



January 2010

# Southeast Texas Association of Paralegals

## Lex Amicus

A bi-monthly publication of the Southeast Texas Association of Paralegals, Inc., (SETAP), an affiliate of the National Association of Legal Assistants, Inc. (NALA).

P.O. Box 813, Beaumont, TX, 77704

Web Address: [www.setap.org](http://www.setap.org)

### MISSION STATEMENT

The Southeast Texas Association of Paralegals, Inc., is a nonprofit organization of paralegals committed to establishing good fellowship among association members and members of the legal community, encouraging a high order of ethical and professional attainment, and furthering education among member of the profession.

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# President's Message

"Another fresh new year is here...  
Another year to live!  
To banish worry, doubt, and fear,  
To love and laugh and give!

This bright new year is given me  
To live each day with zest...  
To daily grow and try to be  
My highest and my best!

I have the opportunity  
Once more to right some wrongs,  
To pray for peace, to plant a tree,  
And sing more joyful songs!"

~William Arthur Ward~

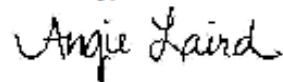
As we begin 2010 I would like to wish each of you a very happy and prosperous new year! I hope that everyone had a wonderful Christmas and enjoyed time spent with family and loved ones.

SETAP held its annual Christmas Luncheon on December 17, 2009 at Strong Pipkin Bissell & Ledyard, LLP. Many thanks to Strong Pipkin for the use of their beautifully decorated conference room! We had a wonderful turnout with plenty of delicious food and dessert. Everyone enjoyed the gift exchange game as Michael Johnson of Discovery Resource narrated the "Wright Family Christmas" story. Thanks to Michael and Discovery Resource for providing the delicious desserts! Thanks also to Nell McCallum & Associates, Team Legal, Jan Girouard & Associates, and Reliable Court Reporting for the fabulous door prizes! In addition, and as part of our Christmas luncheon, SETAP's community service project this year was to donate Christmas gifts to the children of CASA. I would like to express my sincere, heartfelt thanks to each of you for your generous contributions. Eleanor Johnson, Court Program Director for CASA was absolutely thrilled when she saw the amount of gifts that were donated, and sends her sincere gratitude to SETAP on behalf of CASA for giving to these children in need. SETAP has made a difference in the life of these children!

SETAPA has a new addition. We now have a Facebook page. You can check it out and join by searching "The Southeast Texas Association of Paralegals" on Facebook.com.

I look forward to the new year ahead as we prepare to kick off TAPA 2010 in April! As always, please feel free to contact me with questions, comments or suggestions.

Sincerely,



Angie Laird  
SETAP President 2009-2010

### **SETAP 2009-2010 VOTING BOARD**

#### **MEMBERS**

Angie Laird	President
Jane Barron	President-Elect
Sheila Milbrandt	1 <sup>st</sup> Vice President
Misty Segrest	2 <sup>nd</sup> Vice President
Marissa Paltz	Secretary
Rene Crum	Treasurer
Cheryl Bryan	NALA Liaison
Cheryl Bryan	PD Liaison
Melissa LeJeune	Parliamentarian
Mary Beth Jones	Executive Advisor

### **SETAP 2009-2010 STANDING COMMITTEE CHAIR**

#### **PERSONS**

Misty Segrest	Nominations & Elections
Sheila Milbrandt	Membership Development
Vacant	Public Relations (Special Projects)
Vacant	Audit
Misty Segrest	Programs/Speaker Meetings
Sheila Milbrandt	Job Bank
Caryl McBroom	Newsletter
Melissa LeJeune	Teen Court

### **INSUFFICIENT FUNDS POLICY**

If collection efforts are unsuccessful for thirty (30) days, and the check is non-dues related, research whether the check may be turned over to the appropriate county district attorney and take steps to submit it.

If collection efforts are unsuccessful for thirty (30) days, and the check is dues related, draft a letter to the Membership Chair for the President's signature requesting member be removed from the membership roles and write member explaining that dues amount plus \$25.00 returned check charge must be sent to the Treasurer in order to reinstate membership.

Always give a hundred percent, and you'll never have to second-guess yourself~  
**Tommy John with Dan Valenti**



#### **Useful Links:**

<http://www.vpcalendar.net/> (print any calendar from 1901-2100)

<http://www.uscounties.com/> (site to locate what county a city is in, covers all 50 states)

<http://publicrecords.netronline.com/> (links to county real estate records for all 50 states)

<http://www accurint.com/> (low cost person finder/asset search, run by Lexis, only available to attorneys, police, insurance investigators, etc.)

<http://www.nolo.com/dictionary/> (plain English law dictionary)



\*\*\*\*\*

## Teen Court



Teen Court is held on Tuesday evenings from 5:15p.m. to 7:30p.m. at the Beaumont Municipal Court. Below is a schedule for 2009-2010 for those who would like to participate in this worth-while experience.

### 2010

January 5, 2010  
January 19, 2010  
February 2, 2010  
February 16, 2010  
March 2, 2010  
March 16, 2010  
March 30, 2010  
April 13, 2010  
April 27, 2010  
May 11, 2010-      Appreciation Banquet

*If anyone would like more information please do not hesitate to contact Melissa LeJeune at 839-4545 or [melissa@pwn-mediate.com](mailto:melissa@pwn-mediate.com).*



**REMINDERS:**

**PLEASE VISIT THE CALENDAR PAGE AT [WWW.SETAP.ORG](http://WWW.SETAP.ORG) FOR UPCOMING SETAP EVENTS.**

\*\*\*\*\*



**“Special thanks to Perry W. Neichoy for his continued support of SETAP and TAPA”**

**Perry W. Neichoy, P.C.  
LAWYER – Mediator**

**(409) 839-4545 \* Fax (409) 832-1378; [www.pwn-mediate.com](http://www.pwn-mediate.com)**

**Locations**

**Beaumont**

Century Tower  
550 Fannin Street, Suite 111  
Beaumont, Texas 77701

**Houston**

5 Houston Center  
1401 McKinney, Suite 2250  
Houston, Texas 777010

\*\*\*\*\*



## JOB BANK

The Southeast Texas Association of Paralegals (SETAP) operates a Job Bank and needs resumes! Local employers have utilized this service for many years as a means of searching for qualified employees. If you know anyone looking for a position as a paralegal or legal secretary, please encourage him or her to submit their resume to SETAP's Job Bank by contacting:

Sheila Milbrandt  
Germer Gertz, LLP  
P. O. Box 4915  
Beaumont, TX 77704  
(409) 654-6725  
(409) 835-2115  
[sheila@germer.com](mailto:sheila@germer.com)

The fee is \$10.00 for non-SETAP members and \$5.00 for SETAP members. All checks must be made payable to SETAP.



