

# TPPA NEWS AND VIEWS

Texas Panhandle Paralegal Association  
An Affiliate of the National Association of Legal Assistants, Inc.

March 2017

Proudly celebrating 30 years of organization!

Vol. XXXI, No. X

## CLE LUNCHEON MEETING:

**WHEN:** March 16, 2017  
11:45 a.m. – 1:00 p.m.

**WHERE:** Amarillo Club  
30<sup>TH</sup> Floor, Chase Bldg.  
600 S. Tyler Street  
Amarillo, Texas

### **Cost for TPPA Members:**

\$22.00 for meal with water  
\$24.50 for meal with tea, coffee, soda\*  
CLE Credit included with meal purchase

### **Cost for Non-TPPA Members:**

\$22.00 for meal with water  
\$24.50 for meal with tea, coffee, soda\*  
\$10.00 if you wish to obtain CLE Credit  
*\*Submit beverage choice with RSVP*

RSVP to –Vicki Lorenzen [vlorenzen@bf-law.com](mailto:vlorenzen@bf-law.com) by  
10 a.m. Wednesday, Mar. 15, 2017

Correct change is appreciated. Please include beverage choice with RSVP and let us know if you would like a receipt. Please respond timely as TPPA gets charged for additional attendees.

\*\*If you RSVP and do not attend, you will be invoiced \$22.00 for the price of the luncheon.  
Thank you.

*Now is the time to renew your TPPA membership! Membership benefits include FREE CLE when attending the TPPA monthly luncheons, receipt of our informative monthly Newsletter, access to local job announcements in the legal field, and networking with fellow paralegals.*

***Make plans to attend the Annual Meeting on April 20, 2017!***

## **PROGRAM:**

### **Nuts and Bolts of a CPS Case**

Presented by Michele Surratt



*In her presentation, Ms. Surratt will outline the court process of a CPS case from intake to final trial. She will highlight different kinds of orders and motions that may be filed in a CPS case during each stage of the case as well as touch on interventions by relatives and foster parents.*

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Michele Surratt obtained her undergraduate degree from the University of Texas at Dallas in 1993, where she graduated cum laude with a Bachelor of Arts in Psychology. She obtained her law degree from Texas Tech University School of Law in 1996. While at Texas Tech, she was a member of the Legal Research Board, Board of Barristers, Delta Theta Phi Legal Fraternity, and Women in Law. She was also named on the Dean's List and Who's Who Among American Law Students.

Since 2006, Michele has served as a special litigation attorney for the Texas Department of Family and Protective Services in Lubbock.

Michele recently married and is currently celebrating her honeymoon in the East Caribbean. She says she enjoys cruising and has two wonderful dogs: Oliver and Sookie.



## *President's Message*



Dear TPPA Members,

March 2017 Newsletter

Hello all TPPA Members! We had a great speaker last month - Felipe Zavala, Attorney at Law, who spoke to us on Employment Law from the Employee perspective. I believe we all walked away from that meeting having a little more knowledge about the topic than when we walked in. And, isn't that TPPA's objective?!

This month we can look forward to Michele Surratt to educate us re: 'Nuts and Bolts of a CPS Case.' Whether you work in Family Law, or, Criminal Defense, or maybe from a personal standpoint, it is a good idea to have a little knowledge of the making of a CPS case. Don't miss this meeting.

It is that time of the year that we are looking toward officer elections, which take place at our Annual Meeting - April 20, 2017. Rhonda Brashears is chairing the Nominating Committee and a portion of our March meeting permit time for Rhonda to take nominations from the floor. You may refer to her article that was in last month's Newsletter, as well as the article that is in this Newsletter that discusses nomination procedure. Take a look at her article and contact her with your nomination (including self nomination) and include a short statement expressing why the nominee is seeking office.

It is also that time of the year to be thinking about renewing your membership. There will be a Membership Application attached to this Newsletter. You may think it too early, however, but our membership term is but May 1- April 30.

