

# Bar Bulletin

Serving San Luis Obispo  
County's Legal Community

July–August 2024



PSRST STD  
U.S. POSTAGE  
PAID  
PERMIT #500  
CLAREMONT, CA

ADDRESS SERVICE REQUESTED  
San Luis Obispo County Bar Association  
PO Box 585, San Luis Obispo, CA 93406

Community Law Day May 1  
San Luis Obispo Unity Bar Updates  
SLO's Legal Community of Yesterday  
Join Us at SLOCBA's Summer Social July 25!  
SLOLAF's Disco Fundraising Event





# Certified Divorce Real Estate Expert



## LINDSEY HARN

*#1 agent in sales volume and number of transactions in SLO County in 2019, 2020, 2021, and 2022.*

- Over \$1.1 billion in closed sales
- 13+ years of experience in real estate
- A neutral, third-party listing agent
- Specifically trained for high conflict cases
- Available to serve as a 730 Expert Witness
- Free consultations on real estate discovery
- Team of experts available as resources (credit repair, financial analysis, divorce-specific lenders, etc.)

Free Attorney Document Request Portal: [slolegaldocs.com](http://slolegaldocs.com)

**Call me at 805.441.7744 for help with real estate questions.**



Lindsey Harn

Realtor® | License #01868098

805.441.7744

[lindsey@lindseyharngroup.com](mailto:lindsey@lindseyharngroup.com)

[lindseyharngroup.com](http://lindseyharngroup.com)

**#1 Agent**  
in SLO County!

**Top 1%** of real estate  
professionals in the  
country!



**LINDSEY HARN**  
GROUP

**CHRISTIE'S**  
INTERNATIONAL REAL ESTATE

**sereno**

**SAN LUIS OBISPO  
COUNTY  
BAR ASSOCIATION**

2024  
*Board of Directors*

**President**

Melissa Chabra

**Vice President**

Elizabeth Culley

**Secretary/Treasurer**

Nicole Norris

**Bulletin Editor**

Tara Jacobi

**Ex-Officio**

Gregory Gillett

**Directors**

Jon Ansolabehere

Stephanie Barclay

Amanda Busick

Allen Hutkin

Hannah Murphy

Ginger Ortiz

Lester Paredes

Lisa Sperow

Kara Stein-Conaway

Lisa Toke

**Non-Directors**

Judge Erin Childs

Judge Matthew Guerrero

*Sections*

**Alternative Dispute Resolution**

Andrew Weiss (805) 709-0304

**Civil Litigation**

**Criminal Defense**

Matthew Hanley

Interim Chair (805) 541-3777

**Estates and Trusts**

Shannon M. Bio (805) 781-3645

**Family Law**

Robbi Rizzo (805) 593-0593

Valerie Hosford (805) 439-1906

**Labor & Employment Law**

Jane Heath (805) 225-1773

**Real Property Law**

Courtney McKeever (559) 753-2567

**Emerging Lawyers**

Valerie Janiel (805) 781-5400

San Luis Obispo County



**CONTENTS**

President's Message—Why Do We Do What We Do?	4
Editor's Note	6
SLO Bar Association Endowment	7
Community Law Day Welcomed Attendees May 1	8
Updates From San Luis Obispo County Unity Bar	11
A Look Back at SLO's Legal Community of Yesterday	12
Use "Co-Pilot to Improve Contract Drafting Workflow: A Tutorial for Business Attorneys	14
Paralegal Compliance & CCPA Events	17
Find the Place Where Troubles Melt...	19
Join Us at the SLO County Bar Association's Summer Social on July 25!	22
A (Disco) Ball Was Had at SLOLAF's "Boogie Fever" Event	24
Submission Guidelines/Editorial and Advertising	30

*Cover: On a May visit to Washington, D.C., photographer Tara Jacobi captures a solitary SCOTUS on an early, cloudy morning.*

**BAR BULLETIN COMMITTEE**

**Editor:** Tara Jacobi — tarajacobi@icloud.com

**Photographer:**

**Publisher:** Joni Hunt — jonihunt@att.net

**Advertising:** Kerrin Adams — (805) 541-5930  
slobar@slobar.org

The *Bar Bulletin*, ©2024, is published six times a year by The San Luis Obispo County Bar Association, P.O. Box 585, San Luis Obispo, CA 93406, (805) 541-5930, and subscription is included in the membership dues. The *Bar Bulletin* welcomes and encourages articles and letters from readers. Please send them to Tara Jacobi at the above e-mail address. The San Luis Obispo County Bar Association reserves the right to edit articles and letters for publication. All material herein represents the views of the respective authors and does not necessarily carry the endorsement of the San Luis Obispo County Bar Association, its Board of Directors, its committees, and/or its sponsors and advertisers, unless specifically stated.

# President's MESSAGE



## Why Do We Do What We Do?

by Melissa Chabra

**W**hy do we do what we do? This is the question I have been pondering this month. To change things up, I thought I would ask some of you, our members, to help me with this President's Message. I sent a random spattering of emails to a random selection of attorneys in SLO County and asked these two questions: *Why did you become a lawyer?* And now, *at this point in your career, why do you do it?*

You will all laugh when I tell you the most common response to this email. In true lawyerly fashion, it was "when is the deadline?" But once the substantive answers started rolling in, I was both inspired and fascinated by the responses. Based on my entirely unscientific research emails, no matter what the practice area, we seem to be a group of people who generally want to help other people, our communities and also enjoy our compensation (aka money!). Thank you to all of you who responded.

Without further delay, for your consideration and amusement, here are the responses (edited for length).

"Although it sounds cheesy, I became a lawyer because I wanted to have the power and knowledge

to right wrongs and make the world a better place. I still do it because I love learning new things and helping people by using my knowledge and experience."

—29 years of practice (Public Service and Education)

"I became a lawyer to help people. As a public defender I have good days and bad days. Sometimes I love what I do and other days I find it soul crushingly frustrating and sad. I believe that I can make a difference on a case-by-case basis."

—21 years of practice (Public Service/Criminal Law)

"I took one business law class and everything changed. I enjoyed the learning and the application of law to real situations. Regarding your second question, I worked in a plaintiff-oriented business law and intellectual property practice for 10 years before deciding that I wanted more trial work, and there was precious little available in the civil world. So, I became a deputy district attorney and practiced both criminal and civil prosecutions for the next 23 years. I came to love the challenge of proving the truth of criminal and

civil charges to a jury and judge, respectively."

—42 years of practice (Public Service/Criminal Law)

"I grew up in a family that had a small business. With that upbringing, I learned the value of good customer service and that our community identities are often defined by our mom-and-pop shops and local businesses. During college, I had an opportunity to see firsthand how small local government interacts with its community. I saw what good interaction looks like, and I also saw what poor interaction looks like. I said to myself that I wanted to play a role in local government to make sure that the values that I was taught as a kid, good customer service, honesty and fairness, were implemented at the local agency level. I continue to do it for those very same reasons that I first started."

—10 years (Municipal Attorney)

"I became a lawyer because my dad was (and is) a lawyer, and because I loved (and still love) to argue. I do it because I love it, especially when I win in court."

—27 years (Civil Litigation)

"I was often told that I should become a lawyer because I 'liked to argue.' My favorite comment, though, was from my dad, who said to me when I was about 10 years old, 'You'd better get a job where you get paid to talk, because if you don't, you're going to get fired.'

I was lucky enough to go to college and law school at a time where there was outreach and financial aid for students coming from communities of color and who were underprivileged. I think I became an attorney in order to use my educational opportunities to help black and brown people in what I believed was an 'unjust' system.

Why do I continue? I love working with the marginalized people in our community. I like providing these clients with the best possible representation. I like being in a position to hopefully make them feel like they are being listened to, that they have rights that have to be acknowledged, and that they have outcomes that are fair."

—33 years (Public Service/  
Criminal Law)

"Why did you become a lawyer: My mom told me to. Why do you still do it: The money."

—15 years (Civil Litigation)

"At a young age I wanted to become a lawyer because I wanted to have a career to be able to financially take care of myself. It was important to me, as a woman, to not have to rely on someone else to provide for me. Secondly, becoming a lawyer gave me confidence as a woman.

At this point in my career, I do this job because I enjoy working with law enforcement, victims, and I love working with a team. Being an attorney can be lonely, and as a prosecutor, you have a team who can help you with your cases and can appear

on your matters because we are fungible."