**SOUTHEAST TEXAS ASSOCIATION OF PARALEGALS  
MONTHLY TREASURER'S REPORT  
AS OF NOVEMBER 30, 2009**

<b>BEGINNING BALANCE – 10/1/09:</b>		<b>\$ 13,180.52</b>
<b>RECEIPTS:</b>		
Job Bank	10.00	
TAPA Conf. sponsorship – OB&T	500.00	
Voided Ck. for security deposit	200.00	
		<u>710.00</u>
<b>DISBURSEMENTS:</b>		
***None	0.00	
		<u>0.00</u>
<b>ENDING BALANCE – 11/30/09:</b>		<b>\$ 13,890.52</b>

Respectfully Submitted,

Rene' Crum  
Treasurer

\*\*\*I have a call in to Juxtapose regarding the November bill for webhosting. Didn't realize we didn't get one until I started doing the report. We will probably have a double bill for December.



**SOUTHEAST TEXAS ASSOCIATION OF PARALEGALS  
MONTHLY TREASURER'S REPORT  
AS OF DECEMBER 31, 2009**

<b>BEGINNING BALANCE – 12/1/09:</b>		<b>\$ 13,890.52</b>
<b>RECEIPTS:</b>		
None (The Premier fundraiser hasn't been deposited and will be reflected on the January Report)		<u>0.00</u>
<b>DISBURSEMENTS:</b>		
Carlito's – Christmas Luncheon	394.52	
Juxtapose – Nov. & Dec. Web Hosting	54.12	
		<u>448.64</u>
<b>ENDING BALANCE – 12/31/09:</b>		<b>\$ 13,441.88</b>

Respectfully Submitted,

Rene' Crum  
Treasurer



# Report on SETAP's Fundraisers for the TAPA Conference

Fundraiser	Amount Raised
SETAP T-Shirts	\$156.46
SETAP Tote Bags	\$44.41
SETAP Hoodies	\$6.33
Hall's Court Directories	\$204.00
Premier Jewelry I	\$457.00
Colorado Canyon	\$336.38
Butter Braid Pastries Sale	\$1,260.00
Premier Jewelry II	\$136.00
<b>Total Raised:</b>	<b>\$2,600.58</b>



# TAPA Sponsorships

<b>PLATINUM</b>
Germer Gertz, LLP
Jenkins Martin, LLP
Loncar & Associates
Orgain Bell & Tucker, LLP
<b>GOLD</b>
Nell McCallum & Associates, Inc.
Strong Pipkin Bissell & Ledyard,
<b>SILVER</b>
Hunter Burch, LLP
<b>BRONZE</b>
Benckenstein & Oxford, LLP
Perry Neichoy, P.C.
<b>TOTAL SPONSORSHIPS: \$3,000.00</b>





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**HAVE YOU MOVED?  
CHANGED JOBS?  
NEW E-MAIL?**

**IF SO, PLEASE CONTACT SHEILA MILBRANDT AT  
[sheila@germer.com](mailto:sheila@germer.com) SO SHE CAN UPDATE YOUR  
INFORMATION ON THE ROSTER.**

\*\*\*\*\*

Active Member..... .46  
Associate Members..... 6  
Sustaining Members..... .1  
Freelance Members.....1

\*\*\*\*\*



Linda Kellum	January 7
Angie Laird	January 11
Sandra Kirkland	January 19
Trish Carpenter	January 20
Sarah Buser	January 21
Darlene Guy	January 31
Regina Rogers	February 13
Regina Youngblood	February 17
Vicki Westbrook	February 26
Cheryl Bryan	February 28
Misty Segrest	February 29

*Nobody grows old merely by living a number of years. We grow old by deserting our ideals. Years may wrinkle the skin, but to give up enthusiasm wrinkles the soul...*  
Samuel Ullman



# Jane Barron Honored at DRC Appreciation Dinner

\*\*\*\*\*



The Dispute Resolution Center of Jefferson County (DRC) held its Annual Mediator Appreciation Dinner on December 7, 2009 at the Holiday Inn Plaza Hotel. The guest speaker for the evening was Judge Keith Giblin, who provided a Judge's perspective on the benefit of mediation and the contribution made by mediators. During the award ceremony, our own Jane Barron was one of the four mediators honored in the 2007 Training Class for Outstanding Achievement in skill as a mediator, and willingness to serve and contribute in so many ways to the DRC. This was a great honor and we offer our congratulations to Jane for the valuable work she does for the DRC and for Jefferson County.

# 2009 SETAP Christmas Luncheon!



**Merry Christmas!**



**Happy Holidays!**

**CASA Gifts!**





**Season's Greetings!**



**Happy New Year!**



## **Congratulations Linda Kellum!** **SETAP Associate Member**



Linda Kellum looks at the award she received this week from the Texas Association of Court Administrators for her outstanding work both at her job as court coordinator for Judge Earl Stover II and with the association.

## **Order in court receives attention**

By **BLAIR DEDRICK ORTMANN**  
Beaumont Enterprise  
November 18, 2009

For 14 years, Linda Kellum's smile has greeted rushed attorneys and irate citizens, court reporters and clerks alike in the office of 88th District Judge Earl Stover III.

Her calm manner belies the phone calls she makes and answers, the scheduling she juggles and the files she goes over as she performs her duties as Stover's court coordinator.

"When people call and ask if I'm Judge Stover's secretary, I correct them," she said. "I'm a coordinator."

In addition to her job, she has taken the position further, becoming a leader in the Texas Association of Court Administrators by teaching other court coordinators, organizing conferences and meetings and serving on the organization's board for several years.

