluable part of the association.

The FIRST INCENTIVE DRAWING was held, and Colleen Qunell was the winner of \$50.00.

Business Meeting. President Wolfe reminded everyone that any member of LSPSC may make motions, second motions, and enter discussions. All motions should be reduced to writing, and Katherine R. Helms, PP, SCCP, Parliamentarian, has forms for that purpose.

Roll Call. President Wolfe asked Credentials Chair Naomi W. Nation, PP, CLA, SCCP, for roll call. Naomi reported 19 members were present and 10, which was one member over one-half, represented a quorum. Two-thirds of the members present were 12.

Consent Agenda. President Wolfe stated that all members were provided with information in the Consent Agenda packet for review at the beginning of the meeting. The Board approved these items at its meeting on July 21, 2023.

Minutes of Annual Membership Meeting (2022-2023)  
Minutes of Spring Membership Meeting (2023-2024)  
Treasurer's Supplemental Period Report (2022-2023)  
Treasurer's First Period Report (2023-2024)

President Wolfe states that the minutes were published in the June 2023 edition of the *Spotlight* and have also been posted to the Members Only section of the LSPSC website. President Wolfe asked if there were any comments or

or questions regarding the items approved by the board. Hearing none, the above items were approved by consent.

#### Reports from Elected Officers.

*President Traci B. Wolfe, PP.* President Wolfe reminded members to make sure NALS and LSPSC have their correct e-mail address to receive the @Law, NALS Docket, or *Spotlight*. NALS profile updates should be made in the member log-in section of the NALS website.

*President-Elect Meredith Lazarski, ACP, SCCP.* Meredith had no report.

*Secretary Stephanie A. Jones, PP, SCCP.* Stephanie reminded everyone that all signed and dated reports of officers and committee chairs should be submitted to her for the permanent records.

*Treasurer Tara Jean Brown, CLP, SCCP.* Tara reported on the supplemental period from last year through March 31, 2023, and explained some of the expenses. She indicated \$3,200 was received as half of the annual meeting funds and updated her email address to [tarajbrown@icloud.com](mailto:tarajbrown@icloud.com). There were no questions on any of the information provided to the membership.

*Immediate Past President Katherine R. Helms, PP, SCCP.* Katherine had no report.

The SECOND INCENTIVE DRAWING was held, and Naomi Nation was the winner of \$75.00.

Committee Reports. President Wolfe called for committee reports by the chairs.

*Annual Meeting 2024 [Legal Staff Professionals of Orangeburg].* Sonia L. Hunt stated the committee is looking at Holiday Inn Santee with the necessary conference rooms. They will work on getting the board to approve the necessary items to reserve the space. It was discussed that the date of the Annual Meeting would be April 19 – April 21, 2024.

*Award of Excellence.* Katherine R. Helms, PP, SCCP, indicated that Traci Wolfe was awarded the LSPSC Award of Excellence at the banquet and was a nominee for the NALS Award of Excellence. Traci Wolfe, PP, said that she had her interview the prior week and would await to hear more information on the nomination.

*Certification/Education.* Ann Marie Minerva, PP-SC, EP/P, SCCP, reported that she was working on speakers for the winter meeting and the annual meeting and asked for any suggestions on speakers and topics. She reported there were 2 ACPs, 3 ALPs, 1 CLA, 4 CLPs, 1 MMC, 1 MPS, 11 PLS, 15 PPs, 1 RP, and 14 SCCPs. There are also 2 with specialty certificates. She reminded members of various exam preps on the NALS website, exam dates are all online. She reminded members that court observance weeks is November 9 through 13. Ann Marie also reminded members that there was an education library available for exams and to reach out to her for the login information.

*Community Projects.* Victoria Mayfield reported that the William J. McFord Treatment Facility was the charity for the summer meeting. She had an envelope available for monetary donations and reported that LSPSC was making a \$100 donation to the charity as well.

*Credentials.* Naomi W. Nation, PP, CLA, SCCP, had no report.

*Employment.* Sonia L. Hunt had no report as her report was in the *Spotlight*.

*Finance.* Mikki Hancock, PP, SCCP, reported that we were nearing our goal but that tickets were still available, and the next theme would be highlighted in the winter *Spotlight*.

*Financial Review.* Jamie I. Early, PP, PLS-SC Corp., SCCP, stated that her report was in the committee reports.

*Handbook.* Katherine R. Helms, PP, SCCP, reported that there were some formatting issues with the handbook and it was still under review.

*Historian.* Katherine R. Helms, PP, SCCP, had no report.

