



OC-ALA's Waves

Spring Edition
2018

Diamond
Business Partner



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President's Message

Jennifer Bodenhoefer
OC-ALA Chapter President 2018-2019

Welcome to OC-ALA's 2018 Spring Edition of *Waves*! Please click on the image below to connect to our President's video message.



Jennifer Bodenhoefer
President 2018-19

Emerald Business Partners



Business Partner Spotlight

TFG BENEFITS

As a brand-new Business Partner with OC-ALA, Tax & Financial Group Benefits is very happy to have an opportunity to share some information regarding our company, philosophy and key people in this edition of the *Waves*.

TFG Benefits is an Employee Benefits Brokerage that works with small to mid-size companies and is located in Newport Beach. The company was founded in 1998 by Mark Garvin and Brian McCloskey. Combined, Mark and Brian bring to the table over 50 years of experience in the employee benefits industry. We have an intensely strong commitment to developing long term relationships and delivering the highest level of service. Overseeing the service team is Nicole Hamilton who is the Director of Operations and has been with TFG Benefits for over a decade.

Outlined below are some of our valuable services:

Benefits Consulting:

- Market analysis and carrier/vendor renewal negotiations
 - ◇ Medical Insurance
 - ◇ Dental Insurance
 - ◇ Group Life & AD&D
 - ◇ Disability Insurance
 - ◇ Vision Plans
 - ◇ Voluntary Benefits
 - ◇ Wellness Plans
- Employer contribution strategy
- Budget analysis
- Industry benchmarking

Benefits Administration:

- Enrollment and eligibility
- In-House COBRA services
- FSA & HRA Administration

Client Services:

- Dedicated client service representative assigned to each company to assist with day to day issues.
- 800 Employee Advocacy Hotline and direct email address for employees to utilize for assistance, i.e., benefits questions, doctor searches, help with claims, employee advocacy, etc.

Plan Implementation & Communication:

- Employee education meetings conducted by our in-house bilingual enrollment team
- Preparation of customized employee enrollment kits
- Online enrollment

Compliance:

- Mandatory employee notifications and employer filings
- SPD/Wrap Documents
- Premium only plans
- ACA Reporting Forms, i.e. 1094's and 1095's

HR Support:

- HR audit
- HR Support hotline to certified HR Specialist
- HR outsourcing
- HRIS/HR Technology Consulting and Support

We want to help! Please contact us if you have questions or needs related to your current employee benefits program. We are happy to answer questions or to provide a market analysis on a complimentary basis.



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Nicole Hamilton, Director of Operations
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CLMSM Exam - The Journey

It's human nature to be hesitant about taking an exam - anxious and preoccupied about whether we will pass or not. Questions ALA Certification Committee members are often asked in the CLMSM booth during the ALA Annual Conference & Exposition typically have to do with obtaining the suggested reference material, what to study when there are so many areas of knowledge to be tested, and how "hard" the questions are.

In reflecting on our own study journeys and sitting for the exam, we, the members of ALA's Certification Committee, completely understand and relate to why so many members ask these questions. *When the committee writes exam items, we use as a frame of reference what a principal administrator, upon visiting a 30-50 attorney firm and reading the firm's particular practices and procedures, would need to know to be able to offer advice in the many knowledge areas relevant to legal administration.*

Most of us spend a good part of our days fielding a wide variety of questions from lawyers and support staff. Isn't it interesting how, even though most of us are in defined roles, we are expected to know everything about everything? Quite frankly, the majority of what we do is not confined in the black and white box of a job description. We have to become comfortable working in a world of gray - thinking on our feet and adapting to the needs of the moment. It is in this world of gray that we discover the importance of widening and improving our skill sets, seeking more education in all areas of the legal profession. By continually building and improving our skills in law firm administration, we are able to appropriately handle the variety of questions we receive, from technology to insurance,

accounting, human resources and business management.

The drive to improve our skills and seek continuing education to become more proficient in our jobs has motivated many of our members to seek certification. *While seeking certification is a big goal, the "journey" is what helps to improve our competency.* Many members have shared their journey with the committee, which often begins by navigating the vast set of reference materials listed in the CLMSM examination application packet that apply to the job of a legal administrator. Then they assess the areas where they are most comfortable and those where additional preparation is required. While everyone's journey will differ with respect to preparation, the *key for most is to focus on one's weak areas, reviewing reference materials, seeking outside resources such as articles in various legal management-related publications, and in some cases, joining a CLMSM Study Group.* Our diverse backgrounds and different strengths and weaknesses in the core areas of knowledge make Study Groups a great way to assist in the learning process and, in most cases, it can be a great deal of fun! Many have found that the Study Groups and/or a combination of different preparation techniques, with regular repetition, have definitely improved their skills AND their confidence.

Exam preparation is a personal endeavor, and each person has his or her own comfort zone and learning preferences for how to prepare for the exam. Take the road that best works for you to become more comfortable with the material in each of the core areas. We are not expected to be "experts" in each area, but rather "conversant" in each area of knowledge. And while knowledge is important, applying the knowledge is essential. *Understanding how to apply what you have*

Accounts Receivable, Billable Hours, and Collections: The End Game or a Starting Point for Law Firm Success?