Her outstanding work earned her the Justice Charles W. Barrow Award this week from the association. The award, which is not given every year, recognizes someone who has "high standards of excellence" and who makes "extraordinary contributions in promoting court administration in Texas," according to the organization's Web site.

# National Association of Legal Assistants \* Paralegals

**Quality Time**  
 Sometimes the best way to spend time is to invest it in yourself.



*Advanced*  
 PARALEGAL CERTIFICATION



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- Social Security Disability
- Trial Practice
- Alternative Dispute Resolution
- Business Organizations: Incorporated Entities
- Trademarks

Visit [www.nala.org](http://www.nala.org) and click on "Advanced Certification" for details.




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 LEGAL ASSISTANTS • PARALEGALS

## A Full Educational Program

- Litigation Institute (Mock Trial)
- Human Resources Institute
- Branding
- Inside the 'Federal Triangle' with Hollywood Guilds
- New Media and the Guilds
- Love, Divorce, and Paralegals
- Preparing for Temporary Orders
- The Military Family
- Immigration: A-to-Zs of H-1Bs
- Asbestos Litigation
- Navigating the Environmental Maze
- Inadvertently Disclosed Privileged Documents

### Member Exchange Presentations

- International Transactions
  - Catherine R. Durgin, ACP
  - Mary L. Theroux, ACP
- Social Networking: Not Just for Kids
  - Vicki Veisin, ACP

### Affiliates Exchange

- Increasing Your Association's Visibility in Your Community
  - San Diego Paralegal Association
- How to Organize a Successful and Profitable Seminar with Emphasis on Review for the CLA/CP Exam
  - Tennessee Paralegal Association

Details at [www.nala.org](http://www.nala.org) (*Register Online*)

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**3rd Annual**  
**“IMPORTANT SKILLS FOR TODAY’S PARALEGAL”**

**Hosted by: District 10 Members**  
**Paralegal Division —**  
**State Bar of Texas**

**Half-Day Seminar**  
**Friday**  
**February 5, 2010**  
**Homewood Suites**  
**by Hilton**  
**The Woodlands, Tx**



## 3rd Annual "Important Skills for Today's Paralegal"

**Half-Day Seminar**  
**Friday, February 5, 2010**  
**8:00 a.m.—1:00 p.m.**



**Homewood Suites by Hilton**  
**29813 I-45 North**  
**The Woodlands, Texas 77381**  
**(281) 681-9199**  
**[www.homewoodsuites.com](http://www.homewoodsuites.com)**



### **\* Agenda 8:00 a.m.—1:00 p.m. \***

*Includes Continental Breakfast and Mid-Morning Snack*

- |                              |   |
|------------------------------|---|
| <b>8:00 a.m.—8:30 a.m.</b>   | <b>Registration and Breakfast</b>   |
| <b>8:30 a.m.—9:30 a.m.</b>   | <b>Medical Expenses: Paid or Incurred</b><br><b>CURRY L. COOKSEY, ATTORNEY</b><br>Orgain Bell & Tucker, LLP<br>The Woodlands, Texas             |
| <b>9:30 a.m.—10:30 a.m.</b>  | <b>Internet Legal Research: Sites for Sore Eyes</b><br><b>MARK E. STEINER, PROFESSOR OF LAW</b><br>South Texas College of Law<br>Houston, Texas |
| <b>10:30 a.m.—11:00 a.m.</b> | <b>Break and Visit Vendors</b>  |
| <b>11:00 a.m.—12:00 p.m.</b> | <b>Discovery: It's All In the Wording</b><br><b>LISA SPRINKLE, ACP</b><br><b>PARALEGAL DIVISION AMBASSADOR</b><br>Legal Works<br>El Paso, Texas |
| <b>12:00 p.m.—1:00 p.m.</b>  | <b>Ethical Practice Pointers for Today's Paralegal</b><br><b>J. MITCHELL SMITH, ATTORNEY</b><br>Germer Gertz, LLP<br>Beaumont, Texas            |

## 3rd Annual "Important Skills for Today's Paralegal"

### \* CONTINUING LEGAL EDUCATION \*

4 hours of CLE has been approved by the Texas Board of Legal Specialization in each of the following areas of law:



- Civil Trial Law
- Criminal Law
- Family Law
- Personal Injury Trial Law



\*\*\*\*\*  
**Discount For Early Registration!**

Receive a discount by submitting your registration form and tuition by January 14, 2010.

\*\*\*\*\*  
**DOOR PRIZES WILL BE GIVEN AWAY!!**

### \* Seminar Hosts \*

#### District 10 Paralegal Division Members

##### PR Sub-Chair:

Mary Beth Jones, CLA  
WaldenReynard, PLLC  
2615 Calder, Suite 520  
Beaumont, Tx 77702  
(409) 833-0202

[marybethi@wrtexaslaw.com](mailto:marybethi@wrtexaslaw.com)

##### Elections Sub-Chair:

Angie Laird, ACP, TBLS  
Orgain Bell & Tucker, LLP  
P.O. Box 1751  
Beaumont, Tx 77704

(409) 838-6412  
[alaird@obt.com](mailto:alaird@obt.com)

##### Director:

Cheryl Bryan, CP, TBLS  
Orgain Bell & Tucker, LLP  
P.O. Box 1751  
Beaumont, Tx 77704  
(409) 838-6412

[cbryan@obt.com](mailto:cbryan@obt.com)

##### CEC Sub-Chair:

Sheila Milbrandt  
Germer Gertz, LLP  
P.O. Box 4915  
Beaumont, Tx 77704  
(409) 654-6700

[sheilal@germer.com](mailto:sheilal@germer.com)

##### Membership Sub-Chair:

Audrey Moore, CP  
Orgain Bell & Tucker, LLP  
10077 Grogan's Mill Rd, Ste 500  
The Woodlands, Tx 77380  
(281) 296-8877

[amoore@obt.com](mailto:amoore@obt.com)

# 3rd Annual "Important Skills for Today's Paralegal"

## \* REGISTRATION FORM \*



Please Print or Type Information:

Name: \_\_\_\_\_ Professional Designation: \_\_\_\_\_

PD Member?   Y  N PD Member # \_\_\_\_\_ County in which you work: \_\_\_\_\_

Company Name: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

### **\*Tuition\***

(Includes continental breakfast and mid-morning snack)