*Membership/Marketing.* Cassandra Furtick informed members that there were 98 total members. Fourteen of those were MALs, 8 were in Hilton Head, 25 in Greenville, 11 in Orangeburg, and 40 in the Midlands. She will be sending out new member questionnaires to spotlight members and wants everyone to be involved with upcoming social media posts. She challenged members to bring someone with them to the meetings and events. She will also send out the advertisement forms to be used for the *Spotlight*.

NALS Foundation. Matthew James reminded members of sweeps needed for the National Conference in Houston, TX

and that they were starting at \$50. He informed members to refer to *Spotlight* for his report and explained the grants were due September 1, 2023.

*Nominations and Elections.* Cristy Bradley, PP, SCCP, was not present and her report was in the *Spotlight*.

*Publication.* Katherine R. Helms, PP, SCCP, and Meredith Lazarski, ACP, SCCP. Katherine reminded members of the deadline of November 15, 2023, for submission of reports and articles for the December issue of the *Spotlight*.

*Scholarship.* Jan W. Berger, ALP, had a report in the committee reports for the membership to review. President Wolfe informed Jan that the scholarship was increased to \$1,500 and Jan said she would amend her report. Jan asked for members to send in candidates or suggestions for the scholarship to her for review and submission.

*Scrapbook.* Stephanie A. Jones, PP, SCCP, stated she would appreciate the members' assistance with pictures and memorabilia throughout the year for the scrapbook. She also mentioned that there was a detailed report in the *Spotlight*.

*Standing Rules and Bylaws.* Katherine Helms, PP, SCCP, had no report.

*Technology.* Cassandra Furtick stated that the new website was up and functional. She said to email her if members had not received a Go Daddy email with a link to make a username and password for the member's only page. She asked for any suggestions or comments for changes to the website. Cassandra also said there would be a community action and sponsorship tab included.

The THIRD INCENTIVE DRAWING was held, and Traci Wolfe was the winner of \$100.00.

Upcoming Meetings. President Wolfe announced the 2023 NALS National Legal Education Conference will be August 21, 2023, through August 23, 2023, in Houston, Texas at the Hotel Derek.

President Wolfe announced future meetings as follows:

*LSPSC Winter Membership Meeting.* This will be on January 20, 2024, in Columbia. Specific details of this meeting will be forthcoming.

*LSPSC Annual Meeting.* This will be held on April 19, 2024, through April 21, 2024, in Orangeburg. Specific details of this meeting will be forthcoming.

*LSPSC Annual Meetings.* President Wolfe announced the hosting chapters for the LSPSC Annual Meetings:

- 2025 Legal Staff Professionals of the Midlands
- 2026 Legal Staff Professionals of the Greenville
- 2027 Hilton Head Legal Staff Professionals

Additional Business. President Wolfe asked for any new business or anything else members had to share. Victoria Mayfield informed members that the Greenville chapter would be hosting a game night on August 11, 2023, from 6pm – 9pm. It was a free event, but they asked attendees to bring an appetizer and some games to contribute to the night's events.

President Wolfe mentioned she would like suggestions and thoughts on the winter meeting location in Columbia and whether they enjoyed Homewood Suites for the location.

President Wolfe also informed members that the jot form survey had been sent out and to still send in their responses. There was an option to put their name and the board will address those responses with a letter to explain everything to members. She also informed members that the board pays for everything but their hotel room at the meetings.

President Wolfe also informed the members that the board opened a drawing to send 3 people to annual meeting if their firm does not pay. This would include the fees for registration, CLEs, and the hotel stay. There would be three categories for the winners: seasoned members, new members, and MALs. In return, the board asked that the winners write a report in the *Spotlight*. There were no questions and the deadline to enter would be March 15, 2024, at 5:00 p.m. All submissions would go to Cassandra Furtick for a live drawing on March 15, 2024, after the 5pm deadline.

Mikki Hancock, PP, SCCP, indicated she had discussed with Jamie Early, Emeritus PP, PLS-SC Corp, SCCP, about resuming study sessions via zoom. Mikki will provide more information on that as they work out the details.

Treasurer Tara Jean Brown reminded chapters that their I-990 was due by September 15, 2023.

Adjournment. There being no further business to come before the meeting, and there being no objection, the 2023-

2024 Summer Membership Meeting of Legal Staff Professionals of South Carolina was adjourned by President Wolfe at 3:04 p.m.

