



# Virtual Paralegal

June 2011 Newsletter Magazine™



## Cordina's Journey on Re-Launching her Virtual Paralegal Firm

*Look Inside!*

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**Please Sign My Name... NOT!**

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# Virtual Paralegal Newsletter Magazine™



## A Letter from our President

Hi Everyone:

We have finally made it through our first attempt to upgrade our newsletter to a magazine format. We are aware that we have a lot of work to do and there is still a lot more for us to learn before we will achieve our goal. However, we are confident that with the support of our readers and subscribers we know we can do it.



*Cordina Charvis, President*

I am happy to say that we have received many positive feedbacks as well as some constructive suggestions on how to improve the magazine. Our commitment is to take all your suggestions into consideration and to do our best to deliver on our promises by creating a magazine that will be of benefit to you and your business.

I am equally excited about this issue, especially because we have been very fortunate to have the support and contributions of top paralegals and assistants in the industry. I also included one of my journal entries that gave you a peek into my journey on starting and closing my virtual paralegal business and the steps I took to re-launch it.

Michelle Heigelmann, Owner and Founder of Houston Virtual Paralegals contributed a great article entitled, [A Well Thought-out Database Can Assist in Your Law Practice](#). Jenna Borum, Owner of Generate Legal, LLC offered some great tips that you may suggest to your boss/client to help them to communicate what they expect from you as their virtual paralegal or assistant. The co-host of The Paralegal Voice, Vicki Voisin, gave us some solutions on how to handle an ethical situation in her article; [Please Sign My Name...Not!](#)

Cathy L. Ribble, CP, Owner of Digital Paralegal Services, LLC was very kind in contributing her blog post entitled, [Virtual Paralegals: Virtual paralegals are often highly specialized](#) where she outlined some of the benefits of working with virtual paralegals. Victoria Ring, Developer of My Bankruptcy School revealed one of the current bankruptcy scams associated with loan modification in her blog entitled, [The Low Cost Bankruptcy Filing Scam Revealed](#).

Overall, I believe that this issue is a great marketing tool for virtual paralegals and assistants to include in their marketing package to their potential clients. It is also a great resource of information you may consider forwarding to your current clients to remind them of the value of working with you.

I hope you enjoy reading this issue and we look forward to your comments and suggestions as well as your contributions.

Thank you for your support.

Sincerely,  
Cordina Charvis  
Virtual Paralegal Training Center™  
President

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*Contributors:*

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- [Generate Legal, LLC – Jenna Borum](#)



- [Digital Paralegal Services, LLC – Cathy L. Ribble](#)



- [Chapter 7 and 13 Bankruptcy Blog – Victoria Ring](#)



- [The Paralegal Mentor – Vicki Voisin](#)



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## A Well Thought-Out Database Can Assist in Your Law Practice

By: Michelle Heigelmann  
[www.houstonvirtualparalegals.com](http://www.houstonvirtualparalegals.com)

Not all small law firms and solo practitioners use case management software (“CMS”), but a well thought-out database can increase efficiency and provide useful analytics in your practice.

In the late fall of 2009, the University of Florida’s Legal Technology Institute (“LTI”) published its Case, Matter and Practice Management Software Study (the “CMS Study”). The study was developed to form a better understanding of how case, matter and practice management software can improve legal services, to understand how such technologies are used and to anticipate trends in such technologies.

The CMS Study received 341 completed and qualified surveys that contained 75 questions. Among the significant findings of the study are:

One third of the respondents use CMS software, an increase from the 25% reported in LTI’s study conducted in 2000.

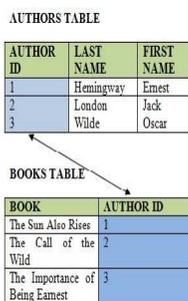
The most common reason provided for purchasing a CMS (70%) is “to become more efficient”.

More than half (55%) of respondents indicated that having a document management system (DMS) functionality in a CMS was important.

Two of the biggest reasons law firms do not integrate CMS into their practice are 1) integration issues and 2) cost. However, smaller scale alternatives do exist that provide some of the more compelling attributes of a CMS with less disruption to normal law practice activities and significantly lower cost.

In particular, a number of widely available consumer-level database programs are available that can provide powerful ways of storing, organizing and utilizing data. Microsoft Access 2010, Filemaker’s FileMaker Pro, and Alpha Software’s Alpha Five v10 are three relational databases that quickly come to mind.

“What is a relational database?” you ask. A relational database is an object-oriented database, or a set of tables that contains pre-defined data categories in one or more columns. The data in the table is stored in rows, each containing a unique piece of information. Each table in the database relates to another table in the database by a common column or field. This common denominator, if you will, allows data to be extracted from each table into a new table via a query, while allowing the original tables to maintain unique sets of data and avoid redundancy.