#### **EARLY Registration (Received by January 14, 2010):**

PD Members	\$40.00
Student Members	\$30.00
Non-Members	\$55.00

#### **LATE Registration (Received AFTER January 14, 2010):**

PD Members	\$50.00
Student Members	\$40.00
Non-Members	\$65.00

Payment Amount: \$ \_\_\_\_\_ Check # \_\_\_\_\_ Driver's License # \_\_\_\_\_ State \_\_\_\_\_

**\*Tuition must be submitted with registration form.**

**\*\*An additional \$25 will be assessed for a returned unpaid check.**

**Make checks payable to the Paralegal Division and mail to:**

Angie Laird  
Orgain Bell & Tucker, LLP  
P.O. Box 1751  
Beaumont, Texas 77704-1751  
Telephone: (409) 838-6412, ext. 415  
alaird@obt.com

\*\*\*\*\*

**Note: You are welcome to register at the door, however, we can only guarantee seminar materials to those who pre-register.**

## Texas Board of Legal Specialization

The Texas Certification Program for Paralegals was created in 1993 when the Supreme Court of Texas issued an order amending the Texas Plan for Recognition and Regulation in the Law to include the administration of the Paralegal Specialty Certification program.

The Supreme Court of Texas authorized the Texas Board of Legal Specialization (TBLS) to administer a certification program for Texas Paralegals which is patterned after the Texas attorneys' certification program. The purpose and objective of Paralegal certification is to recognize and promote the availability, quality, and utilization of Paralegals who work under the supervision of a duly licensed attorney, achieve a level of special knowledge in particular fields of law, and further, to assist attorneys in their dedication to serving the public interest and advancing the standards of the legal profession.

The TBLS goal is to promote a professional recognition and advancement for Texas Paralegals. Upon meeting the following requirements and successful completion of the examination, the Paralegal will receive a designation that recognizes their level of special knowledge in one of the following specialty areas: Civil Trial Law, Criminal Law, Estate Planning and Probate Law, Family Law, Personal Injury Trial Law, and Real Estate Law.

### Required Professional and Educational Experience

- A minimum of 5 years of actual experience as a paralegal by December 31 in the year of application.
- Actual Texas experience in the particular specialty area during each year of the 3 years immediately preceding application.
- Meet at least one of the following by the application filing deadline:
  - Successful completion of the NALA (National Association of Legal Assistants) Certification examination; or
  - A baccalaureate or higher degree in any field; or
  - An ABA approved program of education and training for paralegals; or
  - A paralegal program that consists of a minimum of 60 semester credit hours (or equivalent quarter hours) of which at least 18 such credit hours are in substantive legal courses; or
  - A paralegal program that consists of at least 18 semester credit hours of substantive legal courses, plus at least 45 semester credit hours (or equivalent quarter hours) of general college curriculum courses; or
  - Four (4) additional years of actual experience working as a paralegal under the direct supervision of a duly licensed attorney, for a total of 9 years of actual experience by December 31 in the year of application.

### Peer Review

Contact by TBLS of applicant's supervising attorneys and other non-attorney professionals to attest to the applicant's competence as a paralegal in the specialty area.

### Continuing Legal Education

Complete 30 hours of CLE in the specialty area within the 3 years immediately preceding application through December 31<sup>st</sup> in the year application is submitted

### Substantial Involvement

Devote a minimum of 50% of paralegal duties to the specialty area during each year of the 3 years immediately preceding application and submit information demonstrating substantial involvement in the specialty area, evidencing that the applicant has acquired experience and expertise in the specialty field by showing a level of utilization necessary to justify the representation of special competence.

To view the Paralegal Certification Process and request the 2009 Application for Certification, visit [www.tbls.org](http://www.tbls.org) and click on "Get Certified". For additional questions contact Molly Galvez at [mgalvez@texasbar.com](mailto:mgalvez@texasbar.com) or by telephone at: 1-800-204-2222 x1454 or 512-453-7266 x102.

### TEXAS CERTIFIED PARALEGALS

Field	#Certified
Family Law	104
Personal Injury Trial Law	90
Civil Trial Law	79
Criminal Law	10
Real Estate Law	18
Estate Planning & Probate Law	15
Total Active Paralegal Certificates	316
Total Active Individual Paralegal Certificates	292

*Make plans to join us next year!*



## **Austin, Texas**

2010 Texas Advanced Paralegal Seminar  
Doubletree Hotel - Austin  
September 29 - October 1, 2010



*Save the date!*



**State Bar of Texas - 2010 Annual Meeting**

The 2010 Annual Meeting will be held June 10-11, 2010 at the beautiful new Omni Fort Worth Hotel in downtown Fort Worth. More details to come!

**“As we begin this new year, thanks to all of you who are also members of the Paralegal Division. We encourage those of you who are not currently members to join. There are many benefits of membership, and I encourage each of you to check out the website at [www.txpd.org](http://www.txpd.org) for additional information. Attached to this newsletter are applications for both active and student memberships. Thank you for considering this great way to promote and advance the professionalism of our organization.”**

**PARALEGAL DIVISION**  
STATE BAR OF TEXAS



**ACTIVE MEMBERSHIP APPLICATION**

**TO BE FULLY COMPLETED BY APPLICANT**

**DUES:** \$70.00 per year. An additional \$25 fee will be assessed for any returned check. The Membership Year for the Paralegal Division is June 1 – May 31; with renewals mailed in April. (Annual Membership Dues includes \$15 for a 1-year subscription to the *Texas Paralegal Journal*; if joining mid-year, the pro-rated dues of \$35 includes \$7.50 for a one-half year subscription to the *Texas Paralegal Journal*.)

Acceptance for membership in the Paralegal Division of the State Bar of Texas will not grant: [1] Certified Paralegal (CLA/CP/ACP, or RP) status to the applicant; [2] specialization by the Texas Board of Legal Specialization; or [3] any other certification or specialty which may be applied for through other state or national organizations.

