



THE AMERICAN ALLIANCE OF PARALEGALS, INC.

Advancing the Paralegal Profession
by Focusing on the Individual Paralegal



THE ALLIANCE ECHO

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PRESIDENT'S MESSAGE

Debbie Repass RP

The weather outside may have been gloomy, but the atmosphere inside was bright for the American Alliance's Fourth Annual CLE Seminars. The speakers shone through in their presentations with their focus on advanced practice paralegals.

The morning began with a presentation on Medicaid by Gregory S. French, a certified elder law attorney. Mr. French's presentation focused on how to plan for disability care through wills, trusts, powers of attorney, and health care directives. Mr. French guided us through a maze by clearly explaining the difference between Medicare and Medicaid benefits. My head was spinning when the session was over with all the things you need to consider. I was glad that Mr. French left us with a wealth of valuable reference information.

Next, Thomas L. Rouse, a Partner, with Wallace Boggs Colvin Rouse Bushelman, PLLC of Northern Kentucky gave a presentation on professional ethics and civil litigation. His wealth of knowledge and personal experience on ethics were engaging. I particularly liked it when he talked about the "Ethics Hot Line." It was interesting to hear first hand how the

process worked and what kinds of cases are heard.

Lunch was highlighted by a brief "Meet the Board" session. Each board member gave a short presentation. At the end, attendees were given the opportunity to ask questions. It gave the attendees a chance to learn more about their board members and the organization.

After lunch, attendees had to choose! They either attended an advanced legal writing session presented by Kathryn L. Myers, Associate Professor and Coordinator of Paralegal Studies, Saint Mary-of-the-Woods College or UPL, Ethics And Comparative Analysis presented by D. Allan Asbury, Attorney at Law, who serves as secretary for the Board on the UPL of the Ohio Supreme Court. I chose to attend Mr. Asbury's presentation. Mr. Asbury walked us through interpreting and applying court rules to proceedings before the Board. This also made it interesting to be able to compare multi-state issues with the difference between ethics in Kentucky as presented by Mr. Rouse with ethics in Ohio as presented by Mr. Asbury.

If you like to write articles or have articles you have written and would like to submit them to *The Alliance Echo* for publication, contact Karen Ray at secretary@aapipara.org.

Those who attended the session by Kathryn Myers said she not only provided a lot of factual information, but also offered “Writing the Issues” segments that allowed the attendees to gather in groups and mix and match scenarios, differences, and similarities of practicing as a paralegal throughout the nation. It was clear at the board meeting that evening that Kathryn made a powerful impact. Time was spent redrafting documents to apply the lessons learned.

If you were not in the second part of Kathryn Myers’ advanced legal writing session in the afternoon, you attended the session on Identity Theft presented by Walter J. Wright, Supervisory Special Agent for the FBI. After beginning the session with a questionnaire on things you do or do not do to disclose regarding your personal information, Mr. Wright showed a film on “new ways being used to steal your identity.” The slide presentation and handouts that followed provided a vast amount of information. All who attended left with several changes they were going to make in their personal lives as soon as they got home.

Thanks to all the presenters. They understood that they were presenting to advanced paralegals, and it showed. Thomas Rouse said he realized early in the presentation that he was dealing with advanced paralegals and was glad he was prepared. The questions asked by the participants showed that the attendees had a vast knowledge on the subject. Mr. Rouse said it was a pleasure to speak before such a well-informed group.

A special thank you goes out to the Seminar Committee: Carolyn Saenz, AACP, Angela Baker-Colyer, AACP, Vanessa Beam, CLAS, and José Pedro Santos, AACP. They did an incredible job. The hotel was in a great location. The rooms were great and even the food was good.

I want to again take the time this year to thank RedLark. RedLark is the company

that works on our webpage. They continue to do a great job and strive to find ways to assist the board in providing information to the membership via the website.

Saturday morning began with the Annual Meeting and election of the President and Director of National Affairs. Both of the current officers will be returning in these positions. I was reelected your President and Marie Koster was reelected Director of National Affairs.