See you on March 16<sup>th</sup>!

May God bless you, TPPA, and may God Bless America!

Charlotte R. Martin, CP  
NALA Certified Paralegal - TPPA President

# TPPA Board of Directors 2016-2017

Please send Amy Piercy ([amy@wwb-law.com](mailto:amy@wwb-law.com)) any articles, flyers, announcements, or other TPPA-worthy news you would like published or circulated.

The deadline for the monthly newsletter is the first of each month. ~Thanks!

|                                    |                                                                                          |
|------------------------------------|------------------------------------------------------------------------------------------|
| President                          | Charlotte R. Martin, CP<br><a href="mailto:BCharlirose@aol.com">BCharlirose@aol.com</a>  |
| President-Elect                    | Arianna Neal<br><a href="mailto:Arianna.Neal@uwlaw.com">Arianna.Neal@uwlaw.com</a>       |
| Secretary                          | Eva Digman, CP<br><a href="mailto:Eva.Digman@uwlaw.com">Eva.Digman@uwlaw.com</a>         |
| Treasurer                          | Vicki Lorenzen<br><a href="mailto:vlorenzen@bf-law.com">vlorenzen@bf-law.com</a>         |
| NALA Liaison                       | Michelle Tyree, CP<br><a href="mailto:mytyree@bmwb-law.com">mytyree@bmwb-law.com</a>     |
| Advisor                            | Michelle Tyree, CP<br><a href="mailto:mytyree@bmwb-law.com">mytyree@bmwb-law.com</a>     |
| Parliamentarian                    | Carl Mueller, CLAS<br><a href="mailto:cmueller@bmwb-law.com">cmueller@bmwb-law.com</a>   |
| Membership Chair                   |                                                                                          |
| Public Relations Chair             |                                                                                          |
| Publications Chair                 | Amy M. Piercy, CP<br><a href="mailto:amy@wwb-law.com">amy@wwb-law.com</a>                |
| Professional Development Chair     | Penny Clark<br><a href="mailto:poppieclark@hotmail.com">poppieclark@hotmail.com</a>      |
| Job Bank Chair                     | Kelly Malone<br><a href="mailto:KelleyMalone632@gmail.com">KelleyMalone632@gmail.com</a> |
| Scholarship Chair                  | Bailey Higgins<br><a href="mailto:bhiggins@bf-law.com">bhiggins@bf-law.com</a>           |
| Student Liaison (Amarillo College) |                                                                                          |



### Advertising Rates:

| Size      | Per Issue | 6 Issues |
|-----------|-----------|----------|
| ¼ page    | \$25      | \$100    |
| ½ page    | \$45      | \$190    |
| Full page | \$80      | \$350    |

Contact [txtppa@gmail.com](mailto:txtppa@gmail.com) to place your ad!

# TPPA ANNOUNCEMENTS

**Attention TPPA Members:**

**Nominations are currently being accepted for the 2017-2018 offices of President, President-Elect, Treasurer, Secretary, and NALA Liaison. Nominations will be accepted until April 17, 2017. When making your nominations (including self-nominations) please include a short statement expressing why the nominee is seeking the office. If you are nominating another person, please include the acceptance of the person being nominated and their short statement.**

**Please email your nominations to the following: [Rhonda.brashears@uwlaw.com](mailto:Rhonda.brashears@uwlaw.com)**

**Voting by the Active members of TPPA will take place at the April 20, 2017 Annual Meeting.**

**Officers will be sworn in at the May 18, 2017 meeting.**

**Your nominations committee this year is:**

**Rhonda Brashears**

**Marilyn Commons**

**Michelle Tyree**

**Luisa Vigill**

**Contact any of us with questions.**

# TPPA JOB BANK

TPPA circulates any job position related to the legal field as a benefit to our members and local employers. This is a free service to the legal community and be sure to take advantage of getting first dibs on a job!

If you have information about an open position or would like to list a legal-related job, please email the information to [txtppa@gmail.com](mailto:txtppa@gmail.com).