—3 years (Public Service/  
Criminal Law)

"Growing up, the only attorneys I knew were those I watched in movies and television shows. Whether it was Tom Cruise, Al Pacino or Dylan McDermott, I was drawn to the idea of helping others using wit, intellect, and moral fortitude. While my current occupation may not involve the same level of drama and adventure as the fictitious attorneys I once idolized, I'm incredibly proud to serve others and do my part to protect the safety and well-being of my community. "

—10 years (Public Service/  
Criminal Law)

"Actually, my mom tried her best to discourage me of being an attorney, placing me in a marketing agency as an intern and trying to get me involved in a more 'relaxed environment,' but I had a feeling inside me about the law. As a professor from my alma mater joked, 'If you want to become a litigator, you'll live less but your life would be more exciting.' Now I'm a litigator, and it is my passion, unfortunately there's no time I do not think about my clients and the way I can help them and make their life better."

—21 years (Civil Litigation/  
Personal Injury)

"I became a lawyer to become a public defender and give a strong voice to those who could not afford one. I had always wanted to become a physician but when I was a pre-med student at USC, I learned of something called 'mock trial.' I fell in love immediately, began memorizing the federal rules of evidence over the winter break and changed my major the following semester. At this point

in my career, I still practice law to bring fairness to the system."

—16 years (Family Law)

"When I was a little girl growing up, every once in a while, my dad's cousin, whom he affectionately called 'Cousin Megabucks,' would come visit. He and his glamorous wife, Jane, would have their Cadillac shipped over and they would take us to Michelin-starred restaurants and super fancy hotels. Once, we even got to spend the night in a castle. The cousin was an attorney from California. I dreamed of Cadillacs and castles for my future. I wanted to be a lawyer.

With the ambition to making big bucks and with the confidence I gained in drama class, I became convinced that I would be a big-name trial lawyer, which is funny...since upon completion of law school, I began my career in public service... where I happily remain today."

—26 years (Public Service/  
Criminal Law)

As for me? Let's just say it had to do with a strong sense of justice, a chance for financial stability and a love of arguing. Also, "Law & Order." Lots of "Law & Order."

Though we all have our own histories and motivations, it's easy to see common threads above. Let's remember that as we gather together for our summer social this month. See you all there. ■



**To make a donation to the San Luis Obispo County Bar Association Endowment, please scan the QR code.**



## Editor's Note

by Tara Jacobi

Standing before SCOTUS, I am so grateful to be in our nation's capital. Ironically, two months before, while at our local dog park, I met a couple who was in town. He was tending to his 90-year-old mother; he had grown up here, but they now lived in D.C. I quizzed them on my research about the city and they happily gave me more insight. They proceeded to tell me it's not the crime-ridden place that the national news tells us. I imparted that I am from New York and knew some about city stereotypes.

Visiting D.C. as a child, I never did some of the things I did with my son on this visit. But there is even a stronger motivation for me being there—I never went to my law school graduation. I was likely overwhelmed by what I was facing in my life at the time and not inclined to celebrate. I didn't make it a priority, but maybe I should have. This trip I had the opportunity to change the past, attending graduation and receiving that diploma, all while having my son watch his mother, which he usually sees in a certain light, be different than he knows.

National events are happening right here in San Luis Obispo too. Law Day gave our community the opportunity to learn more about how our courts serve our community members. Presiding Judge Federman kicked off the

activities discussing the role of the court, trials, juries and more. Legal services organizational booths were brimming with information, while Morro Bay's Mock Trial Team was in action before the court trying on being lawyers. And attorney volunteers gave consultations to community members. Hope you had the opportunity to partake in the event. And if you volunteered your time to make it happen, thank you.

Kara Stein-Conaway is an amazing SLO Bar member worth knowing, if you haven't already gathered. She is sharing with us some of her wisdom. She is inspiring readers to know their self-healing powers within. And as a community leader, she is always recognizing that everyone has something of value to contribute, embodying her distinct and unique leadership style.

SLOLAF's annual fundraiser raised resources to continue their mission. Executive Director Donna Jones gave us an update. Many smiling faces are working to make home a better place. Enjoy the pages ahead.

And if you—like my son—wonder why I love tortoises, ironically they are found all around SCOTUS, symbolizing what children's literature has taught us all along. ■



The San Luis Obispo County Bar Association Endowment  
to Assist Persons of Color in Pursuit  
of a Career in the Legal Profession

See Scholarship eligibility criteria and donation details at [www.slobar.org](http://www.slobar.org).  
For more information, contact Executive Director Kerrin Adams at [slobar@slobar.org](mailto:slobar@slobar.org).



Founders Circle — \$10,000



Officer of the Court — \$5,000+

Rita Federman & Douglas Federman

The McIvor-Hall Family



Advocate — \$1,000+

Alton & Allen, Inc.

Erin DeNatale & Joe Benson

Dan Dow

John F. Sachs

Alicia Valdez Wright



SAN LUIS OBISPO  
COLLEGE OF LAW



The Basile  
Law Firm



Barrister — to \$500+

The Baltodano Firm,  
A Professional Corporation  
Tana Coates  
Thomas DeNatale  
Michael Duffy  
Ginger E. Garrett  
Michelle Gearhart  
Josh George  
Matthew Guerrero  
Hutkin Law Firm APC  
Ken Jorgensen  
David & Sharon Juhnke  
Michael & Sharon Kelley  
Kelly Manderino  
Roderick A. Rodewald  
Craig van Rooyen  
Martin Tangeman  
Lisa L. Toke  
Betsy Robertshaw Umhofer

Solicitor — to \$100

Kevin Anderson, Attorney  
at Law  
John Ansolabehere  
Stephanie Barclay  
John Carsel  
Melissa Chabra  
George, Cyr & Christakos, Inc.  
Eric Dobroth  
Jacqueline Vitti Frederick  
Patricia Gomez & Frank Seiple  
William Herreras  
Douglas Heumann  
& Eveline Blanchett

Lisa A. Hogarty  
The McIvor-Hall Family  
Jed Nicholson  
Trudy O'Brien  
James B. Orton  
& Tonga McGill  
Khoulood Pearson  
Gayle Peron  
Michael R. Pick Jr.  
Danielle Plevel  
Clay A. Schroeder  
Sheryl M. Wolcott

Jurist — to \$50

Ryan C. Andrews  
Jan Howell & Steven Marx  
Ken Jorgensen  
Abby Lassen  
Teri Sherman  
Law Office of  
Stephen M. Stern, PC  
Keolamaikalani Taniguchi  
Katie Zwarg

To make a donation,  
scan this QR code...



# Community Law Day — May 1, 2024

Photos courtesy  
of Tara Jacobi

Presiding Judge Rita Federman welcomed attendees to Community Law Day, educating community members about our court, juries, trials and more. Following Judge Federman, Nancy Welts addressed community members about the responsibilities of San Luis Obispo County's civil grand jury. After this discussion in the jury room, those in attendance could watch the Morro Bay High School Mock Trial Team in action. Kevin Ramey, acting as judge, found the defendant guilty of murder.

The following legal services organizations had booths in the lobby to speak with community members:

- San Luis Obispo Legal Assistance Foundation
- California Rural Legal Assistance
- Department of Child Support Services
- San Luis Obispo Superior Court Self-Help Center and Family Law Facilitator's Office
- Creative Mediation
- Lawyer Referral and Information Service
- District Attorney Victim Witness Assistance
- Women Lawyers Association
- Cal Poly Low-Income Taxpayer Clinic
- Grand Jury

Approximately 25 community members took part in 20-minute consultations provided by volunteer attorneys from the San Luis Obispo County Bar Association.

Thank you to all the volunteers who assisted community members participating in Community Law Day! ■



*Kerrin Adams, San Luis Obispo County Bar Association Executive Director, also heads the Bar's Lawyer Referral and Information Service (LRIS).*





*Kevin Ramey, acting as judge, presided over the Morro Bay High School Mock Trial Team's case.*



*Presiding Judge Rita Federman gave opening remarks.*



*The Cal Poly Low-Income Taxpayer Clinic offered its services.*



*California Rural Legal Assistance described its programs.*



*San Luis Obispo County's civil grand jury was represented.*

*Continued on page 10*

## Community Law Day continued



*San Luis Obispo Legal Assistance Foundation brought staff ready to assist.*



*LRIS committee members Alexandra Poletti & Amanda Busick offer information.*



*Women Lawyers Association was represented, as was SLO County District Attorney Victim Witness Assistance.*



*San Luis Obispo Superior Court Self-Help Center and Family Law Facilitator's Office offered services.*



*Creative Mediation is a program of Wilshire Community Services.*

# Updates From San Luis Obispo County Unity Bar

by Judge Hernaldo J. Baltodano

The San Luis Obispo County Unity Bar held its inaugural event in October 2023. Themed “Access to Justice: Stronger Together,” we attracted 150 attendees, including judicial officers, lawyers, law students, and community and civic leaders. In addition to breaking bread with Judicial Appointments Secretary Luis Céspedes and Unity Bar leaders from across California, we heard inspiring remarks about increasing access to justice, finding common ground with others, lifting others up, and the qualities that make excellent judicial officers. Those remarks have inspired our members to act.