For example, the two above tables are related through the “Author ID” field in each of the tables. We can see who wrote *The Sun Also Rises* in the Books Table by its relationship to the corresponding field in the Authors Table.

If you take this a step further and imagine a database with many tables containing different types of information and different types of “common denominators”, you can see that a relational database can be a very powerful tool, indeed.

A great deal of thought must go into the structure of a database. First and foremost is what information will be maintained and how it will be linked. Then consideration must be given to how the data will be viewed, what queries you will need for the functions you want to perform and the design of reports for the information you want to manage.

There are basics that guide the database design process. First is that redundant or duplicate data is not good because it takes up space and increases the likelihood for errors and inconsistent data, the second principle is that of “garbage in, garbage out”. If the database contains erroneous, inconsistent or duplicate information, any reports derived from that erroneous information will be incorrect as well, resulting in misinformed decisions, or worse, the possibility of missed deadlines.

A good database design is, therefore, one that:

- Divides your information into subject-based tables to reduce redundant data.
- Provides your database software with the information it requires to join the information in the tables together as needed.
- Helps support and ensure the accuracy and integrity of your information.

Thus, relational databases for small law firms can contain contact and case information that can be queried and used in a number of useful functions. For example:

- Data resulting from queries could be used as a data source for a number of so-called “mail merge” documents. For example, pleadings, discovery and correspondence could all be drafted from information queried from the database, used in conjunction with your word processing program.
- The ability to query the database for the number of cases you have with any particular opposing counsel, or the number or even type of case in a particular court.
- Case loads among attorneys and staff can be analyzed if that information is maintained in the database.
- Trial dates can also be maintained in the database so that trial lists can be run, enabling better docket management;

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Trial dates can also be maintained in the database so that trial lists can be run, enabling better docket management; Other deadlines could be maintained as well, such as deadlines for responding to incoming written discovery, or deadlines for expert designations or trial preparation orders due for any specified period of time.

Information in databases is also easily updated via a query. For example, if Joe Smith, the opposing counsel in 20 cases that you handle decides to retire and Bob Brown is now the new counsel of record, the information for Bob Brown can easily be updated within the database and your database is representative of the most current information for those cases.



*About Michelle Heigelmann: Michelle is the owner/founder of Houston Virtual Paralegals. Michelle has been a paralegal for 20 years, specializing in litigation. Houston Virtual Paralegals | Email: [information@houstonvirtualparalegals.com](mailto:information@houstonvirtualparalegals.com) | <http://www.houstonvirtualparalegals.com/>*

## Where do attorneys and business owners find virtual paralegals and assistants for hire?



There are several ways an attorney or business owner may find virtual paralegals and assistants including the traditional placement agencies. Virtual paralegals and assistants advertise their services using social media such as: Craigslist, [Facebook](#), [Twitter](#) and [Linked In](#) among other social networking websites. Most virtual paralegals and assistants have a business website and others have created blogs.

[Virtual Paralegal Training Center™](#) provides a [virtual paralegal directory](#) where attorneys may browse free of charge to be connected with virtual paralegals and assistants in their practice areas throughout the world.

Another way for attorneys and business owners to be connected with virtual paralegals and assistants is to [submit](#) job postings with the [Virtual Paralegal Client Services™](#) and interested candidates will contact them directly.

Whatever method an attorney or business owner uses to be connected with virtual paralegals and assistants, it is their responsibility to make sure they use the same due diligence as they would for a paralegal/assistant working in their office.

## Ethics Tip: Please Sign My Name...NOT!

By: Vicki Voisin

<http://www.paralegalmentorblog.com>



**Consider this scenario:** You have been employed as a paralegal for the same attorney for several years. He happens to be out of town taking depositions.

**A deadline looms...a document absolutely has to be filed with the Court by 5:00 o'clock.** No problem, you think. Your boss is expected back in the office by 3:00 so that will allow plenty of time for him to review the final draft, sign it and for you to file it with the Clerk before closing time.

**Then you get the dreaded call.** The attorney has been held up and won't be back in the office until the next morning. But what about the filing deadline? "No problem," he says. "Go ahead and sign my name."

### What should you do?

- A. Sign the document, make copies and rush to the Court House?
- B. Remind your employer it's unethical for you to sign his name to a pleading?

**Do tell me you chose 'B'!** This is the correct answer...the ethical answer. Signing your employer's name to the document constitutes the unauthorized practice of law. Only the attorney of record has the authority to sign a pleading. You cannot sign your employer's name (or your own name) even at his direction. Here's the reasoning behind this statement.

**This issue is generally addressed in each state's Court Rules.** For instance, the Michigan Rules of Court at 2.114 states that every document of a party represented by an attorney shall be signed by at least one attorney of record. Similar language is found in the Nevada Rules of Court at Rule 11(a).