The American Alliance had a great year. I have not listed these in order of priority, but more in the order they occurred:

1. We reached a total of 36 AACPs in less than two years.
2. AACP trademark was applied for.
3. Changed education criteria from substantial compliance with ABA guidelines to now requiring the paralegal program be ABA approved or be a **voting** institutional member of the American Association for Paralegal Education (“AAfPE”).
4. Created online seminar registration through Paypal.
5. Drafted comments to have the AACP designation included as part of paralegal certification/regulation scheme to the:
 - ◆ Indiana Supreme Court Committee on Rules of Practice and Procedure
 - ◆ Florida Supreme Court for the Florida Registered Paralegal Program
6. UPL Position Statement created.
7. CLE Coordinator Position created. Angela Baker-Colyer, AACP is the CLE Coordinator.
8. Marketing Committee created – Gwen Minnier, CLAS, and Tom Donoho, AACP are the members of the Committee. They are currently working on a “Frequently Asked Questions” page for the website.
9. Created a webpage listing AACPs by State.

10. Sending out the board agenda to members prior to the board meeting to encourage member participation in the monthly board conference calls.
11. Implemented new banking procedures.
12. Created a policy for mileage reimbursement.
13. Added member and AACP profiles to the Newsletter beginning with the Winter 2006 issue. José Pedro Santos, AACP and Laura Michael-Curthoys, AACP have taken on this responsibility. If you are contacted by them, I hope you will consent to have your profile in *The Alliance Echo*.

The board is currently working on several things:

1. CLE Criteria
2. AACP Renewal Guidelines
3. Linking Agreement
4. Members Only Webpage
5. Advertising Plan

The board's goals for next year are to reach out to the members by finding out what they want from the board, expand our marketing to focus regionally, provide CLE opportunities twice a year, improve ways to get the word out about the American Alliance and the AACP, improve member participation, member retention, and continue to add to the membership roster.

As you can see, the board is very busy, and we need your help. If you see an area that you have an interest, please let us know. The following are areas where the board needs immediate assistance:

- Annual Seminar Committee
- CLE Committee
- Membership Committee
- News articles or materials to be included in the Newsletter
- Website

The board came away from the Annual Meeting energized as we head into the final quarter of the year. Plans are already underway for next year's Annual Education Seminar. I hope it will be in a location that you can attend. It is certainly something you do not want to miss!

As we have begun the holiday season, I want to wish all of you the beautiful moments and happy memories that this season brings.

Director of National Affairs Receives Award

Your Director of National Affairs, Marie Koster, just won an award from the *Wisconsin Law Journal*. Marie participates in a pro bono project at work where she staffs the office of the Task Force on Family Violence twice a month on Wednesday afternoons. They have an Unsung Heroes program honoring associates, paralegals, secretaries, law librarians, and technology people for their outstanding contributions to the legal field. Marie's firm nominated her and she won. There will be a luncheon in November honoring all the winners in each category and an announcement in the *Wisconsin Law Journal*.

Congratulations, Marie, on this well-deserved honor!

Welcome New Members

- Ginka Anguelova, Illinois
- Cheryl Burton, Ohio
- Fern Burnett, California
- Scott Gray, Florida
- Tracy Kaiser, Pennsylvania
- Joseph Mansour, AACP, Ohio
- Laura Michael-Curthoys, AACP, New York
- Flavia Miranda, Florida
- Mary Beth Pletzke, Illinois
- Aileen Polli, Virginia
- Jacqueline Scarpelli, Illinois
- Susan Valentini, Tennessee

“A Thank You from a New York Paralegal”

On September 11, 2006 I received my AACP designation from the American Alliance of Paralegals, Inc via U.S postal service. It is fitting that it should come on a day that many Americans have come to use as a day of prayer and reflection of the tragedy of Sept 11, 2001 and symbolizes bringing together both the past and the present. American Alliance has also been a means of bringing the past and the future of my profession together to accomplish recognition as a Certified Paralegal.