In February 2024, we partnered with the San Luis Obispo College of Law to host Attorney General Rob Bonta for a dynamic and wide-ranging question and answer session. We thank Gregory Gillett for helping to coordinate. The attorney general met with lawyers from the private and public sectors as well as students. We also attended the Mexican American Bar Association’s annual Gala in Los Angeles, an inaugural Diversity Coalition Women of Color Symposium here at home, and presented at a NAACP-SLO Leadership Retreat.

This year we also organized a civic education field trip for 60 fifth graders and continued coaching and mentoring middle and high school students for the February 2024 SLO County Mock Trial Competition.

Because mentorship cuts to the core of our mission, we also

met with students at Berkeley Law and made ourselves available to mentor first-generation law students at SLO College of Law. We also organized spaces for members of the public to learn about diverse career paths and stories of perseverance in the law. For example, SLO College of Law Campus Dean Erica Flores Baltodano facilitated workshops about pursuing careers in municipal law and building resiliency in the law, showcasing the trail-blazing careers of two Central Coast judges and two local attorneys.

One of our primary objectives is to support worthy candidates for judicial office. Thanks to Commissioner Leslie Kraut’s efforts, we now have a Judicial Endorsement Committee and endorsement process in place. Buoyed by our Judicial Endorsement Chair, Justice Martin J. Tangeman (Ret.), our Judicial Endorsement Committee recently vetted and recommended we support two candidates nominated to the California Court of Appeal: Justice Gonzalo Martinez to Presiding Justice and Judge Natalie Stone to Associate Justice, both in Division 7 of the Second Appellate District. Both were confirmed by the Commission on Judicial Appointments. We are grateful to Judicial Endorsement Committee

members Ginger Ortiz, Gabriela Munoz-Gomez, Nicole Norris, and Charles Cummins for their important work.

We also participated in a Human Library reading at Cuesta College. The Human Library, a concept that originated in Europe, cautions us to “not judge a book by its cover,” and facilitates people from diverse walks of life convening and sharing their personal stories so that they can topple pillars of prejudice. Students “check-out” a human and hear their story in 20-minute listening sessions.

“The Human Library is designed to build a positive framework for conversations that can challenge stereotypes and prejudices through dialogue. The Human Library is a place where real people are on loan to readers. A place where difficult questions are expected, appreciated and answered.” (<https://humanlibrary.org>)

We look forward to seeing you at the San Luis Obispo County Bar Association Summer Social on July 25. ■

---

*Justice Baltodano serves as an Associate Justice for the Second District Court of Appeal, Division 6.*



# A Look Back at San Luis Obispo's Legal Community of Yesterday

by Judge Barry Hammer (Retired)

## Yesterday

I arrived for work at the San Luis Obispo District Attorney Office on July 1, 1963. After passing the bar, I had worked for four months in a 20-storied building in San Francisco's financial district. I met three attorneys when I interviewed in San Luis—they were the only people I knew in the county. It was a completely different legal scene than San Francisco, which has now largely disappeared. That scene deserves to be remembered because our legal community came from it.

## Court System

The court system was two Superior Court judges and five Justice Courts. The Justice Courts had civil jurisdiction up to \$1,000, criminal jurisdiction over misdemeanors and sat as magistrates for the Superior Court for felonies—arraignment and prelims.

One need not be an attorney to sit as a Justice Court Judge. In Paso Robles (1st District) the judge was Roy Fanning, later defeated by Dean McNutt—both laymen. The 2nd district was the Morro Bay Justice Court run by Fred Schenck, an attorney, former Marine and graduate of Ohio State. The 3rd District in San Luis was headed by Paul Jackson, a layman who was legally blind.

In the 4th district, in Arroyo Grande, Gerard Dana was the judge. Dana was a layman, a descendant of the Yankee sea captain William Dana of the Dana

adobe in Nipomo. Judge Dana was a Marine Corps veteran of WWI. In the 5th district in Atascadero, Judge John Burritt was an attorney. He was succeeded by Warren Conklin, who went on to a distinguished career on the Superior Court.

Timothy O'Reilly and Richard Harris were the Superior Court judges. They had 'residual jurisdiction'—everything left over after subtracting Justice Court matters.

Tim O'Reilly was a Democrat, graduate of Santa Clara who had been mayor of San Luis Obispo and run for Congress. As I understand it, he was the second judge, created by legislation and appointed by Governor Pat Brown.

Richard Harris was a Republican. The previous judge had let his term run out and Harris was elected to fill the vacancy, I believe in 1962. Harris was a Boalt Hall graduate and had previously served as a Police Court judge.

The original court was located on the second floor of the courthouse facing the Fremont movie theater. A second courtroom was set up in the Vet's building.

## District Attorney Office

James Powell was the District Attorney, recently elected. Bob Tait, the Assistant, headed up the criminal section with deputies Neil Hovis, myself and later Chris Money. The civil side of the office handled matters now done by County Counsel. On the civil

side were Harold (Bud) Johnson, Scovil Hubbard, Jim Ashe and Bob More. Some of the criminal work was different from the big city. We prosecuted cock fighting, cattle rustling, taking short Pismo clams and shallow water commercial abalone diving. Traffic offenses were treated as misdemeanors, and many jury trials were held on CHP speed tickets.

## The Bar

The bar was exclusively male and there was an auxiliary organization called Law Wives. Firms were mainly two men—an older attorney who handled office matters and Probate, and a younger attorney who did court work.

Some of the firms I remember in San Luis were Davis and Wendt, Grundell and Fredman, Shipsey and Seitz, Andre and Wood, Muller and Woolpert, Renetzky and Murphy, and Lloyd Somogyi. In South County there were David and Gould, Clifford Clark and Crossmann and Weaver. In Morro Bay was Charles Ogle, then Ogle and Gallo. In Atascadero, the one lawyer was Bill Wright. In Paso were Madden and Hart, Woody Eshwig, Lawton Champion.

All court calendars were heard on Monday, so the County Bar would meet at noon at the Motel Inn one Monday each month.

## Law Practice

The County Bar Association compiled a 'Minimum Fee Schedule' in line with State Bar legal ethics that forbade lawyer advertising—charging low fees was viewed as a form of solicitation. The Minimum Fee Schedule was very helpful to young attorneys who often had no idea of what their work was worth. I remember that the basic hourly rate was \$35 per hour, an uncontested divorce \$250, a simple will \$35.

We had no county public defender then, and misdemeanants were not entitled to a court-appointed attorney. As a practice though, the courts would often appoint counsel on a serious misdemeanor. Some of the courts would appoint counsel off a list. However, I saw counsel who happened to be in court on another matter get appointed on a criminal arraignment. We had a very aggressive criminal bar in those days and prelims were almost never waived. One attorney, Harry Murphy, had two convictions out of 10 DUI jury trials he defended.

Before the Family Law Act, family law was started by the plaintiff (usually the wife) filing a complaint for divorce that alleged 'fault,' usually extreme cruelty. If the parties did not agree, the defendant would file an answer denying the accusations and, often, a cross complaint. Fault was an important factor in those days. A 'guilty' spouse could not get alimony—an 'innocent' spouse had to get at least one half of the community property—maybe all in the discretion of the court.

There was a presumption for child custody of younger children in the mother and for the father



when the child was of an age for guidance in career.

In one case, since the wife would not agree, the husband filed for divorce. Lloyd Somogyi, representing the wife, filed an answer denying husband's allegations of extreme cruelty by wife and also filed a cross complaint for separate maintenance. At trial the court found against husband on extreme cruelty and denied the divorce. On the cross complaint, the court found wife had proved extreme cruelty against husband and awarded her separate maintenance—meaning hus-

band was still married and could not remarry. I heard that husband later sweetened the pot and wife agreed to let him get a divorce.

Most lawyers were generalists and handled workman's comp cases, bankruptcy, criminal law, family law, personal injury, wills, probate and business.

The real story is the people—and I hope to say more about them later. ■

# Use “Co-Pilot” to Improve Your Contract Drafting Workflow: A Tutorial for Business Attorneys

by Thomas F. Lebens

**A**s a business attorney, you are constantly looking for ways to improve the efficiency and effectiveness of your contract drafting process, especially when you need to draft a contract of a type you have not drafted before. One tool that can assist you in this endeavor is Microsoft Co-Pilot, a powerful AI (Artificial Intelligence) assistant that can help you generate and improve your contract-drafting workflow.\*\*

In this article, I will guide you through the process of using Co-Pilot to optimize your prompts and generate accurate and relevant contract terms that you can then improve and revise using your expertise as an attorney and knowledge of your client’s business and preferences.