**Let's take this one step further by reviewing the Model Rules of Professional Conduct.** ABA MRPC 5.5 deals with the unauthorized practice of law and states that an attorney shall not assist a person who is not a member of the bar in the performance of any activity that constitutes the unauthorized practice of law. Further MRPC 5.3 refers to an attorney's responsibilities regarding non-lawyer assistants and states that an attorney shall be responsible for conduct of such a person that would be a violation of the rules of professional conduct if engaged in by an attorney if the attorney orders or ratifies the conduct.

**The ABA and many states have adopted Model Guidelines for the Utilization of Paralegals.** These guidelines generally state that an attorney may ethically assign responsibility to a paralegal for the performance of tasks related to the representation of a client and the law firm's delivery of legal services, commensurate with the experience and training of the paralegal and where the attorney directly supervises the paralegal and reviews the paralegal's work product before it is communicated outside the law firm.

**The following is a direct quote from the Comments attached to Guideline 2 of the Guidelines for the Utilization of Legal Assistants adopted by the Connecticut Bar Association:** A legal assistant may not appear in court to plead, to try cases, to argue on behalf of another person, or to sign pleadings, except as expressly permitted by statute, court or administrative agency regulation. This does not, however, prohibit a legal assistant from signing documents as a witness or notary public, or in some other non-representative capacity.

**How can you ethically handle this situation?** If there is more than one attorney in the firm, another attorney may sign on behalf of the absent attorney.

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**How can you ethically handle this situation?** If there is more than one attorney in the firm, another attorney may sign on behalf of the absent attorney.

If you work for a sole practitioner, it's possible that the Clerk will allow you to file an original document with a faxed signature page. The document could then be sent by fax or e-mail to the attorney for his review. If it met with his approval, he could sign and fax back the signature page. You would file the page with the original signature as soon as it is available.

Still, you may be out of luck if you're filing a motion because often Clerks will only accept a motion bearing original signatures. In more and more instances, electronic filing is allowed. Still, the attorney must review the work product before it is filed.

**Should your firm adopt the attitude that "no one will ever know" if you sign the attorney's name to the document?**

The answer is NO! Please remember that there are sanctions for violations of the Court Rules. In addition, attorneys have a duty to supervise their employees and to be certain that their actions are ethical. Again, the duty to supervise includes the review of all documents before they leave the office.

**Of course there is an exception!** In 2006 the North Carolina State Bar issued Ethics Opinion 13 stating that an attorney may allow a paralegal to sign his name to court documents so long as it does not violate any law and the attorney provides the appropriate level of supervision.

This is to be done only under exigent circumstances when the attorney is not available and no other attorney in the firm is able to do so. Again, this is for emergency purposes only and applies only to paralegals working in North Carolina.

**There are other instances where you should refuse to sign your name (or someone else's) to a document.** Be especially careful when you're witnessing or notarizing someone's signature. It's unethical and illegal to sign as a witness to a signature unless you actually see the person sign. Further, you must be certain of the identity of the person signing the document. Is it really Jane Doe? Imagine your embarrassment (not to mention the legal ramifications) of having to tell a Judge, "Yes" that's your signature as a witness to a wife's signing a mortgage but "No" you did not actually see her sign it!

**Another area where you should use caution is the signing of correspondence on behalf of your firm.**

You must be sure that any correspondence signed by you clearly identifies your status as a non-lawyer and covers only information or procedure. Providing legal advice is the responsibility of the attorney. If you sign a letter that contains legal advice, you will be committing the unauthorized practice of law.

**Your challenge:** Remember that signing a document is an important step in the legal process. Only an attorney may sign his or her name on a pleading. Only an attorney may sign correspondence that offers legal advice. Whenever you put your name on the dotted line as a witness or a notary, be sure you actually see the person sign the document and always be certain of his or her identity. Last, review your jurisdiction's Court Rules, Model Rules of Professional Conduct, and (if available) the Guidelines for the Utilization of Paralegals/Legal Assistants to be sure that your actions always comply.

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Vicki Voisin, "[The Paralegal Mentor](#)", delivers simple strategies for paralegals and other professionals to create success and satisfaction by achieving goals and determining the direction they will take their careers. Vicki spotlights resources, organizational tips, ethics issues, and other areas of continuing education to help paralegals and others reach their full potential. She publishes a weekly ezine titled Paralegal Strategies and co-hosts The Paralegal Voice, a monthly podcast produced by Legal Talk Network. To get your own copy of Vicki's **151 Tips for Your Career Success**, go to <http://www.paralegalmentorblog.com>

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## The Most asked Questions about the Virtual Paralegal-Assistant Business

By: Cordina A. Charvis

[www.virtualparalegaltrainingcenter.com](http://www.virtualparalegaltrainingcenter.com)



The two most ask questions about the virtual paralegal business come from new paralegals and experienced paralegals/assistants. The new paralegals want to know

how to get started and experienced paralegals and assistants want to know how to market their services.