Respectfully submitted,

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Stephanie A. Jones, PP, SCCP  
LSPSC Secretary 2023-2024

Approved:

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Traci B. Wolfe, PP  
LSPSC President 2023-2024



**THANK YOU TO ALL OUR LEGAL STAFF  
AND PARALEGAL PROFESSIONALS!**

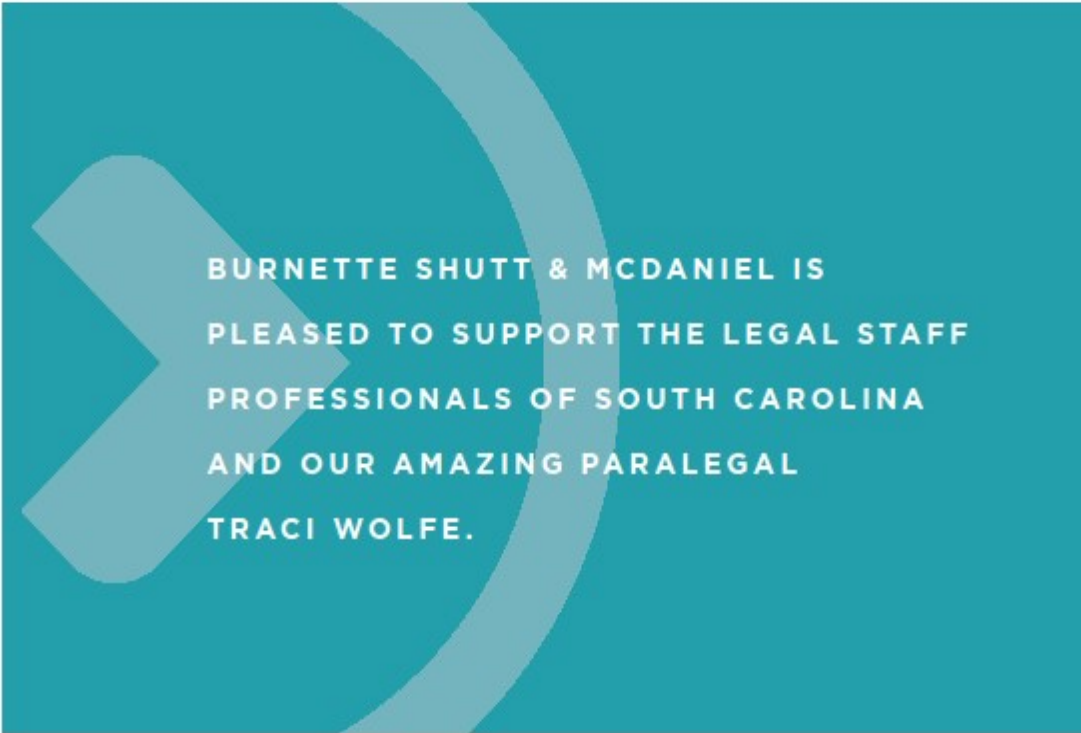
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# CLARK BOLEN

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**MATT POWELL**  
SVP, Southeast Region Manager  
803-413-8331  
matt.powell@fnti.com



**STEPHANIE COPPAGE**  
Agency Manager  
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# NOW SERVING CHARLESTON

Legal Eagle is pleased to announce the opening of a Charleston, South Carolina office through a partnership with ProLegal and Robbie Kennemur. While serving Charleston for many years, the expansion of a physical office to the area will allow Legal Eagle to provide its full array of services to the Low Country.

Since 1994, Legal Eagle has been helping South Carolina and North Carolina's law practices successfully navigate their litigation challenges. Legal Eagle has the knowledge, tools, and expertise to help. We are a multi-faceted legal support firm offering eDiscovery, digital forensics, print copy scan, trial exhibits, trial technicians, appellate support, and court reporting services.

## WHY CHOOSE US

- Legal Eagle is a full-service legal support firm. Locally owned since 1994.
- Legal Eagle offers expert staff members with paralegals, digital forensics, and eDiscovery specialists on staff.
- Legal Eagle's partnership with Robbie Kennemur increases our statewide expertise and capacity in all service lines.
- Coordination and delivery of your evidence by Legal Eagle technicians can help you to accentuate your argument to the jury.
- Legal Eagle offers stenography, voice writing, digital, and real-time court reporting services.

## OUR SERVICES



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Each Legal Eagle court reporter is materially aware of the duties and rules involving state and federal proceedings in South Carolina and North Carolina. Legal Eagle also does not charge cancellation fees.



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## ***NALS AFFINITY PROVIDERS***

### **Benefits For Members**

Through outside sources NALS is able to provide our members with many discounted services that otherwise would be substantially more expensive. Below is an overview; to access pertinent member-only information required to take advantage of these benefits.