## MEMBER INFORMATION

*Changed jobs recently? Moved? Graduated? If your name or contact information changes, please contact Charlotte R. Martin with updated information to ensure receipt of TPPA publications.*

## **FUNDRAISING**

**If you have fundraising ideas, please contact a member of the Board of Directors.**

Don't forget our volunteer opportunity at the Legal Aid of NorthWest Texas clinics. Contact Luisa Vigil at 373-4309 for more information.

## Happy Birthday



|               |      |
|---------------|------|
| Penny Clark   | 3/1  |
| Vanessa Baker | 3/5  |
| Charissa Cook | 3/6  |
| Arianna Neal  | 3/11 |
| Carl Mueller  | 3/16 |

**THANK YOU TO OUR SUSTAINING MEMBERS!!**

LEGAL AID OF  
NORTHWEST TEXAS  
373-6808

  
Amarillo College

# ***JOIN OR RENEW YOUR MEMBERSHIP NOW!***

The ***TEXAS PANHANDLE PARALEGAL ASSOCIATION*** (TPPA) is a group of individuals dedicated to promoting the education and knowledge of current and future paralegals from the Texas Panhandle region.

An affiliation of the National Association of Legal Assistants, TPPA proudly offers a minimum of ten CLE opportunities each year and actively participates within the community.

The purposes of TPPA are:

- To establish good fellowship among its members, the National Association of Legal Assistants (NALA), the Paralegal Division of the State Bar of Texas, and members of the legal community
- To encourage a high order of ethical and professional attainment
- To further education among members of the profession
- To cooperate with the bar associations
- To support and carry out the programs, purposes, aims, and goals of NALA

**TEXAS PANHANDLE PARALEGAL ASSOCIATION**  
*An Affiliate of the National Association of Legal Assistants, Inc.*  
P. O. Box 1127  
Amarillo, TX 79105-1127  
<http://txtppa.webs.com/>

**MEMBERSHIP APPLICATION**

**Definition of a Legal Assistant/Paralegal**

*A legal assistant or paralegal is a person qualified by education, training or work experience who is employed or retained by a lawyer, law office, corporation, governmental agency or other entity who performs specifically delegated substantive legal work for which a lawyer is responsible.*

\*\*\*\*\*

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ (Month/Day)

Professional Designation (if applicable): \_\_\_\_\_ (\*CLA, CP, TBLS, RP, etc.)

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

Home Phone: (\_\_\_\_\_) \_\_\_\_\_ ( ) unlisted      Mobile Phone: (\_\_\_\_\_) \_\_\_\_\_

E-mail address: \_\_\_\_\_ *The e-mail address listed here will be the email address to which your monthly newsletter will be sent.*

Supervising Attorney/Firm: \_\_\_\_\_

Street: \_\_\_\_\_

Mailing: \_\_\_\_\_

Employer Phone: (\_\_\_\_\_) \_\_\_\_\_ Direct dial #: (\_\_\_\_\_) \_\_\_\_\_

Fax number: (\_\_\_\_\_) \_\_\_\_\_

*Members' office contact information will be shared with TPPA members only. If you do not wish to have your contact information disclosed to the membership, please check here \_\_\_\_\_.*

**Membership Term: May 1 – April 30**

Please check the TPPA membership category for which you are applying:

\_\_\_ Active and Freelance \$45                      \_\_\_ Associate \$30  
\_\_\_ Sustaining (non-voting) \$125                      \_\_\_ Student (non-voting) \$20

**Return pages 1 and 2 of this application along with applicable dues to:**

TPPA  
Attn: Membership Chair  
P. O. Box 1127  
Amarillo, TX 79105-1127

\*As obtained by successful completion of the examination for same as published by the certifying state or national paralegal organization and maintaining the respective required continuing legal education credits