By way of example, let us assume you have or your client has negotiated a term sheet for a sales contract. One approach would be to search through contracts you have drafted and locate a contract with some aspects in common with your desired contract. Another approach would be to search through other examples of contracts, such as from form books or examples you may have collected throughout your career. But, with Co-Pilot coming onto the scene as a tool, you could also ask Co-Pilot to draft a sales contract based on the term sheet.

Using Co-Pilot, as a first step in the workflow, it is important to load the term sheet into Microsoft Word.\* This will provide Co-Pilot with the necessary information to generate relevant contract language. Once the term sheet is loaded, you must prompt Co-Pilot about what you want it to do.

I recommend that every prompt comprise four parts:

- (1) how you want Co-Pilot to act;
- (2) what you want Co-Pilot to act on;
- (3) what you want Co-Pilot to produce;
- (4) an invitation to Co-Pilot to ask questions before it begins work.

Using this format, one prompt might be, “Imagine you are a business attorney. Review this document. Please prepare a sales contract. Ask me any questions before proceeding.”

You can, however, use Co-Pilot to improve your prompt before actually using your prompt. For example, you can ask Co-Pilot to “Act as a prompt engineer and review the following prompt: ‘Imagine you are a business attorney. Review this document. Please prepare a sales contract. Ask me any questions before proceeding.’ Please improve and optimize this prompt. Ask me any clarifying questions before you proceed.”

Co-Pilot will then respond with an optimized prompt, such as, “Imagine you are a business attorney reviewing the provided term sheet for a sales contract between WidgetCo and Gadget, Inc. Based on the information in the document, please prepare a sales contract using the terms in the provided term sheet. If you have any questions or need further clarification, please ask before proceeding.”

With the term sheet loaded into Word, you can then copy and paste the optimized prompt into Co-Pilot to generate the sales contract. You can then edit the sales contract to your satisfaction or prompt Co-Pilot to generate additional terms or different terms.

To illustrate how you can use Co-Pilot to generate a complete contract based on a term sheet, let us consider the following example. Suppose you are drafting a sales contract for a company that sells widgets to another company. The term sheet contains the following information:

- Seller: WidgetCo
- Buyer: Gadget Inc.
- Goods: Widgets
- Price: \$50 per widget
- Quantity: 500 widgets
- Delivery: FOB Seller’s warehouse
- Payment: 30 days after delivery
- Warranty: One-year limited warranty against defects

You can use Co-Pilot to generate a complete contract that reflects this information by prompting it with the prompt you generated above, “Imagine you are a business attorney reviewing the provided

term sheet for a sales contract between WidgetCo and Gadget, Inc. Based on the information in the document, please prepare a sales contract using the terms in the provided term sheet. If you have any questions or need further clarification, please ask before proceeding.”

After prompting Co-Pilot to generate a sales contract, Co-Pilot may respond with something like the following.

**SALES CONTRACT**

THIS SALES CONTRACT (the “Contract”) is made as of the date of the last signature below (the “Effective Date”) by and between WidgetCo, a corporation organized and existing under the laws of [STATE], with its principal place of business at [ADDRESS] (the “Seller”) and Gadget Inc., a corporation organized and existing under the laws of [STATE], with its principal place of business at [ADDRESS] (the “Buyer”).

WHEREAS, the Seller is engaged in the business of manufacturing and selling widgets;

WHEREAS, the Buyer is engaged in the business of distributing and reselling widgets;

WHEREAS, the Seller and the Buyer have agreed to enter into a sales transaction for the purchase and sale of certain widgets on the terms and conditions set forth herein;

NOW, THEREFORE, in consideration of the mutual promises and covenants herein contained, the parties agree as follows:

- 1. Sale and Purchase of Goods
  - 1.1. The Seller agrees to sell and deliver to the Buyer, and the Buyer agrees to purchase and accept from the Seller, 500 widgets (the “Goods”) in accordance with the specifications and quality standards agreed upon by the parties.
  - 1.2. The Goods shall conform to the description, quantity, quality, and other specifications set forth in Exhibit A attached hereto and made a part hereof.
- 2. Price and Payment
  - 2.1. The price for the Goods shall be \$50 per widget, for a total of \$25,000, payable by the Buyer to the Seller in U.S. dollars.
  - 2.2. The Buyer shall pay the Seller the full amount

of the purchase price within 30 days after the delivery of the Goods to the Buyer, by wire transfer of immediately available funds to the account designated by the Seller in writing.

2.3. If the Buyer fails to pay the Seller any amount due under this Contract on or before the due date, the Buyer shall pay the Seller interest on the overdue amount at the rate of [Percent]% per month, or the maximum rate permitted by law, whichever is lower, from the due date until the date of actual payment.

*[Example sections omitted for brevity]*

10. Miscellaneous

10.1. This Contract constitutes the entire agreement between the parties with respect to the subject matter hereof, and supersedes all prior or contemporaneous agreements, understandings, or representations, whether written or oral, relating to the same subject matter.

10.2. This Contract may not be amended, modified, or waived, in whole or in part, except by a written instrument signed by both parties.

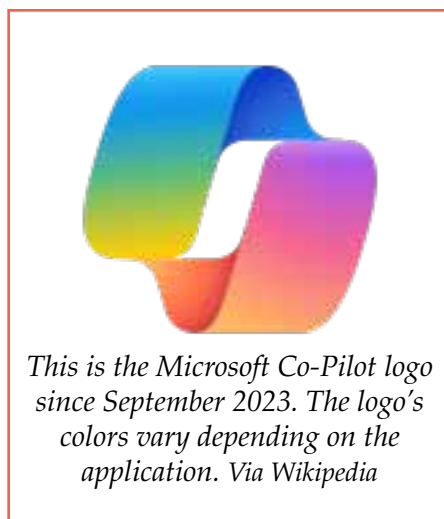
10.3. This Contract may not be assigned or transferred, in whole or in part, by either party without the prior written consent of the other party, except that either party may assign this Contract to

a successor in interest in connection with a merger, acquisition, or sale of all or substantially all of its assets or business, provided that such successor agrees to be bound by the terms and conditions of this Contract.

10.4. This Contract shall be governed by and construed in accordance with the laws of the State of [STATE], without regard to its conflict of laws principles. Any dispute arising out of or relating to this Contract shall be submitted to the exclusive jurisdiction of the state and federal courts located in the State of [STATE], and the parties hereby consent to the personal and exclusive jurisdiction and venue of such courts.

10.5. Any notice or communication required or permitted under this Contract shall be in writing and shall be delivered by hand, by registered or certified mail, by overnight courier, or by email, to the

*Continued on page 16*



## Use “Co-Pilot” to Improve Contract Drafting continued

address or email address of the other party set forth below, or to such other address or email address as either party may designate by written notice to the other party. Such notice or communication shall be deemed to have been given and received: (a) if delivered by hand, on the date of delivery; (b) if delivered by registered or certified mail, on the date of receipt or the date of the first attempted delivery, whichever is earlier; (c) if delivered by overnight courier, on the date of receipt or the date of the first attempted delivery, whichever is earlier; or (d) if delivered by email, on the date of transmission, provided that a confirmation of delivery is received by the sender and that a copy of such notice or communication is also sent by one of the other methods described above.

10.6. If any provision of this Contract is held to be invalid, illegal, or unenforceable, such provision shall be enforced to the maximum extent permitted by law, and the remaining provisions of this Contract shall remain in full force and effect.

Once Co-Pilot prepares the draft agreement, one cannot assume that the document is complete or accurate. Bear in mind that this document is generated by a statistical model that has no conscious understanding of the document it prepared. Thus, it is critical that the attorney carefully review the resulting agreement and then edit and improve it upon the agreement based on the attorney’s knowledge, experience and understanding of the client. However, using Co-pilot to prepare a draft in this

way can save a great deal of time and expense in preparing an initial draft for review and revision. Looking at Co-Pilot as a computerized intern or inexperienced associate may be appropriate.

In conclusion, Co-Pilot is a powerful tool that, when prompted by a well-designed prompt, can assist business attorneys in improving their contract drafting workflow.\*\* Remember, however, that Co-Pilot is not intelligent and will make mistakes. It uses a statistical model to generate output and is, therefore, only capable of generating responses that are “probably right.”

Following the steps outlined in this tutorial, you can use Co-Pilot to optimize your prompts and generate draft sales contract terms. With its ability to generate and improve draft contract terms, Co-Pilot is a valuable asset for any business attorney looking to streamline their contract drafting process. ■

\* Requires Co-Pilot Pro.