My advice to new virtual paralegals and assistants is to first determine whether or not you really want to launch a business or do you just want the flexibility of working from your home office. If you prefer to work from home to reduce your commute expenses and to have a more flexible schedule then that is something you need to discuss with your current employers; more companies today are open to having their employees work at least part-time from their home offices.

However, if you are sure that you want to start your own business then I would suggest that you start out on a part-time basis. Take your time to do the necessary planning and research before launching on a full time basis. There are several things you can do before you officially start your business while holding on to your day job. You can create a blog documenting your journey on how you started your virtual paralegal-assistant business; create your website, and social networking accounts as well as marketing your services.

You should also purchase the basic items that you will need to operate your home office that may include a computer with Internet access, a smart phone, all in one, fax, scanner, copier and printer. It is also important to have antivirus and computer back-up systems to protect your clients' information.

To get a feel of what it will be like to operate your business consider starting out by offering your services virtually to non-profit organizations; make sure to provide an honest day work just as you would for a paying client. Pro bono activities are also a great way to network and market your services. Most paralegal and legal professional associations are affiliated with organizations that provide pro bono opportunities for paralegals and assistants.

As they say practice what you preach, I have volunteered my services with the Bronx Clinic through inMotion.com a non-profit organization that provides legal services for low income families in matrimonial and family law; and that experience has given me the skills to offer uncontested divorce documentation services through my company. Pro bono.net is also a great place to start to be connected with volunteer opportunities.

So, what is the best way to market your services? There is no single "best" way for marketing your services. It comes down to a game of trial and error. It is very important that you keep track of your marketing methods to know which ones are working for your business.

Personally, I have tried several social networking media including Craigslist, Face book, Twitter and Linked In. I have had more success with Linked In than I have had with the other social media. Most of my current clients are attorneys who I have worked with in the past that have also referred my services to their friends, family and colleagues. I have recently started a marketing campaign geared towards the local attorneys in my area.

## The Importance of Clarity in Delegating Tasks to Your Virtual Paralegal

By: Jenna Borum  
<http://generatelegal.com/>

**Clarity in delegating tasks to your virtual paralegal will benefit your business relationship.** It will reduce the possibility of disappointment with your decision to outsource paralegal duties. It will enhance your law practice's profitability because your virtual paralegal is working efficiently and effectively for you. Here are **five ways to clearly convey your projects and tasks to your virtual paralegal** so that the outcome meets or exceeds your expectations:

•**Brainstorming Sessions:** This allows a sharing of ideas before a project or task is even delegated. Here you will learn whether or not you and your virtual paralegal are "on the same page" and, if necessary, it will allow an opportunity to get on it.

•**Provide a Template:** Lawyers have their own way of doing things. So providing your virtual paralegal with a template (or previously used document) will insure that your work is completed the way you want the first time. Revisions are often required, but by providing an example first, you will greatly reduce them.

•**Be Available:** You and your virtual paralegal have a business relationship. One part of this relationship is a team relationship and the other is a supervisory relationship – with you as the supervisor. This means that you and your virtual paralegal should have the same ability to "buzz each other" that you would have with an in-house paralegal. This can be accomplished daily or weekly through phone calls, Skype, email, document collaboration or remote desktop sharing. Whatever method makes the most sense at the time.

•**Share your System:** If you have a system for doing certain tasks, make sure it's shared. If you don't have a system in place, ask your virtual paralegal. Virtual paralegals are online because it's the nature of their business. If they are internet savvy and stay current on legal technology trends, they may be able to offer advice to you. Be open to new ideas.

•**Give the Big Picture:** Allow your virtual paralegal inside your head by sharing the background (and anticipated future) of the case they'll be working on. This overview will cement key issues and facts in their mind as tasks are delegated and work progresses on the case.

Are you clearly delegating tasks to your virtual paralegal? Insist on clarity from the very beginning of your relationship and you will be highly satisfied with the outcome.

©2011- Jenna Borum, paralegal and owner of *Generate Legal, LLC*;



*Jenna graduated from Villa Julie College (NKA Stevenson University) with a degree in Paralegal Studies – an ABA approved paralegal program. She brings over eight years of paralegal experience to her virtual practice and specialize in the areas of Civil Litigation, Plaintiff Personal Injury, Wrongful Death, Premises Liability and Insurance Defense. Ms Borum is also a member of the Maryland Association of Paralegals (MAP) and the National Federation of Paralegal Associations (NFPA).*  
<http://generatelegal.com>

## VIRTUAL PARALEGALS: Virtual paralegals are often highly specialized

By: Cathy L. Ribble, CP  
[Digital Paralegal Services Blog](#)



Like it or not, modern technology has greatly affected the practice of law. Some of those developments have enabled attorneys and paralegals to gain flexibility and choices concerning how they choose to provide paralegal services. Many legal professionals now work from home offices. Those who have taken that jump generally say they would never go back. Some attorneys still maintain their regular office, but they have chosen to take advantage of virtual paralegal resources. This enables them to cut costs for themselves and their clients.