**APPLICANT CERTIFICATION**

I hereby certify that I have read the Definition of a Legal Assistant/Paralegal, the Membership Requirements, and the *Code of Ethics and Professional Responsibility of the Texas Panhandle Paralegal Association*; that I meet the qualifications for the membership category for which I am applying; that the statements contained in this membership renewal application are true and correct; and that I have never been convicted of a felony in the State of Texas or any other state. I understand that I must advise the Membership Chairperson in writing or via e-mail within 60 days of any change in my employment or education which affect my membership status.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Signature of Applicant

\*\*\*\*\*

**ATTORNEY CERTIFICATION**

I hereby certify that \_\_\_\_\_ is employed by me as a legal assistant/paralegal, as that term is defined above, and that the duties performed by said legal assistant/paralegal are under my ultimate supervision.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Signature of Supervising Attorney  
State Bar No.: \_\_\_\_\_

\*\*\*\*\*

**ACKNOWLEDGMENTS FOR FREELANCE APPLICANT**

I hereby certify that I am an Active member of TPPA in good standing. I personally know the applicant \_\_\_\_\_. To the best of my knowledge, the applicant is currently working as a freelance paralegal under the ultimate supervision of an attorney. I hereby recommend the applicant for membership in TPPA.

Signed: \_\_\_\_\_

Signed: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

\*\*\*\*\*

**STUDENT CERTIFICATION (No Attorney Certification Required)**

I hereby certify that I have read the Definition of a Legal Assistant/Paralegal, the Membership Requirements, and the *Code of Ethics and Professional Responsibility of the Texas Panhandle Paralegal Association*. I am currently enrolled in an accredited legal assistant/paralegal program leading to a degree or certificate of completion. I authorize any TPPA board member to contact the administrator of this program for verification or clarification of my qualifications for membership. I have never been convicted of a felony in the State of Texas or any other state. I further certify that the statements contained in this application for membership are true and correct. I understand that I must advise the Membership Chairperson in writing or via e-mail within 60 days of any change in my education which affects my membership status.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Signature of Student Applicant



## MEMBERSHIP REQUIREMENTS

**Active Member.** A person eligible for Active membership shall be currently employed as a paralegal under the ultimate supervision of a licensed attorney and shall also meet at least one of the following criteria:

- (i) Any individual who has successfully completed the Certified Legal Assistant/Paralegal (CLA/CP) examination of NALA, and/or the Texas Board of Legal Specialization of the Paralegal Division of the State Bar of Texas, or
- (ii) Any individual who has graduated from an ABA approved program of study for paralegals, or
- (iii) Any individual who has graduated from a course of study for paralegals which is institutionally accredited but not ABA approved, and which requires not less than the equivalent of 60 semester hours of classroom study, or
- (iv) Any individual who has graduated from a course of study for paralegals other than those set forth in (ii) and (iii) above, plus not less than six months of in-house training as a paralegal, whose attorney-employer attests that such person is qualified as a paralegal, or
- (v) Any individual who has received a baccalaureate degree in any field, plus not less than six months in-house training as a paralegal whose attorney-employer attests that such person is qualified as a paralegal, or
- (vi) Any individual who has a minimum of three years of law related experience under the supervision of an attorney, including at least six months of in-house training as a paralegal, whose attorney-employer attests that such person is qualified as a paralegal, or
- (vii) Any individual who has a minimum of two years of in-house training as a paralegal, whose attorney-employer attests that such person is qualified as a paralegal.

An Active member shall be entitled to one vote on all matters presented to the members.

**Freelance Member.** A Freelance member is a person eligible for Active membership pursuant to the criteria for Active membership listed above, except that he/she contracts for substantive legal work independently and must be performed under the ultimate supervision of a duly licensed attorney. *Applicants for Freelance membership must submit the Acknowledgment of Applicant form, signed by two Active members. The Supervising Attorney's Verification must be signed by a practicing attorney for whom the applicant has worked within the past twelve months prior to applying for membership.*

A Freelance member shall have all the privileges of an Active member.