\*\* As with any third-party service, particularly cloud-based computer services, it is important to review terms and conditions and provider data handling practices to ensure that your duties to maintain client confidences are fulfilled.

---

*Thomas F. Lebens is a Partner at Fitch, Even, Tabin & Flannery LLP in San Luis Obispo and works in the fields of intellectual property, patent, trademark, copyright, trade secrets and licensing.*

### THE OTHER BAR



Free confidential assistance to lawyers, judges, paralegals and law students with substance abuse problems.

Weekly Other Bar 12-Step Meetings are held in many areas, and others are being established. For times and locations, or to start a meeting in your area, contact the number or website below.

Provider of Certified MCLE Instructors

Confidential Hotline 24 Hours a Day: (800) 222-0767

[www.otherbar.org](http://www.otherbar.org)



# Paralegal Compliance & CCPA Events

by Michelle Egli, CP

The Central Coast Paralegal Association (CCPA) is a not-for-profit corporation founded in 1982 to promote and advance the paralegal profession here on the Central Coast. We are pleased to provide a forum for peers to share expertise and exchange ideas, personal support for the benefit of the paralegal profession, a job board and employment referrals, and multiple opportunities throughout the year to obtain the mandatory continuing legal education (MCLE) as required by California law. CCPA endeavors to offer and promote MCLE opportunities in a variety of subjects at little or no cost to our members.

CCPA also hosts fun social events and mixers to foster connections within the local paralegal community. To that end, CCPA has the following events scheduled this year:

- May 8, 2024 — MCLE Presentation: My Ex Hacked Me—Stalking in Family Law Cases
- June 6, 2024 — Summer Social
- September 11, 2024 — MCLE Presentation: Estate Planning Faux Pa's of the Rich and Famous
- October 19, 2024 — MCLE Half-Day Conference
- December 11, 2024 — Holiday Lunch

## Business and Professions Code Section 6450: Are Your Paralegals in Compliance?

Did you know that all California paralegals are required to comply with Business and Professions Code section 6450, et seq.? California law requires that anyone who represents themselves as a paralegal must possess either 1) a certificate of completion of a paralegal program or 2) a baccalaureate degree or an advanced degree in any subject and a minimum

of one year of law-related experience under the supervision of an attorney. (Bus. & Prof. Code § 6450(c)).

Beginning in 2007, any person working as a paralegal shall be required to certify completion of four hours of mandatory continuing legal education in legal ethics and four hours of mandatory continuing legal education in either general law or in an area of specialized law. This requirement must be met every two years from the date of certification. (Bus. & Prof. Code § 6450(d)). One benefit of having your paralegals join CCPA is that they will have ample opportunity to complete their MCLE requirements and remain in compliance.

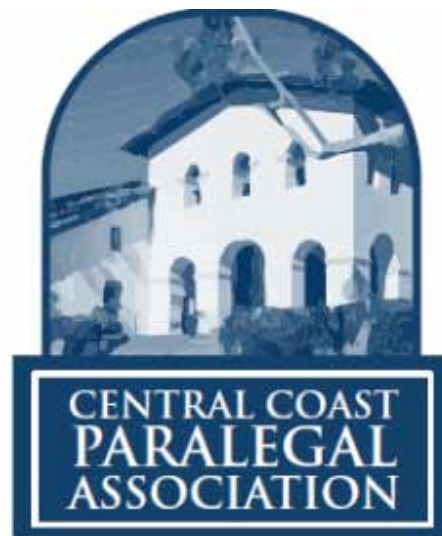
## CCPA'S Resources & Programs

CCPA offers yearly scholarships and personal support to students enrolled in local paralegal study programs. One of our goals this year is to work with the Paralegal Programs at Allan Hancock College, Cuesta College and UC Santa Barbara to reach more students and educate them on CCPA's invaluable resources.

Our members are actively involved in community support by volunteering their time and backing to organizations including the American Legion, the Food Bank, the Women's Shelter, CASA and local Mock Trial programs.

CCPA is hosting its annual half-day conference October 19, where we will offer three MCLE presentations. Topics will include the ethics of billing and confidentiality, trial technology, and how well-being promotes success in law firms. We are excited to welcome the following speakers:

- Victor Herrera, Partner at Carmel & Naccasha, LLP
- Steve Hill, Certified Trial Technician at e-Legal Services



- Robin Oaks, Attorney at Law and Well-Being Consultant

Our half-day conference is open to everyone; you do not need to be a CCPA member to attend. Attendees have the opportunity to earn up to three hours of MCLE credit, including one ethics credit. We would love to have our local attorneys join us!

To learn more about the benefits of CCPA, MCLEs and events, please see our website at <https://ccpaslo.org/> and Instagram at <https://www.instagram.com/ccpaslo/>.

## CCPA Membership

CCPA membership is not exclusive to paralegals; anyone can join. We encourage anyone in the legal community to become a member, including other law office professionals such as file clerks, legal secretaries, paralegal students and law clerks. Please visit the CCPA membership page for more details at <https://ccpaslo.org/membership/ccpa-membership/>.

As with state and local Bar dues, CCPA Membership is deductible as a business expense!

## Special Offer

Now through December 2024, all new members receive 50 percent off 2024 dues! ■

# Do You Want to Learn to Find the Place Where Troubles Melt Like Lemon Drops?

by Kara Stein-Conaway

At the end of 2019, then Bar Bulletin editor Raymond Allen asked me to write a series for the Bar Bulletin for 2020 where I would share my perspective about navigating the various important roles I was balancing in my life as a lawyer, law firm owner, wife, and mama of two young children. In the end of 2020, I was honored to receive the Frank T. Pentangelo Award from the SLO Bar Association in recognition of the contribution I made writing and sharing that series of articles. I was later drawn to create "The Business Mamas Podcast," where I enjoyed sharing stories and tools for practicing more self-care and self-love. The article I'm sharing with you here originated from the 30th episode of the podcast. I hope you enjoy it.

—Kara Stein-Conaway

I am sharing with you a song that I sing to my children at night when I'm putting them to sleep. After I share the song with you, I'll tell you the lessons that I hope to be teaching both myself and my children with the song, and I hope the lessons will resonate with you too.

## "Somewhere Over the Rainbow"

*Somewhere over the rainbow,  
way up high  
There's a land that I heard of once  
in a lullaby  
Somewhere over the rainbow,  
skies are blue  
And the dreams that you dare to  
dream really do come true  
Someday I'll wish upon a star  
And wake up where the clouds  
are far behind me  
Where troubles melt like lemon  
drops  
Away above the chimney tops  
That's where you'll find me  
Somewhere over the rainbow  
Bluebirds fly  
Bluebirds fly over the rainbow  
why then, oh why can't I?  
If happy little bluebirds fly  
beyond the rainbow,  
Why, oh why, oh why can't I?*

"Somewhere Over the Rainbow," sung by Judy Garland, has always been a song that I find soothing, and comforting.

*Somewhere over the rainbow,  
skies are blue*

*And the dreams that you dare to  
dream really do come true....*

**To me, this is about a state of mind and a way of being.**

Once we practice seeing the blueness of the sky that is right before us, then the dreams that you dare to dream really do come true.

But so often, we can stop ourselves from dreaming those big dreams that she sings about at the beginning of this song.

**"Somewhere Over the Rainbow" is such a powerful reminder that you can allow yourself to dream those big dreams!**

*Someday I'll wish upon a star  
And wake up where the clouds  
are far behind me  
Where troubles melt like lemon  
drops....*

Where is the place where troubles melt like lemon drops?

I feel like I have experienced this place in my own life.

**And when I sing this song to my children, it's my hope that they too will come to realize that the place where troubles melt like lemon drops is within your own mind and within your own heart. And that by creating and**



Alaskan rainbow via Community Commons

**nurturing a safe space within yourself, you can always find the place where troubles melt like lemon drops.**

When you develop a practice of observing your feelings, then you can notice your troubles. And in noticing your troubles, you can invite them to be felt, and you can hold space for those feelings.

**In holding space for those feelings and in approaching yourself from a non-judgmental place of love and compassion, we can create those beautiful places within ourselves where troubles melt, like lemon drops.**

**When we encounter those troubles, use our own self-care practices, and find that they are not melting away like lemon drops, we can come from a place of love and compassion and know that we are worthy to reach out to other people to find the support that we need to allow those troubles to melt away.**

*Somewhere over the rainbow*

*Bluebirds fly*

*Bluebirds fly over the rainbow why then, oh why can't I?*

But we can.

But you can.

**You can absolutely fly over the rainbow and into this beautiful place of feeling self-compassion and feeling self-appreciation and feeling a desire to give to and nurture yourself.**

From that place, you can fly.

From that place, you are free.