- **Aflac:** NALS is making Aflac's accident, cancer/specified-disease, and dental insurance policies available to its members. Aflac offers a distinct type of protection. Unlike major medical health insurance, Aflac pays you (unless otherwise assigned) not the doctor or hospital. You control the cash benefits and spend them as you like to help with financial challenges an accident or illness could have to your standard of living.
- **Avis Car Rental:** We are pleased to announce that Avis is now a supplier of rental car services for members of NALS. NALS members can enjoy special member rates, considerable value-added discounts and the latest in technology, products, and services to make your car rental experience better than ever. Some of Avis' programs include: Complimentary Preferred® Service Enrollment, Where2™ GPS, and Avis e-Receipt.
- **Email Marketing by Constant Contact®:** Are you looking for an easy, effective, and highly affordable way to get your message out to your members and build strong, successful, and lasting relationships with them? With Email Marketing by Constant Contact, you'll create high-impact email newsletters and promotions in minutes, no technical expertise necessary. With more than 400 easily-customized templates, a simple point-and-click tool, and award-winning free customer support, you can create professional, compelling messages your audience will act on. And we make it easy for you to manage your contact lists, sign up website visitors, track your clicks and open rates, and send automated communications to new subscribers.
- **FedEx® Advantage Program:** By participating in the FedEx® Advantage Program, NALS members are eligible for the following discounts:
  - Up to 16% off select FedEx Express® U.S. shipping
  - Up to 12% off select FedEx Ground® shipping
  - Up to 20% off select FedEx Office® services
- **Hertz Car Rental:** Take advantage of special discounts available through NALS Hertz Member Savings program.
- **Liberty Mutual Insurance:** Liberty Mutual has partnered with NALS to offer member-exclusive savings on quality auto and home insurance. *(\*Discounts and savings are available where state laws and regulations allow, and may vary by state. To the extent permitted by law, applicants are individually underwritten; not all applicants may qualify.)*
- **Hosted~FTP~:** Want more from FTP? Move to the Cloud! Hosted~FTP~ is an easy, secure way for businesses to share files and replace their FTP servers. Visit our website at [hostedftp.com](http://hostedftp.com) and take a Speed Test! Try it free for 21 Days. No credit card required, upgrade anytime.
- **UPS:** UPS was founded in 1907 as a messenger company in the United States. UPS has grown into a multi-billion-dollar corporation by clearly focusing on the goal of enabling commerce around the globe. Today, UPS serves more than 200 countries and territories, reaching 90% of the world's population. Whether you need a shipment to arrive the same day, the next day, or in a few days, UPS will get your package there on time – guaranteed. UPS is the newest partner with NALS and now offers NALS members a discount of up to 26%.



# LSPSC OFFICERS 2023-2024

President	Traci B. Wolfe, PP
President-elect	Meredith Lazarski, ACP, SCCP
Secretary	Stephanie Jones, PP, SCCP
Treasurer	Tara Jean Brown, PP, PLS, SCCP
Functional Director – Certification/ Education	Ann Marie Minerva, PP-SC EP/P, SCCP
Functional Director – Marketing/ Membership	Cassandra Furtick
Immediate Past President	Katherine R. Helms, PP, SCCP

## LSPSC COMMITTEE CHAIRS 2023-2024

Annual Meeting	Sonia L. Hunt, Mikki Hancock, PP, SCCP and Keshia D. Shuler-Johnson
Award of Excellence	Katherine R. Helms, PP, SCCP
Bar Liaison	Meredith Lazarski, ACP, SCCP
Community Projects	Victoria Mayfield
Credentials	Naomi W. Nation, PP PLS CLA SCCP
Employment	Sonia L. Hunt
Finance	Debra H. Bailey, CLP, Angel Reid, PP, SCCP and Mikki Hancock, PP, SCCP
Financial Review	Jamie I. Early, Emeritus PP, PLS-SC Corporate, SCCP
Handbook	Susan L. Olmstead, PLS
Historian/Standing Rules and ByLaws	Katherine R. Helms, PP, SCCP
NALS Foundation	Matthew James
Nominations and Elections	Vacant
Publication	Meredith Lazarski, ACP SCCP and Katherine R. Helms, PP, SCCP
Scholarship	Jan Berger, ALP
Scrapbook	Stephanie A. Jones, PP SCCP, Colleen Qunell and Jenny Leininger
Technology	Cassandra Furtick and Colleen Qunell





Legal Staff Professionals of South Carolina  
**2023-2024 Calendar\***  
 \*subject to change