**Associate Member.** A person eligible for associate membership shall meet one of the following criteria:

- (i) is currently employed as a paralegal under the ultimate supervision of a duly licensed attorney, but has not yet satisfied the other criteria of an Active member set out in Section 2.1.a. above;
- (ii) is an Active or Freelance member, who, upon the expiration of a membership year, is no longer employed as a paralegal. Such member may renew as an Associate member pursuant to Section 2.3.c. below; or
- (iii) is a person that is seeking employment as a paralegal, and who would otherwise meet the criteria for Active membership, but has not yet obtained a position as a paralegal.

An Associate member will have the right to vote, hold office or serve as the Chairperson of any Standing Committee. An Associate member may also chair an ad hoc committee at the discretion of the Board of Directors.

**Student Member.** A person eligible for student membership shall be an individual who is enrolled in a course of study leading to a position as a paralegal and does not meet the criteria of an Active, Freelance, or Associate member.

A Student member shall not have the right to vote, hold office, or serve as a Director or Chairperson of any Standing Committee.

**Sustaining Member.** Those eligible for Sustaining membership shall be those individuals, law firms, corporations, businesses and paralegal program representatives who endorse the paralegal concept, promote the paralegal profession and contribute support to TPPA.

A Sustaining member shall not have the right to vote, hold office, or serve as a Director, Chairperson or member of any Standing Committee.

**CODE OF ETHICS AND PROFESSIONAL RESPONSIBILITY  
OF THE  
TEXAS PANHANDLE PARALEGAL ASSOCIATION**

PREAMBLE

Fundamental to the success of any professional organization are the integrity of its members and a high standard of conduct. This Code of Ethics and Professional Responsibility is promulgated by the Texas Panhandle Paralegal Association and accepted by its members to accomplish these ends.

The paralegal profession is by nature closely related to the legal profession. Although the Code of Professional Responsibility of the State Bar of Texas does not directly govern legal assistants except through a supervising attorney. It is incumbent upon the members of the Texas Panhandle Paralegal Association to know the provisions of the attorneys' code and avoid any action which might involve an attorney in a violation of that code or even the appearance of professional impropriety.

The canons set forth hereafter are intended as a general guide, and the enumeration of these canons does not exclude others of equal importance although not specifically mentioned.

Canon 1.        *A legal assistant shall not engage in the practice of law as defined by statutes or court decisions, including but not limited to accepting cases or clients, setting fees, giving legal advice or appearing in a representative capacity in court or before an administrative or regulatory agency (unless otherwise authorized by statute, court or agency rules); the legal assistant shall assist in preventing the unauthorized practice of law.*

Canon 2.        *A legal assistant shall not perform any of the duties that attorneys only may perform or do things which attorneys themselves may not do.*

Canon 3.        *A legal assistant shall exercise care in using independent professional judgment and in determining the extent to which a client may be assisted without the presence of an attorney, and shall not act in matters involving professional legal judgment.*

Canon 4.        *A legal assistant shall preserve and protect the confidences and secrets of a client.*

Canon 5.        *A legal assistant shall not solicit legal business on behalf of an attorney.*

Canon 6.        *A legal assistant shall not engage in performing paralegal functions other than under the direct supervision of an attorney, and shall not advertise or contract with members of the general public for the performance of paralegal functions.*

Canon 7.        *A legal assistant shall avoid, if at all possible, any interest or association which constitutes a conflict of interest pertaining to a client matter, and shall inform the supervising attorney of the existence of any possible conflict.*

Canon 8.        *A legal assistant shall maintain a high standard of ethical conduct and shall contribute to the integrity of the paralegal profession.*

Canon 9.        *A legal assistant shall maintain a high degree of competency to better assist the legal profession in fulfilling its duty to provide quality legal services to the public.*

Canon 10.       *A legal assistant shall do all other things incidental, necessary or expedient to enhance professional responsibility and the participation of legal assistants in the administration of justice and public service in cooperation with the legal profession.*