My name is Laura Michael-Curthoys and I am a “New York Paralegal”. I am employed as a Real Estate Paralegal and Closing Department Manager under my supervising attorney, Scott Holcombe, Esq. He is the owner of Marathon Abstract, LLC located in Upstate New York in the City of Rochester.

American Alliance is the only organization within the Paralegal Profession that requires both the past qualifications of education in an ABA approved program and solid work history for both membership and certification. I welcome this into my career as I am both a returning adult student and lifetime learner. I believe that my membership and certification with American Alliance will be invaluable in the Upstate New York area where I am employed. New York is the hub of the U.S where diversity and variety abound. The job market is very complex and competitive. The real-estate market is constantly rising and falling. This is creating a constant influx of new workers and repeated layoffs. It is extremely important for employees to retain marketability.

I have noticed, through out the years, many worker in the real-estate field are using confusing and misleading job titles such as closing co-coordinator, legal reviewer, real-estate specialist, legal real-

estate secretary. Many of the individuals whether intentionally or otherwise use that term paralegal very loosely with total disregard to the American Bar Association (ABA) requirement relating to the use of the title “paralegal”. Also, with the prevalence of short term paralegal programs that leave an employee ill-equipped to enter the legal work place as stated by the American Association for Paralegal Education (AAfPE). That is a point that was well made by the two articles that were written by Deborah McKinney, RP, AACP, AAPI’s past Education Director and Carolyn Saenz, AACP, AAPI’s Membership Director, co-authored two articles titled "[How to Hire A Quality Paralegal](#)" and "[Do Paralegals Need to be Certified?](#)" that were recently published in the Cincinnati Bar Association Report. I would recommend that both employers and paralegals review the content of these articles.

In conclusion, I would like to thank the American Alliance and say that on this Sept 11th “I am proud to be an American, and grateful for the American Alliance for providing me, as a New York Paralegal, the opportunity to be involved in an organization that is such an important part of the future of paralegal profession”.

Sincerely,

Laura Michael-Curthoys, AACP
Rochester, New York

Congratulations To Our Newest AACP’s!

Christina R. Bedel, AACP
Carla Denise Chrisp, AACP
Laura Michael-Curthoys, AACP
Thomas James Gent, AACP
Joseph Mansour, AACP
Deborah A. Repass, AACP, RP

**Paralegal's career spans
60 years**

**Winifred Kirk is still dedicated
to her work**

by Tara E. Buck
Daily Record Reporter
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photo caption: **ON THE JOB** — Paralegal Winifred Kirk at the law offices of Muehe & Newton LLP.

EDITOR'S NOTE: The following article is an introduction to a series devoted to paralegals. Tomorrow's edition will highlight one of four Western New York paralegals recognized for her excellence and dedication to the profession.

Winifred Kirk, 87, began work as a paralegal in Ithaca in 1943 after her second son was born. She said recently she never was the type of woman who could stay at home.

It appears she still doesn't want to stay at home: She continues working now three days a week at the law offices of Muehe & Newton LLP in Canandaigua, and does freelance work for other attorneys as well.

"I'm not a person to sit around," she said at Muehe's offices. "I wanted to make something of my life, you know? It was very challenging. Law work is challenging and

you learn some things with every different situation."

She was first married in 1938 during the Great Depression, and said that "in those days ... you really needed to work. You needed to keep things going. It was tough to make ends meet."

Her specialty is estates and trust work, which she was self-trained to perform, with some help from her Ithaca employer, Allan H. Treman (Treman was the son of Robert H. Treman, who donated land for the state park that bears his name near Trumansburg. The Allan H. Treman State Marine Park, which is on Cayuga Lake, is named for her former boss.)

Estates administration is also her favorite area of law. She handled many multimillion dollar estates in Rochester for the Forsyth firm.

"The more money there is, the more challenging it is," she said. "It's been a satisfaction, in particular, to help ladies who never had to do anything, who had husbands who did everything. They become widows and all at once they're just overwhelmed with everything. It's a satisfaction to help them get started with their lives and move on."