By Ariela Tannebaum,
Advanced Financial Analytics, CEO



When it comes to financial performance, most small to mid-size law firms know their ABCs: Accounts receivable (keep ‘em low!), Billable hours (keep ‘em high!), and Collections (100% would be nice!). But true financial intelligence – and the success that flows from it – requires more. It is not enough for firms to zero-in on a snapshot of these three predominant measurements of financial success because, while important, they only tell part of the story.

Imagine yourself driving a car, but only able to see what appears in your rearview mirror; no forward view of the road beyond, no speedometer, tachometer, gas gauge, navigation system, compass, thermometer, park assist . . . you get the picture. You might have a pretty clear sense of where you’ve been, but where you are headed and the hazards that lie up the road are anybody’s guess. Likewise, a law firm may have a highly-competent bookkeeper, accountant, controller, or even a Chief Financial Officer to serve the essential role of digesting and presenting a firm’s past financial performance to leadership, but what is too often lacking is a forward-thinking, strategic plan that goes markedly and meaningfully beyond the “What have we billed? What have we collected? What are we owed?” paradigm that inevitably leaves you one step behind.

The good news for you, the Managing Partner, is that you can take advantage of what your C-level colleagues in the corporate realm do to gain the essential “financial intelligence” your firm needs to meet its full profit potential. Fortune 500 companies have long-relied on sophisticated financial tools to chart their financial success, and those same tools can

be scaled and applied to law firms.

Before you can put those tools to use, you must stop seeing your law firm as a *practice* and start running it as a *business* – a profit-driven entity with a forward-looking vision *and* a realistic, operative plan for success. Consider whether you can answer the following questions in confident detail:

1. What is the profit margin of the firm?
2. What has been the profitability trend of each one of your practice areas over the last three years?
3. Do you have an actionable plan to “fix” the weaker practice areas and enhance the stronger ones?
4. How do you optimize pricing in response to the increasing demand for alternative fee arrangements?
5. What is the revenue loss associated with discounted billing hours and rates? Is there an upward or downward trend?
6. What is the profitability of top ten clients?
7. How will a potential departure of a partner impact bottom-line profitability?
8. What is your firm’s financial outlook for the next 6 to 12 months?

A managing partner who cannot answer these questions will never break out of the all-too-common cycle of perpetually playing Monday-morning quarterback.

So how do you arm yourself with the data needed to answer these and other key questions and finally



learned the material during your journey.

When it comes time to sit for the exam, get a good night's sleep the night before and try to arrive relaxed. It is normal to be anxious, but the key is to stop worrying, calmly review each question, and let the knowledge come through.

Remember, your journey to sitting for the certification exam is just as important as taking the exam. Whether you pass or not, you have certainly improved your

knowledge and skills that you can bring back to your law firms and put into practice. If you do not pass the exam, please don't give up! Your exam results will indicate the areas in which you need to improve. Go back and begin the journey again because it will be the best investment you will ever make in yourself.

Now, let your journey begin!

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Accounts Receivable, cont. from page 5

break out of the backward-looking cycle once and for all? You employ the corporate world's sophisticated financial tools to convert your accounting data and trends into management insight. This will allow you to concisely identify the direction your firm is heading, its strengths and shortcomings, risks, and opportunities so that you can consciously and purposefully act to increase profitability.

To truly run your firm as a profit-maximizing business, you must have a pragmatic, yet holistic, overview of the firm's operations, and be thoroughly informed of all performance indicators at all times – so that you can take prompt, decisive action to stay on course to meet your financial objectives.

Your disciplined monthly or quarterly review should include at least the following reports:

- Year-to-date P&L results and projections
- Profitability by attorney, practice area, industry, client, and office
- Expense analysis
- Profit margin per matter
- Firmwide utilization and realization trend analysis

- Utilization and realization by attorney
- Potential upside/downside to profitability
- Benchmarking

It is only with these tools that a firm can properly allocate resources and investments to increase revenues, decrease costs, and maximize profits.

Of course, change is hard. And sometimes a true picture of a firm's finances can spark delicate and potentially explosive intra-firm politics. It is prudent to have a third-party, consultant approach the analysis with a truly objective outlook. The resulting analysis should provide you with a measured assessment of the firm's present state, a detailed plan of how to reach its financial objectives, and a clear path to maximize profits. Furthermore, just as essential as a plan, it is imperative to develop a discipline that will keep your firm on track of meeting your financial objectives.

Rather than read the ticker tape to learn what has already transpired within your firm, put the basic financial measures of your business to work. Proactively pursue a command of *financial intelligence* to lead your business to achieve true success. 🍊



Business Partner Spotlight



WAMS, INC. Wanting All Members Secure

At WAMS, we are proud to celebrate that we have been a Business Partner of the OC-ALA for more than two decades. Many OC-ALA members are valued clients of WAMS, and we have truly enjoyed the wonderful relationships we have developed with OC-ALA members. This past year, we have had SO much fun with the OC-ALA. We had an absolute blast listening to the talented children at the House of Blues, bowling at Bowlmor Lanes, and getting a few of you to play cactus ring toss with us at ACES! But, of course, one of our favorite things to do is getting to know members better, and for all of you to get to know us better. We are thrilled to meet someone new and receive the inquiry, “What is WAMS?” or “What does WAMS do?”