<p><b>May 2023</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>1 Open Registration for NALS 2023 National Conference-Houston. Texas (August 21-23) American Bar Association Law Day; Theme: “Cornerstones of Democracy; Civics, Civility, and Collaboration”</p> <p>15 Deadline – Submission of Reports for <i>Spotlight</i></p> <p>15 Deadline – LSPSC Chapter Rosters to NALS</p> <p>31 Deadline – NALS Award of Excellence</p>	<p><b>November 2023</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>1 Deadline for chapter boards to return Verification of Qualification forms for 2024-2025 board nominations</p> <p>1 Call for Nominations – 2024-2025 LSPSC Officers</p> <p>15 Close of Nominations – 2024-2025 LSPSC Officers</p> <p>15 Deadline – LSPSC <i>Spotlight</i> (December)</p> <p>25 Nominations’ Acceptance and Qualification forms for 2024-2025 sent to qualifying nominees.</p>
<p><b>June 2023</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>9-11 LSPSC Officer Retreat (location TBD)</p> <p>15 Deadline – LSPSC <i>Spotlight</i> Publication (July)*</p> <p>30 Deadline – Renew SCCP Accredited Sponsorship</p>	<p><b>December 2023</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>5 Deadline to return Nominations’ Acceptance and Qualification Forms for 2024-2025 LSPSC Nominees</p>
<p><b>July 2023</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>21 LSPSC Summer Board Meeting &amp; Membership Social (location Columbia)</p> <p>22 LSPSC CLE Seminars and Summer Membership Meeting (location Columbia)</p> <p>23 Deadline for Early Registration (\$359) for NALS Conference, Houston, Texas (August 21-23)</p>	<p><b>January 2024</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>8 Deadline – Registration for LSPSC CLE Seminars and Winter Membership Meeting *</p> <p>19 LSPSC Winter Board Meeting (location TBD)*</p> <p>20 LSPSC CLE Seminars and Winter Membership Meeting (location TBD)*</p> <p>20 Distribute 2023-2024 LSPSC Scholarship Award application and submit judges for board approval</p> <p>20 Distribute 2023-2024 LSPSC Award of Excellence Application and submit judges for board approval</p>
<p><b>August 2023</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>15 Deadline for Regular Registration (\$409) for NALS Conference, Houston, Texas (Aug. 21-23)</p> <p>21-23 NALS 2023 National Conference-Houston, Texas</p>	<p><b>February 2024</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>5 Prepare official ballots for distribution (if applicable)</p> <p>15 Deadline to vote/return ballots (if applicable)</p> <p>15 Deadline – LSPSC <i>Spotlight</i> (March)</p>
<p><b>September 2023</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>15 Deadline – File IRS Form 990N – LSPSC and local chapters</p>	<p><b>March 2024</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>1 Deadline to submit 2023-2024 LSPSC Scholarship Award Application</p> <p>1 Deadline to submit 2023-2024 LSPSC Award of Excellence Application</p> <p>15 Deadline – Submit completed 2023-2024 LSPSC Scholarship Award Applications to judges.</p> <p>15 Deadline – Submit completed 2023-2024 LSPSC Award of Excellence Applications to judges</p> <p>25 <b>Deadline to notify membership of election results</b></p>
<p><b>October 2023</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>9-13 NALS Court Observance Week; Theme: TBD</p> <p>15 “Verification of Qualification” forms sent to local chapter boards for approval of local members in good standing for 2024-2025 board nominations</p>	<p><b>April 2024</b></p> <p>1 Online Exam ALP, CLP, PP</p> <p>1 Deadline – Judges to determine 2023-2024 LSPSC Scholarship Award Winner</p> <p>Deadline to determine 2023-2024 LSPSC Award of Excellence Winner</p> <p>TBD Deadline – Registration for LSPSC 59th Annual Meeting and Educational Conference hosted by LSPO (location TBD)</p> <p>19 LSPSC Outgoing Board Meeting and Incoming Board Meeting (date/location TBD)</p> <p>20 LSPSC 59th Annual Meeting and Educational Conference and 2024-2025 Officer Installation (date/location TBD) *</p> <p>21 LSPSC Spring Membership Meeting (date/location TBD)*</p>



## **Mission: engage | inspire | enhance | promote**

- ♦ Engage legal professionals on their terms;
- ♦ Inspire legal professionals to want more;
- ♦ Enhance the careers of legal professionals;
- ♦ Promote legal professionals and the legal support industry.

**Vision:** NALS...the association for legal professionals is the trendsetter for providing information and education through its worldwide partnership with all related professional associations.

## **NALS Code of Ethics & Professional Responsibility**

Members of NALS 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.



Legal Staff Professionals  
of South Carolina

**NALS**



***SPOTLIGHT***

**December 2023**

**Happy  
New Year**