

A man in a dark suit stands with his back to the camera on a jagged, rocky peak. He is holding a black briefcase in his right hand. In the background, a dense city skyline is visible under a clear blue sky. The San Francisco skyline is prominent, including the Transamerica Pyramid and the Golden Gate Bridge in the distance.

REMAINING RELEVANT THROUGH LEADERSHIP

SEPTEMBER 23-25, 2022 | HILTON SAN JOSE

54TH



CONFERENCE



Hilton San Jose

300 Almaden Blvd., San Jose CA 95110
(408) 287-2100

Hotel Reservations:

The discounted nightly guest room rate for Conference attendees is \$179.00 plus taxes, fees and assessments. Please make your reservations by September 1, 2022 to receive this discounted rate.

Please make your guest room reservations by visit <https://www.hilton.com/en/attend-my-event/sjcshhf-cal-7f7d58e6-6b43-4358-b434-45a0b2059632/> or calling the hotel directly at 408-287-2100 and ask for the CALSPro discounted rate.

Please follow this link to learn more about current hotel information, dining and activity hours, COVID information and amenities: <https://www.hilton.com/en/hotels/sjcshhf-hilton-san-jose/>

California Association of Legal Support Professionals

2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833
(916) 239-4065 - phone • (916) 924-7323 - fax
www.calspro.org • info@calspro.org

Conference Pricing

FULL REGISTRATION – MEMBER

On or before September 9th \$425

After September 10th \$525

FULL REGISTRATION – NON-MEMBER

On or before September 9th \$500

After September 10th \$600

SIGNIFICANT OTHER REGISTRATION

Friday Welcome Reception \$75

Friday San Pedro Social \$50

Saturday Lunch Only \$85

Saturday Banquet Only \$120

Saturday Education & Lunch (no banquet) \$175

All Above Events \$425

Register here:

<https://calspro.memberclicks.net/annual-conference-registration-form/#/>

Annual Business Meeting

The Annual Business Meeting will be held on Saturday, September 24th from 8:00 a.m. – 8:45 a.m. The purpose of the business meeting is to conduct the business of the association and allow members an opportunity to participate and get involved in the many industry and association activities. This is an important component of the conference, and all members are asked to attend.

Complimentary Conference Registration for 2022 New Members!

New 2022 Active members receive complimentary registration to attend this year's Conference. This is the perfect opportunity to meet your colleagues from throughout the state, receive amazing education, and learn about the latest trends and laws that affect your practice. If you joined CALSPRO in 2022, please complete the registration form and check the new member box. If you are a member who joined prior to 2022, thank you for your membership; please share this valuable information with a non-member colleague. Interested individuals can join now by visiting <https://calspro.org/membership/join-calspro/>. Thank you!

INTERESTED IN BECOMING A CCPS (CALSPRO CERTIFIED PROCESS SERVER)?

... or just need to renew your certification or fine tune your serving skills?

The exam is offered for free to those who attend the conference and pay for the CCPS workshop as well as those re-testing. Non-conference attendees must pay full price for the workshop and exam.

Be sure to sign up for the workshop & exam on Sunday, September 25, 2022

Please complete the separate registration form to enroll.

25th ANNUAL CALSPRO JACK C. JANNEY MEMORIAL GOLF TOURNAMENT

Friday, September 23, 2022

8:30 am Check-In

9:27 am Tee-Off

Los Lagos Golf Course

2995 Tuers Road

San Jose, CA 95121

\$150⁰⁰ per person; includes green fees, cart, and lunch.

Transportation on own. Los Lagos is located 6.3 miles from the Hilton San Jose.

Registration cutoff September 10th.

Register Now.

**Awards for
1st, 2nd & 3rd place
teams**

PERUSE THE SILENT AUCTION ITEMS AND BE A LUCKY BIDDER!

**Winners will be announced at the
Saturday Night Banquet**

Please see the sponsorship page to donate to the auction, which is a very important fundraiser for CALSPRO.

Conference Schedule

FRIDAY, SEPTEMBER 23, 2022

8:30 AM

25TH ANNUAL CALSPRO JACK C. JANNEY MEMORIAL GOLF TOURNAMENT

Tee Times Begin at 9:27 a.m.

Los Lagos Golf Course
2995 Tuers Road
San Jose, CA 95121
<https://www.playloslagos.com/>

4:00 P.M. – 5:30 P.M.

2021-2022 BOARD OF DIRECTORS MEETING

4:30 P.M. – 7:30 P.M.

REGISTRATION OPEN/EXHIBITOR SET UP

5:30 P.M. – 7:00 P.M.