**When we can count on ourselves to be there for ourselves, we build accountability with ourselves. When we make the promise to ourselves to always comfort ourselves when we feel sad, and then we start showing up for ourselves in that way, it's not just bluebirds that fly; we get to fly too.**

We get to feel that freedom.

We get to dream those big dreams.

You get to dare to dream in a way where you don't shut down that dreaming process; you let it flow, and you let it go wherever it may go. You get to do that because you also know that you are there for yourself to support and nurture yourself when you need that support. You also get to reach out to others when you need more support and nurturing than what it is you are also providing to yourself.

**To me, "Somewhere Over the Rainbow" is a song of opportunity, a song of seeing what is possible, and a song about creating that beautiful rainbow color-filled life that feels so right and so special.**

Know that it's there for you; it's available to you. Know that you can create that life for yourself.

**As a mother, I want my children to feel like little bluebirds that are exploring their hearts' desires, allowing themselves to feel into their creativity, feel into what they are drawn to, and to do what makes them feel alive, happy and on purpose.**

**As I dream of this for my children, and sing them this song, I also hold in my heart from the deepest place and the deepest desire that you, too, will take flight and will allow yourself to dream big.**

**Feel that freedom of going after and doing what it is your heart is calling you to do, knowing that if you fall or if you need a rest and if you need a place of comfort and compassion, that you get to be that place for yourself.**



*Photo courtesy of Kara Stein-Conaway*

You can sing yourself "Somewhere Over the Rainbow" or come up with other ways that feel good to you to remind yourself that you are always that special, safe place where troubles melt like lemon drops. ■

---

*Kara Stein-Conaway is the owner and managing attorney for the Stein-Conaway Law Firm, P.C., where she, Attorney Jeff Stein and their team help adults accused of crimes in SLO County protect themselves and their futures with their criminal defense law practice.*

*"At the Stein-Conaway Law Firm, P.C., we are revolutionizing criminal defense practice by integrating therapeutic principles into our legal defense strategies. We turn adversities into opportunities for growth, healing, and positive change. We offer our clients legal representation and customized therapeutic resources to support them on their healing journeys. You can learn more about our practice at [www.steinconawaylaw.com](http://www.steinconawaylaw.com)."*

Independent | Professional | Experienced

# Business Valuation Specialists

**Shannon Lowther**

CFA, ASA, ABV  
Shannon@CentralPacVal.com



- Estate & Gift Tax Valuations (Forms 706 & 709)
- Business Transactions & Advisory

**Kevin Lowther**

ASA, ABV, FMVA  
Kevin@CentralPacVal.com



- Buy-Sell Agreements
- Shareholder Transactions
- Management Buyouts



**CENTRAL PACIFIC  
VALUATION**

**805 585 5760**

Santa Barbara | Fresno | Bakersfield | [CentralPacVal.com](http://CentralPacVal.com)

# TARDIFF LAW OFFICES

— APPELLATE ADVOCACY GROUP —



**NEIL S. TARDIFF**  
**ATTORNEY**

Certified Specialist in Appellate Law,  
State Bar of California

- Specializing in Civil, Criminal and Administrative Appeals and Writs - State and Federal
- Offering Trial Consultations, Settlement Evaluations and Drafting of Pre-trial and Post-trial Motions
- Providing Attorneys, Corporate, Government and Individual Clients with Excellent Litigation and Appellate Advice
- Over 25 Years of Extensive Trial and Appellate Experience in State and Federal Courts



P.O. BOX 1446 • SAN LUIS OBISPO, CA 93406  
PHONE: 805-544-8100 • FAX: 805-544-4381 • E-MAIL: [Neil@TardiffLaw.com](mailto:Neil@TardiffLaw.com)



## Your Expertise Is Needed in These Areas...

- Family Law
- Traffic
- Education Law
- SSI Appeals
- Workers' Compensation

The Lawyer Referral & Information Service (LRIS) has an urgent need for attorneys who practice in the above areas and are looking for potential (paying) clients.

If you are interested in pre-screened, quality referrals, please call Kerrin Adams at (805) 541-5502.

**STEIN-CONAWAY**  
LAW FIRM, P.C.



**Attorneys Kara Stein-Conaway and Jeff Stein**  
at the Stein-Conaway Law Firm, P.C. offer individual attention and creative solutions in a wide variety of adult criminal matters in SLO County:

- Domestic Violence & Violent Crimes
- DUIs & License Suspensions
- Reducing Felonies to Misdemeanors
- Sealing Records of Arrest and Expungements
- Post-Conviction Relief for Immigration Purposes
- Theft and Embezzlement
- Drug Charges
- Terminating Sex-Offender Registration

**Se Habla Español**

**Stein-Conaway Law Firm, P.C.**  
1045 Mill Street, San Luis Obispo, CA  
805-748-5243 • [www.steinconawaylaw.com](http://www.steinconawaylaw.com)

You're Invited to the SLO County Bar Association's

# Summer Social

**BIDDLE RANCH WINERY**

5:30–8:30 p.m. Thursday, July 25, 2024  
Biddle Ranch Winery  
2050 Biddle Ranch Rd., San Luis Obispo

This year's event focuses on raising tax-deductible donations for the SLCOBA Endowment Fund that provides education scholarships to persons of color who have a demonstrated interest in the legal profession. The Fund was established to broaden the number of traditionally underrepresented groups employed in the legal profession with the goal of providing greater access to, and inclusion in, the legal system.

The 2024 scholarship recipient, **Israel Pérez Pedraza**, is invited to attend, along with recipients from past years.

The Endowment Fund, administered by The Community Foundation San Luis Obispo County, has presented scholarships since 2021.

Please join us for a good time while raising funds for this significant cause!



2021 Summer Social at Biddle Ranch Winery.



## 2024 SCHOLARSHIP RECIPIENT ISRAEL PÉREZ PEDRAZA

"Hi everyone, I'm Israel Pérez Pedraza, a first-year Political Science student with a concentration in Pre-Law and a Spanish double major at Cal Poly San Luis Obispo.

My journey has been shaped by personal challenges and a deep commitment to social justice. After facing and overcoming adversity in my own life, I'm dedicated to helping others, especially children, find safer and more accepting homes.

I currently work at the San Luis Obispo Food Bank, Allegretto Vineyard Resort, and TASTE! Craft and Eatery. My future aspirations include pursuing a career in law to advocate for individuals facing toxic home environments and ensuring they receive the support they need to thrive.

In recognition of my efforts within the LGBTQIA+ community, I have been honored with a Senate Resolution bill. Additionally, I am deeply involved in relieving hunger for low-income and homeless communities in San Luis Obispo County. I collaborate with various organizations to advocate for justice and fight against discrimination and hate."

**LIVE MUSIC—  
HILARY WATSON**

**FOOD TRUCK—  
HUNGRY MOTHER**



Photo courtesy of Christine Woo.

**2024 SUMMER SOCIAL  
SPONSORED BY**

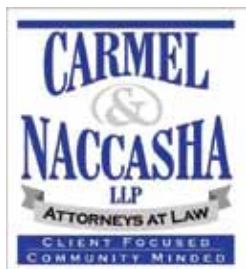


**SPECIAL THANKS TO SPONSORS  
& EARLY DONORS**

**SLOCBA Estate & Trust Section**

**SLOCBA ADR Section**

**Judge Matthew Guerrero & Cynthia Valenzuela**



**Tickets**

**Members: \$40 per ticket  
Non-Members: \$60 per ticket**

**Ticket price includes**

- Hungry Mother Food Truck
- One drink ticket
- Live Music by Hilary Watson (@hilarywatson-music on Instagram)

**Purchase tickets at**

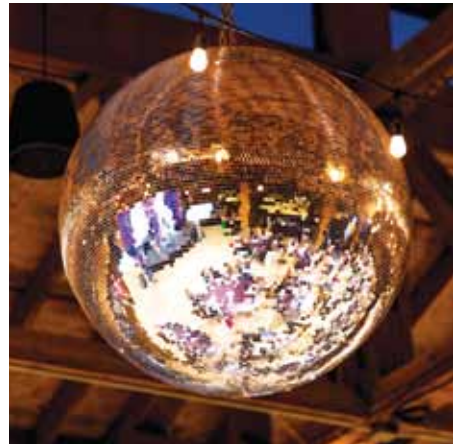
**<https://slobar.org/events-calendar/#!event/register/2024/7/25/slocba-2024-summer-social>**

# Having a Ball (a Disco Ball!) ‘til the “last Dance”

by Donna Jones, SLOLAF Executive Director

Photos by Erick Wand, E. Wand Photography,  
Erick@GraphicsByErick.com

What better way to follow up last year’s Hippie Dippie Groovy gala than to groove into the disco era? On April 27, San Luis Obispo Legal Assistance Foundation (SLOLAF) transformed Thousand Hills Ranch in Pismo Beach into a dazzling disco with its “Boogie Fever” event, inspired by the movie “Saturday Night Fever.” With 225 guests decked out in their best disco attire, the night was a fundraising success, blending nostalgia and charity in perfect harmony.