I hereby apply for Active Membership in the Paralegal Division of the State Bar of Texas. I hereby certify that I am currently employed as a paralegal in the State of Texas, that I work under the direct supervision of a duly licensed attorney at all times, and that I qualify as a member under the category(s) checked below. I hereby give consent to the Paralegal Division to contact my present and/or former supervising attorney(s), education programs, and/or credentialing bodies for verification or clarification of my qualifications for membership, and I understand that if any information submitted in this application is false, it will be grounds for denial of my application. I have read the “Definition of a Paralegal” as herein stated and I have read the Division’s Code of Ethics and Professional Responsibility and, if accepted, I agree to be bound by the Division’s Bylaws and Code of Ethics.

**ANY APPLICATION NOT COMPLETED FULLY MAY BE DELAYED IN PROCESSING OR RETURNED TO APPLICANT FOR ADDITIONAL INFORMATION**  
**INSTRUCTIONS:**

1. Complete in **FULL**, all pages of this application. Attach CLE attendance records and any additional pages if necessary to complete answers.
2. Sign and date the application.
3. Make sure the Attorney Acknowledgment of Applicant is completed, signed and dated.
4. Keep a copy of the Code of Ethics for future reference and make a copy of your application for future reference.
5. Return the application along with a check or money order in the amount of \$70.00 (if applying February - October) or \$35.00 (if applying November - January) made payable to the Paralegal Division to the following address:

**Paralegal Division**  
Norma Hackler, Coordinator  
PO Box 1375  
Manchaca, TX 78652  
512/280-1776 (o) 512/291-1170 (fax)  
[pd@txpd.org](mailto:pd@txpd.org) [www.txpd.org](http://www.txpd.org)

**Did you remember to:**

- Complete contact info and personal data questions?
- List detailed job descriptions at your current job?
- Select any **AND ALL** applicable criteria for membership?
- Attach CLE attendance records?

Please note that an additional \$25 fee will be assessed when a check for dues is returned for any reason. **ATTACH A SEPARATE CHECK FOR EACH APPLICATION.** The approval process of your application will take approximately 30 days upon receipt. Thank you for your interest.

ACTIVE MEMBERSHIP APPLICATION

For Use by the Division:
Date Received:
District Number:
Date Approved:

Name: (Print your name and designation, as it should appear on your membership card)

Birth date: Social Security number:

Employer:

Current Business Mailing Address:

City: County: State: Zip: (9-digit code)

Office Phone: Fax: E-Mail Address:

Home Address: Home Phone:

City: County: State: Zip: (9-digit code)

Preferred Mailing Address: Home [ ] or Office [ ] Male [ ] Female [ ]

Have you been convicted, given probation (whether deferred or not) or fined for a felony or misdemeanor involving moral turpitude? Yes [ ] No [ ] Pursuant to Standing Rule 1.B.7., conviction of a felony offense (deferred or not), or a misdemeanor involving moral turpitude, makes an applicant ineligible for membership in the Paralegal Division.

Are you a former member of the Division? Yes [ ] No [ ] If yes, please provide your membership number: along with your former membership status: Active Associate Student Subscribing

Have you been a former member of the Division within the past twelve (12) months? Yes [ ] No [ ] If yes, please attach proof of six (6) hours of CLE. Pursuant to Standing Rule 1.I.2., if you have been an Active member within the past twelve (12) months, you must submit proof of six (6) hours of CLE and meet at least one of the membership criteria below.

Please list detailed current job functions/substantive areas of law that constitute 80% of your time (attach resume if space is insufficient to complete job description):

Please list your employers and each employer's phone number for the last three (3) years.

How did you hear about the Division?

Active Membership Criteria

To meet the Active membership criteria, at least one of the following categories must be answered in the affirmative. Please check only those criteria that apply to you. If you do not answer any of the answers in the affirmative, you may not be eligible for membership as an ACTIVE member. However, you may be eligible for Associate membership.

- a. Are you a Board Certified Paralegal through the Texas Board of Legal Specialization? Yes [ ] If yes, please give the year you became certified and the specialty:
b. Are you currently certified by the National Association of Legal Assistants or registered by the National Federation of Paralegal Associations and have one year of employment experience as a paralegal under the direct supervision of a duly licensed attorney? Yes [ ] If yes, please give the year you became certified or registered:

c. Do you have a bachelor's or higher degree in a field other than legal studies plus ten (10) hours of substantive continuing legal education within the past 12 months and one year of employment experience as a paralegal under the direct supervision of a duly licensed attorney? Yes [ ] If yes, give the name and address of school and the date of graduation: \_\_\_\_\_

**Note: Three (3) hours of the required ten (10) CLE hours may be self-study; the remaining CLE must be from on-site attendance, video, internet, CD ROM, or an approved paralegal program course. If yes, please list the date, provider, location, topic, speaker, and number of hours for the CLE. Please attach all CLE attendance records to your application.** \_\_\_\_\_

d. Have you completed an ABA approved program/college of education and training for paralegals and have one year of employment experience as a paralegal under the direct supervision of a duly licensed attorney? Yes [ ]  
If yes, give the name and address of school and the date of completion: \_\_\_\_\_

e. Have you completed a paralegal program/college that consists of a minimum of sixty (60) semester hours (or equivalent quarter hours) of which fifteen (15) are substantive legal courses and have one year of employment experience as a paralegal under the direct supervision of a duly licensed attorney? Yes [ ]  
If yes, give the name and address of the program and the date of completion: \_\_\_\_\_

f. Have you completed a paralegal program/college that consists of fifteen (15) semester hours of substantive legal courses and have two (2) years of employment experience as a paralegal under the direct supervision of a duly licensed attorney? Yes [ ]  
If yes, give the name and address of the program and the date of completion: \_\_\_\_\_

**If you have answered "NO" to all of the above, please see below for additional eligible criteria:**

g. Do you have a minimum of four (4) consecutive years of experience as a paralegal, under the direct supervision of a duly licensed attorney plus ten (10) hours of substantive continuing legal education within the past 12 months? Yes [ ] **Note: Three (3) hours of the required ten (10) CLE hours may be self-study; the remaining CLE must be from on-site attendance, video, internet, CD ROM, or an approved paralegal program course. If yes, please list the date, provider, location, topic, speaker, and number of hours for the CLE and attach CLE attendance records.**