For a number of years, some paralegals have done contract work, also known as freelance work. This work has been provided on an independent contract “as needed” basis for specific projects. Today, paralegals are taking the next step by establishing a fully equipped home office. By eliminating unnecessary commuting and other timewasters, realistically the paralegal can be more productive for attorneys. Attorneys and clients benefit because the paralegal gets paid only for time actually worked, and the paralegal draws no typical employee benefits.

As attorneys have become specialized, so have paralegals. That premise holds true for brick-and-mortar paralegals as well as virtual paralegals. By making the decision to work with a paralegal virtually, attorneys now have the option of working with specialized paralegals that are highly proficient in different areas of law. Attorneys are no longer limited by geographical boundaries, unless they choose to do so

[Digital Paralegal Services Blog](#) [May 13, 2011] © Digital Paralegal Services, LLC, Reproduced with permission.

*©2011- Cathy L. Ribble, CP is an experienced Certified Paralegal with over 15 years experience in the legal field. She is a wife, mother of three, and grandmother to handsome and adorable twin grandsons! After high school, she began working in a law firm in my Texas hometown as the receptionist and bookkeeper. In that position she also managed the firm's law library, handled payroll and ordered office supplies. She then began training as a legal secretary with the senior partner and his legal assistant. They became her mentors by taking time to explain why things are done a certain way and instilled a desire for excellence and professionalism. She soon learned about an organization named National Association of Legal Assistants (NALA) which had been formed. Her mentor went on to become one of the first legal assistants certified by NALA and her dream was born!*

**[“Virtual Paralegal Directory”](#) for virtual/freelance legal professionals – Join for free!**

## Cordina's Journey on Re-Launching her Virtual Paralegal Business

Cordina A. Charvis

[www.virtualparalegaltrainingcenter.com](http://www.virtualparalegaltrainingcenter.com)



Growing up as children we are often asked, "What do you want to be when we grow up?" My response was always an accountant. I have never had to really think hard about it because I knew I wanted to be just like my parents. My parents were both accountants and I admired the respect they received for their chosen professions.

*(They have since change to nursing and entrepreneurs).*

My first year in college when asked again by my counselor what would I like to major in; I enthusiastically responded "accounting". However a year into my major, averaging and barely passing my core accounting classes I quickly realized that mathematics was not one of my attributes.

The fears of failing my classes lead me to discuss my struggles with my academic counselor. To make a long story short she suggested that if I wanted to avoid taking math courses I should consider majoring in Criminal Law. The only math course required for a Criminal Law major at the time was college algebra. I took her advice and enrolled in my first prelaw class taught by a former prosecutor and from there I realized my love for the law. I went on to completing my degree in Criminal Law and my Paralegal Certificate.

My first paralegal position was with a large law firm in New York City where my normal hours were working until 3 am or later in the morning and then I was expected to be back into the office by 8 am. As grueling as this may sound I really enjoyed going to working and being a part of a team that really made things happened. I had the chance to work on several high profiles corporate deals and the perks of working at these firms made it all worth it. Some of my colleagues had the opportunity to work in different offices outside of the country and the generous allowance for dinner and car service made it difficult for me to move on.

However, the time had come when I knew that I wanted a new "normal" at least when it comes to my working hours so I started thinking about my next career move. I toyed with the idea of starting my own business in real estate while pursuing positions in legal departments. I knew I needed more time to save enough income before I could quit my day job and start a full time business.

Lucky for me, one day at lunch with a couple of my friends who were paralegals we began talking about starting our businesses when the idea came up that we should start a paralegal business together. This was early in the year 2005 and the term "virtual paralegal" was foreign to most people even in the legal industry. However, the terms freelance and independent contractors were well known and was an established business. We figured if we created a partnership we would not have the pressure of quitting our day jobs before the business was profitable. The partnership allowed us to continue to earn our regular income and benefits while growing our business on a part-time basis.

We started out assisting friends and family with completing legal forms given to them by their attorneys. Our first contract client came from an attorney that we have known for years to assist with company formations and dissolutions. Our business grew primarily from clients' referrals and marketing to local attorneys in our areas.

However, a couple of years into our partnership my partners decided to take advantage of the real estate boom and decided to part ways but were available to me as consultants. After my partners decided to move on I struggled with operating the business on my own because for the most part the services that we offered were my partners' specialties and I was very wary about hiring someone to replace them.

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I shelved the business for about a year and went back to focusing on my “in-office” paralegal position. I tried to figure out what should be my next step with re-launching my business. I started by writing about the virtual paralegal business and submitted my articles to paralegal associations for their monthly newsletters. With the acceptance of my articles came the idea to write my eBook entitled, [The Ultimate Virtual Paralegal Guide](#).