Upon arrival, guests were greeted with sparkling prosecco served by volunteers dressed in glittering outfits. Disco tunes filled the air as foxy mamas and casanovas mingled, sipped drinks from the indoor and outdoor bars, savored passed appetizers, and tried their luck with raffles and games of chance. The photo booth from Pix & Flix became an instant hit, capturing guests in their flared pants, gold necklaces, jumpsuits, ‘70s mustaches, and feathered hair or afros.

The outdoor patio area was a hub of activity. A gust of wind added an element of surprise, dramatically taking out a weighted tent, but the festive atmosphere remained unshaken. Guests found their way to the “Glitter Ball Wine Raffle” for a chance to win 52 unique bottles of wine. Participants eagerly awaited the draw, hoping their card from the deck would be chosen. New this year was the “Take Me Home Magnum Raffle,” where one winner walked away with five magnums from Tolosa, Perinet, Desparada, Derby and Stephen Ross. The “Blame It on the Boogie Game of Chance” delighted participants with gift





cards or bottles of wine for those who chose a winning envelope number. Inside the barn, volunteers sold raffle tickets for the "Night Fever Mystery Prize Raffle," with three guests winning prizes each worth at least \$500, including a trip!

The silent auction was a hotspot for those who love the thrill of competition and snagging a bargain. Sixty-three items awaited their winners, offering everything from golf outings to restaurants and show tickets, unique experiences, and hand-crafted jewelry and art pieces. And, of course, plenty of wine!

Pre-dinner, emcee Adam Montiel and SLOLAF Executive Director Donna Jones took the stage to draw winners of the "Night Fever Mystery Prize Raffle." Excitement peaked as the prizes were revealed—a wine suitcase packed with wine, two nights at a local Airbnb, and a trip to The Redwoods at Yosemite—not bad for a \$50 raffle ticket purchase!

Dinner, catered by Taste Craft Eatery & Catering, featured a sumptuous spread that satisfied every palate. The menu included pepper-crusted sirloin, herbed chicken, scalloped potatoes, roasted root vegetables, Taste's famous brussels sprouts and spring spin salad, Caesar salad, and local breads. The bar, managed by Bottles & Ice Bar Service, served local wines, beers and two specialty cocktails, including a cranberry gin and tonic with delicious cranberry gin from local distillery Calwise.

After dinner, Montiel invited Jones back to the stage to kick off the program. Jones welcomed all, and thanked myriad donors, volunteers and vendors who made

*Continued on page 26*



## Having a Ball continued



the event possible. The event's 27 sponsors received special recognition for their crucial contributions to the event.

For guests having their first experience with SLOLAF, Jones explained it is essentially a non-profit law firm. SLOLAF's clients, however, are low-income SLO County residents who cannot afford traditional legal remedies. SLOLAF offers its services for free to these clients, and in turn is funded by grants and fundraising. SLOLAF is 90 percent grant funded, with the remaining 10 percent of its revenue provided by fundraising, like this event and private donations. The generosity of our funders and the community allows SLOLAF to do the work it does.

A short video showcased the impactful stories of three SLOLAF clients, alongside heartfelt testimonials from staff members about their rewarding work. After the video, Jones introduced the SLOLAF staff and volunteer attorneys who work daily in areas such as landlord/tenant law, elder law, family law, eviction defense, government benefits appeals, conservatorships and guardianships of the person, consumer debt, foreclosure



prevention and veteran services. The dedication and hard work of these individuals were evident, earning them a round of applause from the audience. SLOLAF Board President Khoulood Pearson echoed Jones’s sentiments and extended gratitude to the all-volunteer Board of Directors for their guidance and support.

The evening included a special recognition of Ray Mattison, recipient of the 2024 SLOLAF Ambassador Award, honoring his generous support and numerous contributions to SLOLAF, the SLO County legal community and the SLO County community at large. Jones shared insights from Mattison’s previous business partner, Don Ernst, highlighting his achievements and philanthropic spirit. Mattison’s humility and dedication were evident as he accepted the award, expressing his gratitude and commitment to continuing his support for SLOLAF.

With the presentations concluding, it was now time for live auction fun with Auctioneer Todd Ventura and Emcee Adam Montiel, starting with SLOLAF’s famous Dessert Auction. SLOLAF loves to auction desserts that feature SLO County restaurants, and this night was no exception with desserts from Taste, Hapy Bistro, The Spoon Trade and Avila Valley Barn, along with an amazing homemade coconut cake. We knew guests were ready to bid when the Basque Style Cheesecake from The Spoon Trade in Grover Beach went for \$1,100!

After everyone’s sweet tooth was satisfied, Ventura began the live auction, with 12 curated experiences, trips and more. Attendees bid on a “Year of Self Care,” a Breckenridge ski trip, tickets to “Wicked” in San Francisco, Dodger tickets, a magnum



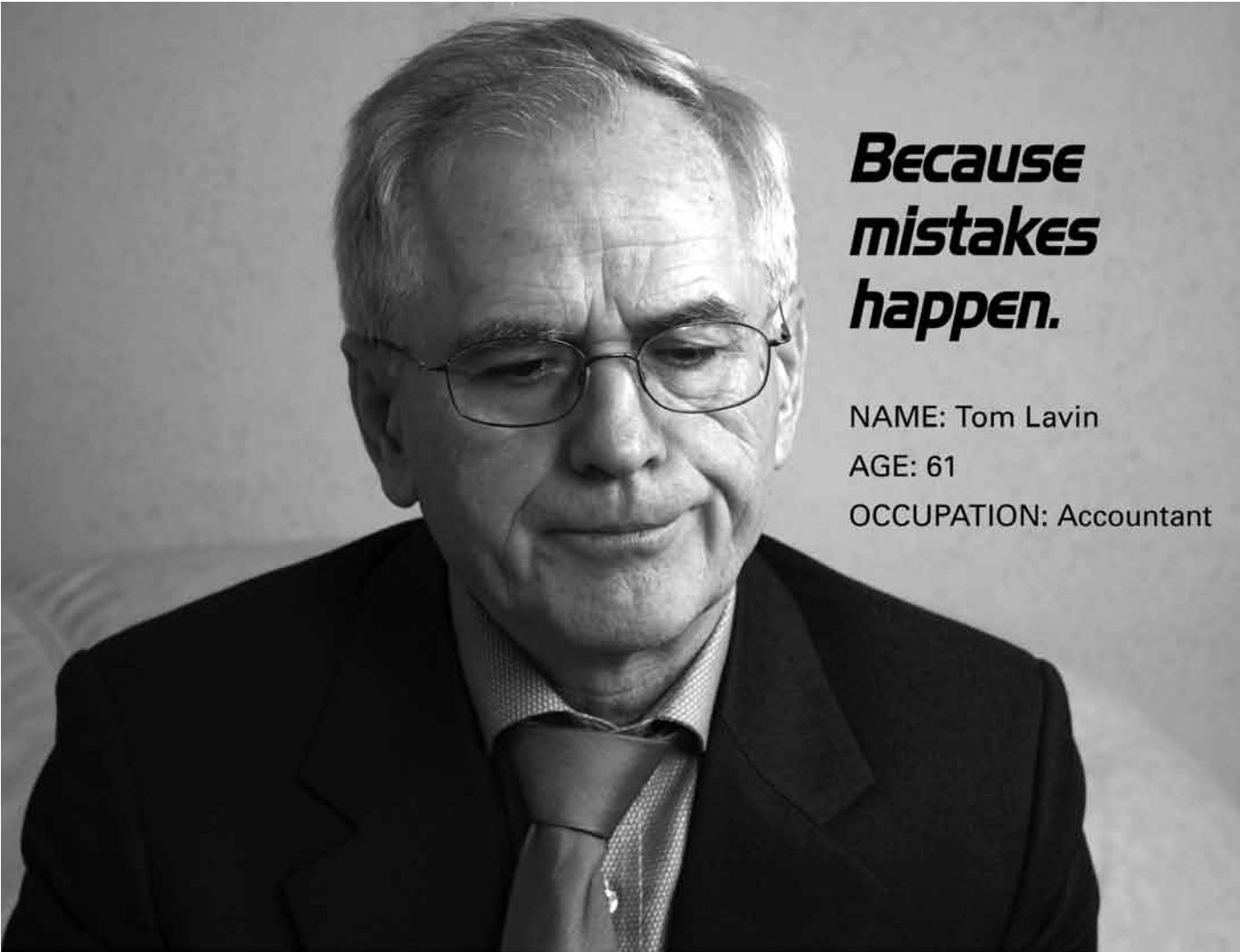
*Ray Mattison, right, recipient of the 2024 SLOLAF Ambassador Award, recreates a pose with former business partner Don Ernst, left, similar to a 1980 photo of them on the porch of their new law office.*



of coveted Saxum wine, a private shopping experience at Ambiance, a Sichuan dinner party, a Sacramento River fishing trip, and trips to Mexico and Sydney, Australia. The live auction culminated with the ever-loved SLOLAF Lobster Boil dinner for 12, sold twice again this year for even more than last year!