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

**ATTORNEY ACKNOWLEDGMENT OF APPLICANT**

**DEFINITION OF A PARALEGAL**

A paralegal is a person, qualified through education, training or work experience, who is employed or retained by a lawyer, law office, governmental agency, or other entity in a capacity or function which involves the performance, under the ultimate direction and supervision of an attorney, of specifically delegated substantive legal work, which work, for the most part, requires sufficient knowledge of legal concepts, that, absent such assistant, the attorney would perform the task (*Adopted April 8, 2005, by the Board of Directors of the State Bar of Texas*). I HAVE READ THE "Definition of a Paralegal" as stated above and I hereby verify and acknowledge that I personally know the applicant, \_\_\_\_\_, and can acknowledge that the applicant is performing paralegal duties in the State of Texas and:

▶ \_\_\_\_\_ works under my direct supervision and performs specifically delegated substantive legal work for at least eighty percent of the time and that a licensed attorney is responsible for the Applicant's work product; OR

▶ \_\_\_\_\_ is a freelance paralegal who has performed specifically delegated substantive legal work under my direct supervision during the past six (6) months.

Name of Attorney: \_\_\_\_\_ Bar Card No: \_\_\_\_\_  
(Use one primary attorney only-print or type name)

Firm: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Attorney's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**CODE OF ETHICS AND PROFESSIONAL RESPONSIBILITY OF THE  
PARALEGAL DIVISION OF THE STATE BAR OF TEXAS**

**Preamble**

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

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

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

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

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

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

Canon 4. A paralegal shall preserve and protect the confidences and secrets of a client.

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

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

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

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

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

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

Paralegal Division/ State Bar of Texas  
Adopted March 27, 1982, revised June 23, 2005

Rev. 02/2009  
Active Membership Application /Page 4

PARALEGAL DIVISION  
STATE BAR OF TEXAS



PARALEGAL DIVISION  
STATE BAR OF TEXAS  
STUDENT MEMBERSHIP APPLICATION

Date Received: \_\_\_\_\_  
District No.: \_\_\_\_\_  
Date Approved: \_\_\_\_\_

TO BE FULLY COMPLETED BY APPLICANT:

(Dues \$35.00 per year. An additional \$25 fee will be assessed for a check marked "return unpaid.")  
(Annual Membership Dues includes \$15 for a 1-year subscription to the *Texas Paralegal Journal*; if joining mid-year, the pro-rated dues of \$17.50 includes \$7.50 for a one-half year subscription to the *Texas Paralegal Journal*.)

I hereby apply for student membership in the Paralegal Division of the state bar of Texas. I hereby certify that I am currently enrolled in an accredited Texas paralegal program leading to a degree or certificate of completion. I hereby give my consent to a representative of the Paralegal Division to contact the administrator of this program for verification or clarification of my qualifications for membership, and I understand that if any information submitted in this application is false, it will be grounds for denial of my application.

Name: \_\_\_\_\_ Male ( ) Female ( )  
(Print your name as it should appear on your membership card)

Date of Birth: \_\_\_\_\_ Social Security No.: \_\_\_\_\_

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

City: \_\_\_\_\_ County: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

Paralegal Program/College Attending: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ Administrator: \_\_\_\_\_

Expected date of graduation: \_\_\_\_\_

Length of Program: \_\_\_\_\_ Hours/Semesters Completed: \_\_\_\_\_

Have you been convicted of a felony offense? Yes ( ) No ( )  
*Pursuant to Standing Rule 1.G.4., conviction of a felony offense (deferred or not), or a misdemeanor involving moral turpitude, makes an applicant ineligible for membership in the Paralegal Division.*

How did you hear about the Division? \_\_\_\_\_

Rev. 11/2006

To meet the membership criteria, one of the following categories must be answered affirmatively.  
**NO HOME STUDY, VIDEO OR CORRESPONDENCE COURSES WILL BE ACCEPTED.**

- a. Are you currently enrolled in an ABA approved program/college of education and training for paralegals?  
Yes ( ) No ( )
- b. Are you currently enrolled in a paralegal program/college that consists of a minimum of sixty (60) semester hours (or equivalent quarter hours) of which fifteen (15) are substantive legal courses? Yes ( ) No ( )
- c. Are you currently enrolled in a paralegal program/college that consists of fifteen (15) semester hours of substantive legal courses? Yes ( ) No ( )

**I understand that I may apply for active or associate membership at such time as I satisfy the criteria for that membership by submitting a current active/ associate application but that as a student member, I may not vote, hold office or serve in a voting capacity on any committee. I agree to be bound by the Division's Code of Ethics and Professional Responsibility.**

DATE: \_\_\_\_\_ STUDENT SIGNATURE: \_\_\_\_\_

**ENROLLMENT VERIFICATION**

I hereby verify that \_\_\_\_\_ is currently enrolled in the paralegal program at \_\_\_\_\_ and is a student in good standing with this institution.

DATE: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_  
Title: \_\_\_\_\_

**APPLICANT, DID YOU REMEMBER TO:**

- 1. Complete in **FULL**, all pages of this application
- 2. Sign and date the application.
- 3. Make sure your school administrator signs and dates the verification.
- 4. Keep a copy of the Code of Ethics for future reference.
- 5. Make a copy of your application for future reference.
- 6. Return the application along with a check or money order in the amount of \$35.00 (if applying February - October) or \$17.50 (if applying November - January) made payable to the Paralegal Division to the following address:

Norma Hackler, CMP  
Coordinator, Paralegal Division  
P. O. Box 1375  
Manchaca, TX 78652

512/280-1776 (o)    512/291-1170 (fax)  
e-mail: pd@txpd.org    web site: www.txpd.org

**Please note that an additional \$25 fee will be assessed when a check for dues is returned marked "return unpaid."**

The approval process of your application will take approximately 15 days upon receipt. Thank you for your interest in joining the PARALEGAL DIVISION.

Rev. 11/2006

CODE OF ETHICS AND PROFESSIONAL RESPONSIBILITY OF THE  
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Preamble

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Paralegal Division/ State Bar of Texas  
Adopted March 27, 1982, revised June 23, 2005

## **Is 'One File At A Time' Realistic?**

**Ideally, you work on one matter at a time with only materials relating to that one matter on your desk. The key here is “ideally.”**

This principle might work in a perfect world, but the legal environment is far from perfect. A paralegal's real world includes deadlines, chaos, interruptions, emergencies (actual and imagined), last minute projects, trials and, worst of all, other people's disorganization.