I prepared a virtual tour for my eBook and during the tour I received invitations from paralegal and legal professional associations to be a guest speaker and to present webinars about the virtual paralegal business. I quickly realized there was a growing interest about the virtual paralegal business but there were no information or resources available to address them which lead to the birth of the Virtual Paralegal Training Center™ (“VPTC”).

I have created VPTC with the goal to provide training and resources for paralegals and assistants and to bring recognition to the industry. I figured I could accomplish this by educating attorneys and small businesses of the benefits and savings of hiring virtual paralegals and assistants to take their business and legal practice to the next level.

VPTC got off to a slow start but has gradually connected with its followers. Now with the growing success of VPTC I still missed having my virtual paralegal firm and I have to admit that at this point I was a little nervous to re-launch my firm without my partners. It didn’t take long for me to get over my fears of doing it on my own. I have more than 12 years solid experience as a corporate paralegal so I know getting my assignments done would be the easy part. The part I was most worried about is juggling more than one business on my own.

I started by re-writing my business plan and I created a checklist to guide me through the process. I am proud to say that I have successfully re-launched my paralegal firm called [Evolution Parajuristes](#) (“EP”).

First, I re-connected with old clients to get the word out that I was back in business and I gave my business card to everyone from my mechanic to my hair dresser and guess what, they are both my clients! 😊.

My goal in the near future is to expand EP into a full service paralegal firm by partnering with other paralegals and assistants in other practice areas to offer a variety of services. At this point, I have my hands full with meeting my goals for VPTC, EP and balancing my personal life. When the time is right I will find the right partners who have a similar vision as mine that will compliment my strengths and weakness to help me take my business to the next level.

If you have a story about your journey of starting your virtual paralegal-assistant business and would like to share it with our readers, please email us at [inbox@cdcvop.com](mailto:inbox@cdcvop.com)

Until next time

## The Low Cost Bankruptcy Filing Scam Revealed

By: Victoria Ring

<http://chapter7and13bankruptcyblog.com/>

Have you noticed the ads in newspapers from law firms claiming to file a bankruptcy for only \$300 or \$200 or even as low as \$150? Did you ever wonder how they can charge this low of an amount and still stay in business? Here are two scams that use these techniques:

### **Scam 1: Pretending to do a loan modification**

A law firm will advertise to do loan modifications for clients. They rent mailing lists of people facing foreclosure and target them with promises of helping to save their home.

Once the client has paid \$4,000 or \$5,000, the law firm will claim the mortgage company would not accept their offer. The only choice left for the client is to file bankruptcy. Of course the law firm will pretend to give the clients a deal and charge them \$300 or less for filing the petition. But remember, they just received \$4,000 or \$5,000 for doing nothing.

How do I know this happens? Because I have personally been involved with four law firms who used these tactics. I refused to work for them, but other virtual assistants worked for law firms like this and reported their horror stories to me.

### **Scam 2: The low price is only for a skeleton filing**

Some law firms will advertise low prices for filing bankruptcy because this price is only for filing the Voluntary Petition and Creditor's Matrix. This type of filing will stop any legal action against the debtor but they will only have 14 days before they must file the remaining schedules of the petition.

Of course the law firm will charge extra for Schedule A, Schedule B and so forth. By the time the clients pay for each remaining schedule,

they have more money invested compared to paying an honest bankruptcy attorney the full fee in the beginning.

But the next time you see one of those low-cost ads for filing bankruptcy, perhaps this article will help you shed some light on the possible truth behind the low price. Also, you can use the information to educate your staff and your clients who may ask you about these ads.

Be sure to pick up your free tools from Chapter 7 and 13 Training.com at: <http://chapter7and13training.com/>

*©2011- Victoria Ring began her legal career in 1977 as a legal typist. Today, Victoria Ring is an author, publisher and entrepreneur with over 20 years experience in the small business marketing field and 32 years experience in the legal field. She has published and authored 22 books, hundreds of articles as well as a series entitled "Victoria's Reports" which centered on the topic of marketing and building a successful freelance business working from home.*



*Additionally, Victoria Ring is a Certified Paralegal and Debtor Bankruptcy Specialist. She obtained her Associate's Degree in Business Management from Columbus Business University (1986) and her Associates in Paralegal Studies from Ashworth College (2001.) Her Certified Paralegal Certificate was obtained from the Constitutional Educational Research Foundation of California and her Certified Bankruptcy Assistant Certificate from the Association of Bankruptcy Judicial Assistants.*



## Did You Know?

By: Zoleeta S. Myers-West  
<http://zmwadminservices.yolasite.com/>

*Here are some interesting facts about the Paralegal profession:*

- The paralegal profession was developed in the 1960s, but the term “legal assistant” and “paralegal” was made official by the ABA in 1986.
- In the United States there is no such thing as a “licensed paralegal”, but there are “licensed paralegal” in the United Kingdom and Canada.
- Many states designate a day to celebrate their paralegals. The date differs from state to state. Generally, American paralegals are celebrated on Saint Patrick’s Day.
- The U.S. Bureau of Labor Statistics prediction is that the paralegal profession will *grow* faster than average, with 22% increase between 2006 and 2016.