After the energy of the live auction, we had a special treat. During the video earlier in the evening, one client shared her story, telling viewers how her SLOLAF attorney was her “David” fighting against her “Goliath.” We were thrilled that this client was in attendance at

*Continued on page 29*



***Because  
mistakes  
happen.***

NAME: Tom Lavin

AGE: 61

OCCUPATION: Accountant

Sometimes bad things happen to good people. If your client needs to post bond, give us a call. We offer the most professional, confidential and honest service on the Central Coast. And we even give attorneys an 8% rate on referrals.\*

**Gregory L. Sullivan, Owner**

Insurance Bail Lic. #BA1674186

**Cell (805) 441-0762**

948 Santa Rosa St., San Luis Obispo, California

*Across from the courthouse*

\*Conditions apply.



**(805) 544-1000**

**[www.bailbondsabc.com](http://www.bailbondsabc.com)**



## Having a Ball continued

the event and invited her to come to the stage with her attorney, Leesa Andrade, to speak first-hand about how SLOLAF helped her. In her words, "SLOLAF is dynamite."

Jones then followed up with some somber notes about funding cuts that are looming with some of SLOLAF's grants. Homelessness Prevention funding is ending in December 2024, and no replacement grants have been identified by the funder. This will impact our housing and government benefits programs. SLOLAF is already experiencing pain points in losing Victims of Crime Act (VOCA) funding. VOCA was cut 44.7 percent at the federal level, with the domino effect that states are now cutting funding for the organizations and agencies that support victims of crime.

In SLO County alone, \$2 million in grant funding is going to be lost annually, affecting SLOLAF and Lumina Alliance, both of which serve survivors of intimate partner violence, sexual assault and stalking, along with Court Appointed Special Advocates (CASA) for abused or neglected children and the District Attorney's Victim Witness program.

This loss of funding is devastating for those in our county who need these services. Jones encouraged guests to be generous in light of this dire situation. Ventura then asked the crowd to raise their paddles in financial support of SLOLAF's work. Many paddles were raised, bringing in unrestricted funds that SLOLAF will use to help fill the gaps caused by these funding cuts.

The evening concluded on a celebratory note with the drawing of winners for the "Glitter Ball



Wine Raffle," the "Take Me Home Magnum Raffle," and the second chance drawing from the "Blame It on the Boogie Game of Chance." Guests enjoyed more music and dancing and headed home with songs like "Boogie Oogie Oogie," "Last Dance" and "Stayin' Alive" ringing in their ears.

As guests departed, many expressed their eagerness for next year's event, already imagining the theme and planning their outfits. The evening not only provided critical funding for SLOLAF but also strengthened bonds within the community, reminding everyone of the collective effort required to make a difference.

Thanks to the generosity of sponsors, donors and attendees, Boogie Fever raised approximately \$150,000, ensuring that SLOLAF can continue providing crucial legal services to those in need. The disco may end, but the impact of this night will resonate far beyond the glitter and grooves. The night was filled with joy, laughter and a shared commitment to justice—a true celebration of the spirit of SLOLAF and the community it serves. Here's to many more successful events and the continued support of SLOLAF's mission to provide legal assistance and resources to people in need. ■

# BAR BULLETIN SUBMISSION GUIDELINES

## Editorial Policy

Contributors are encouraged to limit the length of their submitted articles to 2,500 words or less, unless the article can be published in two parts in successive issues. Lengthy lists of footnotes or citations should be incorporated into the the article.

Editorial contributions to the *Bar Bulletin* must be submitted electronically **ONLY** in Microsoft Word format directly to the 2023 Editor at [tarajacobi@icloud.com](mailto:tarajacobi@icloud.com)

**To ensure consideration for inclusion in the next scheduled edition, your articles, photographs and art, advertisements and ad payments must be received by the deadines listed in the Publications Schedule at right.**

The *Bar Bulletin* reserves the right to reject or edit any contributions. By submitting contributions for publication, contributors consent under this policy to the editing of their work, the publication of their work and the posting of their work online.

The San Luis Obispo County Bar Association does not pay contributors for their submissions.

Opinions expressed in the *Bar Bulletin* do not necessarily reflect those of the San Luis Obispo County Bar Association or its editorial staff. The *Bar Bulletin* does not constitute legal advice or a legal resource and must not be used or relied upon as a substitute for legal counsel that may be required from an attorney.

## Photograph/Artwork Policy

Your submission of photographs/artwork to the *Bar Bulletin* authorizes their publication and posting online. All photographs must be submitted in jpg or tif format with a resolution of not less than 300 dpi via email or, for large files, via WeTransfer. Please include the photographer’s name and that you have permission to use the photograph.

## Publication Schedule

The *Bar Bulletin* is published six times per year. **The deadlines for accepting articles, photographs/art, advertisements and ad payments follow.**

ISSUE	DEADLINE
• January–February	11/25
• March–April	1/25
• May–June	3/25
• July–August	5/25
• September–October	7/25
• November–December	9/25

## Advertisement Policy

All advertisements in the *Bar Bulletin* must be submitted in jpg, tif or pdf format with a resolution of not less than 300 dpi.

Flyers or announcements for the opening, closing or moving of law practices, upcoming MCLE programs or other events put on or sponsored by organizations other than the San Luis Obispo County Bar Association are considered advertisements, and therefore they are subject to this policy and to all applicable advertising rates.

Information on advertisement sizes and rates can be found online at [www.slobar.org](http://www.slobar.org). All advertisements should be prepared prior to publication.

**Contact Kerrin Adams at (805) 541-5930** to reserve advertising space and arrange payment.

**2024 Bar Bulletin**  
*Tara Jacobi, Editor*  
[tarajacobi@icloud.com](mailto:tarajacobi@icloud.com)



## HAVE AN ARTICLE FOR THE COUNTY BAR ASSOCIATION’S BULLETIN?

**Do you know that writing an article for the Bar Bulletin counts toward CLE credits?  
Please email article ideas or articles for consideration in Word format to Tara Jacobi  
at [tarajacobi@icloud.com](mailto:tarajacobi@icloud.com).**

**DEPOSITION SERVICES**

**WE ARRANGE THE COURT REPORTER,  
 VIDEOGRAPHER and ZOOM**



Let us record the deposition and sync the video to the transcript for clip creation to be used in trial.

- **Depositions**
- **Focus Groups**
- **Mediations**
- **Trial Service**



SERVICE OF PROCESS



COURT SERVICES



SUBPOENA PREPARATION



IMAGING SERVICES



TRIAL TECHNICIAN

**CONFERENCE ROOM RENTAL**

444 Higuera Street, Suite 100 • San Luis Obispo, CA 93401  
 P: (805)439-1800 • F: (805) 888-3985 • E: admin@elegalservicesinc.com

**[www.elegalservicesinc.com](http://www.elegalservicesinc.com)**

# TRIAL CONSULTS

- ✓ Member Inner Circle of Advocates limited to 100 of the best Trial Lawyers in America
- ✓ Recognized 14 times by peers as Outstanding Trial Lawyer
- ✓ 5 times Central Coast Trial Lawyer of the Year
- ✓ 100 million dollars in verdicts and settlements



"Jude is one of America's finest! If I needed help, I would search out Jude Basile." Gerry Spence, Legendary Trial Lawyer

**Jude Basile**

of Counsel Gomez Trial Attorneys

Available for select cases as referral or cocounsel  
Referral Fees paid pursuant to State Bar Rules

PHONE 805.909.8113  
[www.basilelaw.com](http://www.basilelaw.com)



Civil Cases Mediated  
with Civility  
**Andrew Weiss**

Providing expert mediation services for all civil matters, from simple two-party disputes to complex multi-party cases, in-person or via Zoom.



**Serving California's Central Coast and Beyond**

*Named a Southern California Super Lawyer in ADR Four Years in a Row*

☎ 805-709-0304

✉ [arweiss03@gmail.com](mailto:arweiss03@gmail.com)

🌐 [arweissmediation.com](http://arweissmediation.com)