Piles, often not of our doing, become part of the landscape of our desks. We start one project, another is dumped on us, then another, and eventually we're working in layers. It's amazing that paralegals remain productive at all. If it weren't for our innate abilities to organize and prioritize...as well as juggle...productivity would be nonexistent.

**What can you do to deal with this madness?** Here are tips that will help you remain organized through the chaos and come very close to having only one file on your desk at a time:



**1. Place files in an incline file sorter.** Instead of piling files on top of each other so that you can barely tell one from the other, stand them in an incline file sorter on or near your desk. With this simple organizational tool, you'll be able to locate files in a snap. This is particularly helpful for files you'll be working on in the next day or so.

**2. Take only what you need to get the job done.** Encourage fellow workers (as in the attorney(s) you work with) to give you only as much of the file as is necessary to complete an assignment. For instance, you don't need the client's entire red rope file to schedule three IMEs in the Work Comp case. If you have a deposition to summarize, you'll probably only need the transcript.

**3. Try to control when you're given work.** Receiving work all day long as the spirit moves your boss is inefficient. Instead, try to schedule regular meetings with your boss, such as first thing in the morning and/or immediately after lunch. At those meetings, you should receive work assignments; discuss any assignments you are working on, etc.

**4. Create temporary files.** If an assignment is accompanied only by a loose letter or document, make a temporary file for it. Use a Sharpie to write enough information on the label or on the front so that the item can be easily identified and won't be lost in the next wave of files that appear on your desk. Put this temporary file in the incline file

sorter until you're ready to work on it.

**5. Become an instant decision maker.** When an assignment, a document or a file comes into your office, decide immediately how to deal with it. Never place it in the 'put it here for now' pile. That pile will just continue to grow.

If whatever you've been given to do won't take long, take care of it right then and there. You've already been interrupted so you might as well complete the task before you go back to your work.

If you don't need to do it immediately, put it away, or place it in the incline file sorter.

Do you have a stack of professional journals, magazines and newspapers on your desk that you intend to read 'some day'? Unfortunately, the stack keeps growing and 'some day' never comes. Again, review those materials as soon as they come into your office. If there's an article you want to keep, tear it out and file it. If there's nothing of interest, throw the material away or recycle it. Remember that most of this information is available on the Internet should you need it so there's probably no need to keep articles.

**6. Prioritize all day long.** As work comes in, make a decision about when you will act on it. Don't just put it in a pile to think about later. If you allow the chaos to accumulate, it will quickly overwhelm you. The disorder may stop you from getting your work done because it's such a mess you don't know where to start. The perfectionist in you will just give up. It's easier to make a phone call or check your email than to figure what's in that swelling stack of papers and files.

**7. Ask for clear deadlines.** Your work will probably fall into one of three categories: do it right now, do it in the next few days and do it sometime in the future.

==> **Do it right now.** Close up what you are working on, place the material in the incline file sorter, and begin the new work. This interruption is not the most efficient but it's the way the real world operates.

==>**Do it in the next few days.** Note the deadline in your planner or on your calendar and place the file in the incline file.

==>**Do it sometime in the future.** If something isn't due for a couple of weeks, you're probably safe to put it away in the file drawer. However, be sure to make a note on your calendar when the work has to be done and when you should begin working on it.

**8. Never trust your memory!** Take copious notes when someone gives you an assignment but do not use sticky notes! Sticky notes just multiply and either get lost or you become so accustomed to them that you don't even see them.

Instead, use a shorthand notebook for your notes. Begin a fresh page every day, placing the date at the top. On the left side of the line, write the name of the client, client

number, or whatever information you need to identify the work you'll be doing. On the right side of the page, make your notes.

Again, be sure to ask for clear deadlines. If you do receive an assignment with a deadline of two or more weeks away, you'll probably want to put the file away so that it's not taking up space on your desk for days on end. Be sure to enter a reminder on your calendar for the date you need to begin working on the project.

Never put a file out of sight in a drawer without a reminder to yourself to do that work. The adage, 'out of sight, out of mind' applies when you're very busy.

**9. Get those files back to their 'owners':** As soon as you finish a project, move those files off your desk. Don't let them languish there for one minute more than you need them. If they can be closed, all the better.

**10. Establish routines.** The importance of establishing routines for beginning and ending your work day can't be overstated.

At the beginning of your day, review your list of work to do, retrieve the file you will work on first and get going. As other files come to you throughout the day, either put them in your file cabinet or in the incline file sorter. Remember that your floor and client chair do not qualify as file cabinets.

At the end of the work day, consider what has to be done during the next one and make a quick list. No. 1 on the list should be the most pressing work, the work with a deadline. Prioritize your work this way.

Then close up the work you're doing and either (a) leave the file on your desk or (b) put it in the incline file. You might flag it with a bright sticky note (a sticky note is a good thing when you're using it this way).

Your desk will be cleared and you will not be welcomed by chaos and overwhelm when you begin the next day.

**Your challenge:** Consider the ten tips above and decide which you can incorporate into your daily routine. While you may never quite accomplish having only one thing on your desk at a time, you can minimize the chaos, disorder and confusion by taking even one or two of these steps. Whatever you choose to do, you're bound to improve your workspace and increase your productivity. ■

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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*. More information is available at [www.paralegalmentor.com](http://www.paralegalmentor.com)



## U.S. Constitution Crossword Puzzles: Basic #2 (Continued)

### ACROSS

- John \_\_\_\_: Vice President under Washington; also second President of the United States.
- Benjamin Franklin attended the Constitutional Convention as \_\_\_\_ of Pennsylvania.
- Article \_\_\_\_ of the Constitution describes the relationship between the states and the federal government.
- The Supreme Court is the highest court of \_\_\_\_ in the United States.
- The president is the \_\_\_\_-in-chief of the U.S. Army and Navy.
- We celebrate the 4th of July because it is \_\_\_\_ Day.
- Military force made up of civilians called upon during special emergencies; today would be called the National Guard.
- Article \_\_\_\_ of the Constitution tells how the Executive Branch of government should work.
- One of the 13 original colonies.
- John \_\_\_\_ was an English leader whose courage and wisdom saved Jamestown from failure.
- Congress makes the \_\_\_\_ laws in the United States.
- The \_\_\_\_ of the House of Representatives becomes president of the U.S. if the president and the vice president should die.
- The Committees of Correspondence were patriot groups organized in each colony to \_\_\_\_ information.
- Term applied by the British to the colonists because they refused to obey the king's orders.
- There has been \_\_\_\_ (hyphenated word) changes or amendments to the United States Constitution.
- One of the 13 original colonies.