WELCOME RECEPTION AT THE HILTON SAN JOSE

7:30 P.M. – 9:30 P.M. – LET'S GET SOCIAL AT SAN PEDRO SOCIAL

This offsite event, which is included in your full registration package price, will offer food, beverages, games, bowling and lots of fun! Conference name badge required for admittance. The San Pedro Social is located just a half-mile from the Hilton San Jose; be sure to register in advance to attend. <https://sanpedrosocial.com/>

SATURDAY, SEPTEMBER 24, 2022

7:00 AM – 8:00 AM

CONTINENTAL BREAKFAST

7:00 AM – 5:00 PM

REGISTRATION AND EXHIBITS OPEN

8:00 AM – 8:45 AM

ANNUAL BUSINESS MEETING

Call to Order and Roll Call, President's Report, Secretary-Treasurer's Report, Committee Reports and ratification of the officers and Board of Directors election.

8:45 AM – 9:30 AM

LEGISLATIVE UPDATE

Legislative Update with Mike Belote, Esq. & Cliff Costa, Esq. of California Advocates, Inc.

9:30 AM – 9:45 AM

EXHIBITOR BREAK

Make appointments with vendors during these breaks for more in depth knowledge of goods and services.

9:45 AM – 10:45 AM

SESSION: TECHNOLOGY PANEL: SECURITY, EFFICIENCY, & COST

Industry leaders and subject matter experts discuss the most important and impactful technology topics affecting your business, including security and efficiency, disaster preparedness and legal exposure.

Dan Mora, Photocopy Committee Chair, Gemini Legal

10:45 AM – 11:00 AM

EXHIBITOR BREAK AND EXHIBITOR PRESENTATIONS

11:00 AM – 11:30 AM

COLLECTIONS SESSION

In this session, we will discuss identifying when a customer becomes a debtor, timing on invoicing and placement, collection tips & tricks, and maintaining

your relationship with your customers and avoiding repeat debtors.

*Kimberly Nieto
Ken Koski*

11:30 AM – 12:00 PM

PREPAYMENT

Steve Janney is the CEO of Janney and Janney Legal Support Services. He will be discussing the benefits of transitioning to a guaranteed payment model along with how to transition and some of the pitfalls of transitioning. Steve has extensive experience in this challenging project, having led Janney & Janney from a model of presenting a statement at the end of the month to collecting daily for assignments completed. Steve will take questions as time allows.

12:00 PM – 1:00 PM

LUNCH

1:00 PM – 2:30 PM

KEYNOTE SPEAKER PRESENTATION

The answer: Effective or ineffective. The question: What are the two types of leaders? This is indisputable, absolute and not debatable. Which one are you? At Echelon Front the mission straight forward. Educate, train, mentor, and empower leaders and organizations to achieve total victory. Through their unique perspective as battlefield leaders and commanders, they will provide insight into what happens on a battlefield and how decisions made in war are no different than those made in the workplace. Authors of 2 NY Times Best Sellers, present an opportunity to understand what it is to be and the challenges of being a leader."

2:30 PM – 2:45 PM

EXHIBITOR BREAK

2:45PM-3:15PM

E-RECORDING

Tibault DeFrate, CSC E-Recording

3:15PM – 3:30PM

EXHIBITOR BREAK

3:30PM – 4:30PM

SESSION: CYBERSECURITY

4:30PM – 5:00PM

2022-23 BOARD OF DIRECTORS MEETING

6:30 PM – 7:30 PM

COCKTAIL RECEPTION & SILENT AUCTION

7:30 PM – 9:30 PM

BERT ROSENTHAL MEMORIAL AWARD PRESENTATION, ANNUAL AWARDS, INSTALLATION

SUNDAY, SEPTEMBER 25, 2022

8:00 AM

REGISTRATION

8:00 AM – 9:00 AM

CONTINENTAL BREAKFAST

9:00 AM – 1:00 PM

CCPS WORKSHOP AND EXAM

CODEY



Codey Gandy is a former U.S. Marine, and currently a leadership instructor, speaker, strategic advisor for Echelon Front. Codey spent just over 5 years working as a ground combat leader for various units in the Marine Corps. He brings unmatched experience in demonstrating combat leadership in dynamic environments, building winning teams, and developing relationships across all levels of an organization. Codey has seen first-hand the power of the leadership lessons taught at Echelon Front.

He brings a unique front-line perspective as he served in several levels of enlisted leadership, starting as a front-line designated marksman and finished his time in service as a Platoon Sergeant. In his role, he constantly was finding innovative ways to improve training and challenge his guys in preparation for the real-world battlefield. Upon his discharge from the Marine Corps, Codey joined Echelon Front while providing unmatched experience and unique perspective into combat leadership, front-line leadership, and creating winning teams. He serves as the Experiential Training Program's Operation Manager, 1st Responder Training Lead, leadership instructor, speaker, and strategic advisor at Echelon Front.



GANDY