*Adopted February 27, 1986*



## Legal Aid of North West Texas Equal Justice Volunteer Program

203 West 8th, Suite 600, Amarillo, Texas 79101  
800.955.6808 806.373.6808 (fax) 806.376.8056  
www.lanwt.org

With offices in Abilene, Amarillo, Brownwood, Dallas, Denton, Fort Worth, Lubbock, McKinney, Midland, Odessa,  
Plainview, San Angelo, Waxahachie, Weatherford and Wichita Falls

### **FREE LEGAL CLINICS SCHEDULED FOR 2017 IN AMARILLO**

Legal Aid of North West Texas (LANWT), a nonprofit legal organization, has scheduled 10 legal clinics for calendar year 2017 at two locations in Amarillo: the Wesley Community Center and the Polk Street Methodist Church.

The scheduled dates for the Wesley Community Center, 1615 S. Roberts, Amarillo, are:

**January 17, March 21, May 16, July 18 and September 19**

The scheduled dates for the Polk Street Methodist Church, 1401 S. Polk Street, Amarillo, are:

**February 21, April 18, June 20, August 15 and October 17**

The clinics are held on the third Tuesday of the month and run from 5 pm to 7 pm. Applicants are seen on a walk-in basis: no appointment is necessary. Applicants are asked to arrive as early as 4:30 pm, if possible.

LANWT's free legal clinics are made possible through the generous assistance of staff, private attorneys and lay advocates who give of their time to offer free civil legal advice to qualified applicants – including veterans. The evening clinics are held to enable people to obtain legal advice beyond LANWT's normal business hours.

Advice is limited to non-criminal matters, such as family law; probate, such as wills or advance directives; real property; landlord/tenant; public benefits; driver license reinstatement; federal tax matters; and consumer and debt issues.

**Please note that clinics may be canceled in the event of bad weather. To confirm if a clinic will be held or for additional information, please contact Luisa Vigil at 806.373.6808, ext. 6500 or 6503.**

*Bringing justice to North and West Texans since 1951*



## March 2017

| Sun | Mon | Tue | Wed | Thu                           | Fri | Sat |
|-----|-----|-----|-----|-------------------------------|-----|-----|
|     |     |     | 1   | 2                             | 3   | 4   |
| 5   | 6   | 7   | 8   | 9                             | 10  | 11  |
| 12  | 13  | 14  | 15  | 16<br>■ TPPA Monthly Luncheon | 17  | 18  |
| 19  | 20  | 21  | 22  | 23<br>■ TPPA Board Meeting    | 24  | 25  |
| 26  | 27  | 28  | 29  | 30                            | 31  |     |

## April 2017

| Sun | Mon | Tue | Wed | Thu                           | Fri | Sat |
|-----|-----|-----|-----|-------------------------------|-----|-----|
|     |     |     |     |                               |     | 1   |
| 2   | 3   | 4   | 5   | 6                             | 7   | 8   |
| 9   | 10  | 11  | 12  | 13                            | 14  | 15  |
| 16  | 17  | 18  | 19  | 20<br>■ TPPA Monthly Luncheon | 21  | 22  |
| 23  | 24  | 25  | 26  | 27<br>■ TPPA Board Meeting    | 28  | 29  |
| 30  |     |     |     |                               |     |     |

News and Views is published monthly by the Texas Panhandle Paralegal Association as a means of reporting and sharing news and items of interest to TPPA members. Any opinions expressed here are those of the writer and are not necessarily those of TPPA. Publication herein does not imply endorsement in any manner. All articles for publication should be submitted to the editor not later than **12:00 on the 1<sup>st</sup> day of the month**. The Publications Committee will welcome written suggestions. They may be addressed to TPPA Publications Committee P.O. Box 1127, Amarillo, Texas 79105-1127 or sent by e-mail to Amy Piercy at [amy@wvb-law.com](mailto:amy@wvb-law.com). As always, your support is appreciated.