- One of 3 branches of the United States government.
- One of 3 branches of the United States government (or -ial)
- The \_\_\_\_ (or CT) Compromise established that the House of Representatives would be based on population and the Senate would be based on equal representation.
- The duty of the Supreme Court is to \_\_\_\_ laws.
- The name of the ship that brought the Pilgrims to America is "The \_\_\_\_."
- George \_\_\_\_ is called "the father of our country".

### DOWN

- The \_\_\_\_ Court is the highest court in the United States.
- One of the two houses of Congress historically known as the upper house.
- What country did we fight during the Revolutionary War?
- The \_\_\_\_: The introduction to the United States Constitution.
- July 4, 1776: Day the \_\_\_\_ Continental Congress adopted the Declaration of Independence.
- The \_\_\_\_ signs bills into law.
- The 13 original states of the United States were called \_\_\_\_.
- The electoral \_\_\_\_ elects the president of the United States.
- What is the name of the president's official home? The \_\_\_\_ (two words).
- Patriot soldiers who were prepared to assemble quickly from their homes when needed.
- One of the 13 original colonies (two words).
- What are the first ten amendments to

- the Constitution called (three words)?
- One of the 13 original colonies.
- Article \_\_\_\_ of the Constitution tells how the Judicial Branch of government should work.
- Hired soldiers who serve in a foreign army, e.g., the (German) Hessians used in the Revolutionary War by the British.
- The president who freed the slaves was Abraham \_\_\_\_.
- The Constitution of the United States is the supreme \_\_\_\_ of the land.
- The national anthem of the United States is "The Star \_\_\_\_ Banner".
- One of the 13 original colonies.
- One who loves their country, e.g., supported the American cause of independence.
- The Constitution of the United States was written in 178\_\_\_\_.
- The governmental philosophy in which the people ideally have a high degree of control over political leaders.
- One of 3 branches of the United States government.
- Article VII of the Constitution describes how the Constitution would be \_\_\_\_.
- How many states are there in the United States?
- Two of the 13 original colonies were North and South \_\_\_\_.
- The lower house of Congress in which states are represented based on \_\_\_\_ is the House of Representatives.
- Who has the power to declare war?
- Congress meets in the \_\_\_\_ in Washington, D.C.
- John \_\_\_\_: First Chief Justice of the United States Supreme Court.
- The \_\_\_\_: The special group that advises the president.

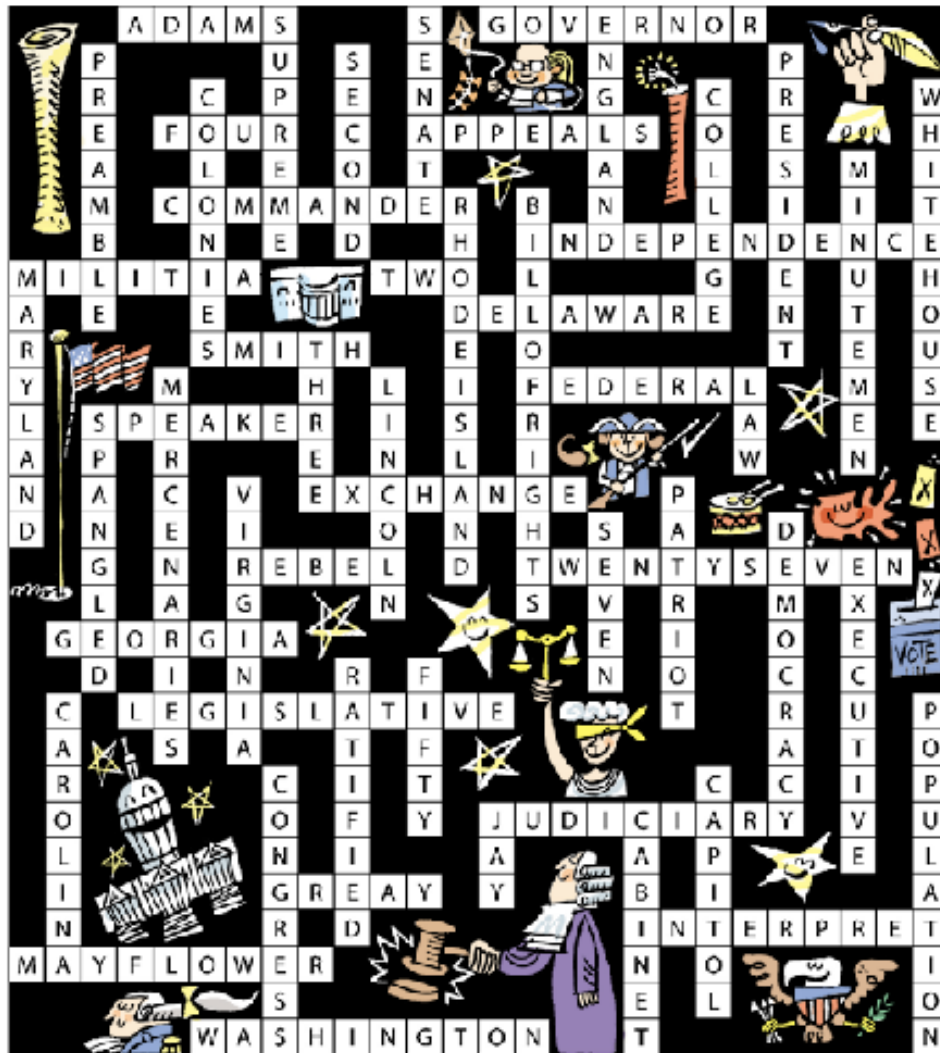


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U.S. Constitution Crossword Puzzles: Basic #2



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