### Official Definitions of ‘Paralegal’ from around the World:



In the United States – from the [ABA](#): “A legal assistant or paralegal is a person qualified by education, training or work experience who is employed or retained by a lawyer, law office, corporation, governmental agency or other entity who performs specifically delegated substantive legal work for which a lawyer is responsible”.



In Canada - from the [Paralegal Society of Ontario](#): "A paralegal is an individual qualified through education or experience licensed to provide legal services to the general public in areas authorized by the Law Society of Upper Canada”.



In the United Kingdom - from the [National Association of Licensed Paralegals](#): “A person who is educated and trained to perform legal tasks but who is not a qualified solicitor or barrister”.

*Zoleeta S. Myers-West is a virtual administrative assistant who has been offering her services since 2009. She achieved her Associate’s Degree in Business in December of 2009. View her professional profile on oDesk: | Follow Zoleeta on Twitter: @zmyerswest| <http://zmwadminservices.yolasite.com/>*

## Problem Clients

By: Cordina A. Charvis

[www.virtualparalegaltrainingcenter.com](http://www.virtualparalegaltrainingcenter.com)



The ability to work well with different times of personalities is an important characteristic for operating a virtual paralegal or assistant business. Not all clients are created equal so you have to know the difference between a client that is focus on accomplishing their goal from a client who is just simple rude and disrespectful. Here are a few tips on identifying a “*problem*” client and what to do when you encounter one.

### How to tell if a prospective client is going to be a “problem client”?

- If the client does not show you respect at your first meeting whether by phone or in person.
- If the client complains or bad mouth their previous virtual paralegal or assistant.
- If the client fails to explain the assignment clearly.
- If the client cancels multiple meetings.
- If the client do not have a clear deadline.
- If you do not have a clear point of contact for the client.
- If it is difficult to find the client.
- If the client refuses to sign an agreement.
- If the client wants to sign agreements that only covers them and not you.
- If the client wants you to charge significantly less than your asking price.
- If the client wants you to bend or break the law.

### When to say no to a client

- You should say no to a client when you are not qualified to do the assignment. Let the client know that you are not experienced in that particular area and you are not comfortable that you will deliver a satisfactory outcome.
  - Refer the client to another virtual paralegal who is familiar with that type of work or refer the client to a resource such as the Virtual Paralegal Directory where the client may find someone who is qualified to do the work.
- You should say no to a client if the client offers you a project you would not enjoy working on. You are not going to like working on all your projects but if you are offered a project that you know will be difficult for you to give your best you should turn down the offer.
- If you are not available to meet the client’s deadline you should reject the assignment.
- If you do not feel that you will be comfortable working with a particular client you should not accept their assignment instead respectfully, decline.
- Try to avoid clients with unrealistic expectations or demands.

### When to “fire” a problem client?

It is time to “fire” your client if:

- Your client is rude and disrespectful to you and your staff.
- Your client insists on more of your time than they are willing to pay for.
- Your client tries to sneak in more work for the initial project price.
- Your client does not hold up his/her end of the agreement making it difficult for you to complete the assignment.
- Your client is too un-organized.
- Your client does not have time or is unwilling to communicate what they want from you.
- Your client is emotionally unbalanced.
- If the client wants you to bend or break the law.
- Your client does not pay on time or pay you at all.

Do you have a  
Virtual-Paralegal Question?  
Ask VirtPara!



### Ask VirtPara

*What are some of the challenges of working as a virtual paralegal?*

One of my biggest challenges of working as a virtual paralegal was to no longer have an immediate access to technical and administrative support.

I have purchased technical support online and I have been lucky to partner with an administrative assistant that is great at what she does and most importantly, she really do understands me and what I want to achieve for my business.

Marketing is also a common challenge for virtual paralegals and assistants when starting their businesses. You have to be very committed to marketing your services on a consistent basis to connect with clients and to help you to grow your business.

*Do you have a question about the virtual paralegal or assistant business?*

Ask VirtPara and let us discuss it. Follow [VirtPara on Twitter](#).