Kirk was widowed twice. She married her first husband, Spencer Harford, in 1938. They had two sons, Spencer Jr. and George. Harford died in 1963. She later married Boyne Kirk, who has also since passed away.

She trained a former daughter-in-law to work as a paralegal, she said, but never encouraged her children to pursue a career in law, leaving them to make their own career decisions. Both sons became successful businessmen.

When her husband, Spencer, took a job as a machinist with the American Can Co. in

Fairport in 1954, Kirk began work with the Forsyths in Rochester.

She and her husband lived in Victor, and she said she made the trip in to the city every day, "in all kinds of weather."

She worked there until 1987, when she began working exclusively on a freelance basis.

When she first started her career, there was no formal designation of the job as "paralegal," but instead she was referred to as a "secretary."

"I did a little bit of everything as an employee," she explained. "I did litigation to begin with, and general law work. I've always liked legal work, business law, things like that."

She said it wasn't until later in the 1940s that the job took on its present title.

When she arrived at the Forsyths, she was the only employee "for a long time. Eventually they had one other employee come in," she said.

"We shared space with Culley Marks and I used to do their estate work, too, for a long time. Then they brought in a girl who was trained [officially as a paralegal] and I helped to train her to do estates work."

"I think it's a nice position to have if you're not able to go on to attorney or something like that," she said. "I think it's a good stepping stone for that."

Kirk had an opportunity to go to law school in the 1960s, and was encouraged to do so by her bosses, however she chose not to because she had just been widowed and both of her sons were in college.

"I just couldn't do it. I was selling real estate on the weekends and nights to pay for their education," she said. "When you're left on your own, you have a lot of responsibilities."

Kirk said she always felt respected as a paralegal by her employers, and that she never experienced anyone doubting her abilities.

"In a smaller office, you get more recognition than in the larger firms.

People call up and ask for you and they know you're in charge of a file and are doing the work," she noted. "I've never been let go from a position. I never gave them any reason to, I suppose. I used to take work home with me."

She still does.

"But I don't know if I'll work after this year or not," she said.

A spinal injury she suffered while painting a house in Ithaca in 1968 still gives her pain today, and it's becoming increasingly difficult for her to work regular hours.

She said she's continued working long past normal retirement age because of a sister who died from Alzheimer's Disease.

"I think you need to keep your mind busy," she explained of getting older.

She's seen the legal world change through the years, but added that most of that change has been in the addition of more and more people to the field, and in the laws themselves.

"I went to a lot of seminars" in New York City and locally, she said. "The IRS used to do seminars and I used to always take those things in. They were very beneficial. You take advantage of those because it always makes you more important to your work."

Patti Henderson, a secretary at Muehe and Newton, LLP, has nothing but respect for Kirk, she said.

"She doesn't forget a thing," Henderson noted. "Her memory's better than mine. ... She gives the best advice, whether it's regarding the law or something personal."

Henderson also marveled at Kirk's ability to use new technologies: "She's not afraid of the computer."

Kirk said she's helped many younger paralegals make their way in the field, but is reticent when asked what advice she might give today.

"Sometimes it's thankless, but that's true in any field. I certainly have never been put down in any way. Sometimes they (attorneys) yell at you a little bit, but you yell right back at them."

"No, not really," she said, laughing at the thought of yelling at a boss.

"You hold your tongue."

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TEXAS PARALEGAL DAY **October 23, 2006**

The State Bar of Texas was the first bar association in the United States to create a separate division for paralegals. The Paralegal Division of the State Bar of Texas (*the "Division"*) was created on October 23, 1981. The Division has been in existence for 25 years, and is celebrating its' 25th Anniversary.

In light of the exclusive use of the paralegal title, the Division obtained a Texas House Resolution to promote the adoption of Texas Paralegal Day. *Please join us in recognizing and celebrating Texas Paralegal Day on October 23, 2006, and the Division's 25th Anniversary.*

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