### Paralegal News

- [Paralegal, Postal Inspector Face Perjury Charges re Alleged Secret Romance During Lawyer's Trial - N](#)
- [Law Firm's Defamation Suit Against Ex-Paralegal Claims Lost Business from Online Review](#)
- [Paralegal Has 1 Month to Pay \\$7.5K and Get 45 Days re \\$72K Law Firm Trust Account Spending Spree](#)
- [Paralegal Says Others Scribed 'Attorney' Signatures on 1,000 Deeds in Foreclosure Cases](#)
- [Paralegal Sues Fla. Foreclosure Firm, Says She Was Required to Work Unpaid Overtime](#)

**Today's Quote:** *My son is now an "entrepreneur." That's what you're called when you don't have a job. Ted Turner*

## Virtual Paralegal Networking Blog

- [Do you know the other virtual paralegal-assistants who work in your practice areas?](#)
- [What type of software is necessary for your practice areas?](#)
- [What surprised me the most about marketing my virtual paralegal-assistant business?](#)
- [What surprised you the most about working as a virtual paralegal-assistant?](#)
- [What are the benefits of starting a virtual paralegal-assistant business?](#)
- [How to use direct mailing to market your virtual paralegal-assistant business?](#)
- [Growing your virtual paralegal-assistant business](#)
- [Unauthorized Practice of Law \(UPL\) is the responsibility of the virtual paralegal and the attorney.](#)
- [Virtual paralegal-assistant job posting links](#)
- [The virtual paralegal-assistant accounting system](#)
- [8 Ways to create and develop your virtual paralegal-assistant business' niche](#)



### VPTC New Members

A special welcome to VPTC's new members:

Andreya Allen	Sonjanita C. Jordan
David Anderson	Jackie Paulson
Annette Anghel	Cynthia Pilato
Kelly Arciszewski	Elizabeth Reyes
Matthew Ashcraft	Sophia Rivas
Anne Baldwin	Jessica Schmeidler
Mary Basile Logan	Angela Scott
Della Beaver	Vicki Scott
Joy Belk	William Sewell
Lyn Berry	Lisa Waugh
Julie Buchanan	Shawn Williams
Rhonda Coren	Bradley Wyatt
Michelle Dratch	
Tunde Fabunmi	
James Goodman	
Maria Guthrie	

## Virtual Paralegal & Assistant Networking



- ✓ [Get listed](#) in our virtual paralegal directory
- ✓ [Subscribe](#) to our free online virtual paralegal newsletter magazine™
- ✓ [Subscribe](#) to our virtual paralegal networking blog
- ✓ [Join](#) the discussion on our virtual paralegal networking forum
- ✓ [Join](#) our Virtual Paralegal Training Center™ group on Linked In
- ✓ Follow us on Twitter – [VirtPara](#)
- ✓ [Like](#) the Virtual Paralegal Training Center™ on Face book
- ✓ [Get your copy](#) – virtual paralegal eBooks

## Virtual Paralegal & Assistant Resources

### Virtual Paralegal and Assistant Tasks

Please [click here](#) for a list of approved tasks by accredited paralegal associations that may be delegated to paralegals and assistants under the supervision of an attorney.

### Virtual Paralegal Client Blog

The virtual paralegal client blog discusses questions and concerns attorneys may have about hiring and working with virtual paralegals and assistants. Topics may include but are not limited to confidentiality, software, fees, marketing, conflict of interests, and paralegal ethics among other things.

### Virtual Paralegal Directory

VPTC provides a virtual paralegal directory where attorneys and business owners may search free of charge to be connected with virtual paralegals and assistants from all practice areas throughout the world.

[Click here to become a member of our virtual paralegal directory](#)

[Click here to browse our virtual paralegal directory](#)

**Virtual Paralegal Newsletter Magazine™**

Virtual Paralegal Newsletter Magazine™ is the industry leading information resource for paralegals and assistants to stay current on the latest news, regulations, technology and new legal law practice. <http://www.virtualparalegaltrainingcenter.com>

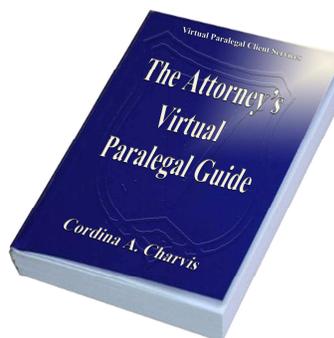
- [Free virtual paralegal directory](#)
- [Virtual paralegal survey](#)
- [Virtual paralegal-assistant e-Books](#)
- [Network with virtual paralegals and assistants](#)
- [Contact VPTC](#)

**Writers/bloggers wanted**

The Virtual Paralegal Training Center™ is looking for volunteer contributors for our Virtual Paralegal Newsletter Magazine™ and blogs.

Contributions may come in the form of blog posts, articles, interviews, tips and resources relevant to the virtual paralegal-assistant business.

We aggressively advertise our newsletter magazine using several forms of marketing methods to make sure it gets in front of legal professionals including but not limited to attorneys, paralegals, legal managers, assistants and legal educators. [Read More](#)

**The Attorney's Virtual Paralegal Guide – eBook**

Now only **\$7.99** – [Click here for your copy](#)

**Connect with Virtual Paralegal Clients**

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