Many of you may not know that WAMS is an acronym, and stands for “Williams Automated Management Services.” WAMS is a boutique IT company dedicated to providing outsourced IT support for our clients. Over 95% of our clients are law firms in Orange County and Los Angeles. We have been providing solutions to law firms since our doors opened in 1974.

WAMS provides a number of IT services including cloud computing, backup and disaster recovery, IT projects and upgrades, training, and more! Most recently, our security and cloud computing solutions have been the most vital ways that we have helped our clients achieve their technology objectives and keep their networks secure. This past year we have expanded our team and continue to advance our services, solutions, and support.

Beginning 2016 to present, we have expanded our Network Operations Center (NOC), and our NOC team

works day in and day out to ensure that our clients’ backups are successful every single day. They also ensure our clients’ servers are monitored and routinely updated with the latest security patches and updates. We continue to grow our help desk, now with eight team members, all hired out of law firms. This allows WAMS to answer your support requests live from 7am – 6pm Monday-Friday.

WAMS CloudConnect 2.0

WAMS CloudConnect 2.0 has taken our CloudConnect solution to the next level. Our new solution allows us to offer Windows 10 Themed desktops utilizing shared Windows 2016 Server sessions in order to stream your suite of business applications to any device you choose. We know that you are busy managing your firm, your staff is working hard on behalf of your clients, and the last thing you want to do is worry about IT responsibilities. Your time should not be wasted adding and deleting users, worrying about security when a device is misplaced or stolen, or maintaining and updating individual desktops and applications. CloudConnect has been an important solution service that we offer our clients to eliminate those aforementioned tedious tasks. In this day and age, attorneys are becoming more and more mobile and they want to work from their favorite devices. Whether they are working from a client’s office, a hotel room, or at home, we provide the ability to access your network from anywhere on any device while keeping your network always available, secure, and compliant. Your entire staff can stay productive, and most importantly, billable.

WAMS, cont. on page 8

WAMS Security Services

It is no secret that there are more cyber threats targeting small businesses and law firms than ever before, and these numbers seem to increase by the second. According to Symantec's 2017 Internet Security Threat Report, "The average profit per victim for a ransomware author jumped from \$294 in 2015 to \$1,077 in 2017 - a 266% increase." A review by IBM Security concluded that ransomware messages are up 6,000% from 2016 to 2017. Many smaller firms believe that cyber-attacks will not happen because they are so small. This way of thinking is flawed because although your firm may be small, your clients' data is confidential, valuable information, and cybercriminals know it. Client liability insurance has become more and more important for law firms, and with our solutions you stay compliant and decrease your firm's liabilities by a landslide. We help your firm to stay protected with vulnerability and penetration testing, and then provide you the correct solutions to strengthen your online security. We provide solutions from Mimecast and Sonicwall,

and design multiple layers of security on all servers and desktops we protect and manage so that all of your bases are covered.

We choose to offer a unique approach with our clients as we keep our implementation agreements friendly and flexible to take advantage of opportunities that will benefit both the client and WAMS. We will never ask a client to sign any long term contract or agreement. From start to finish, WAMS cares about your business and we have made it our mission to support you to be as successful as you can be.

If you have any questions, please reach out by emailing info@wamsinc.com or calling 800-421-7151. We look forward to another fantastic year with the OC-ALA!



Ashli Lopp
Marketing Manager
WAMS, Inc

Large Firm Principal Administrators Retreat

August 2 - 4, 2018



Hotel Del Coronado
San Diego, California

The Large Firm Principal Administrators Retreat is the place where leaders from law firms of 100 or more attorneys come together to learn best practices and gain actionable insights that they can immediately leverage to master the challenges facing large firms today.

You will draw from the experiences of high-caliber participants to gain new insights for addressing changes in the business of law. Case examples and discussions with other accomplished law firm executives will be used to present theory, conceptual knowledge and real-world application. This combination provides an unparalleled learning experience in a comfortable, open environment.

The retreat's schedule also includes time for valuable networking opportunities and social events.

Want more information? Join the mailing list at <http://my.alanet.org/signupform.asp>





Gold Business
Partners



Administrator Spotlight

Ariela Tannebaum,
Advanced Financial Analytics, CEO



Ariela Tannenbaum has over 25 years of top tier leadership experience working with firms and global Fortune 500 companies. This experience is the foundation of Advanced Financial Analytics LLC.

Ariela has instilled the financial intelligence and discipline used by the most successful companies in the world to drive performance and enhance the profitability of law firms. Her comprehensive financial experience includes forecasting, budgeting, expense management, compensation, partner's profit distribution, proper resource allocation, fee optimization, benchmarking, and risk and opportunity assessment.

Ariela served as an Executive Vice President, Global Head of Finance-PIMCO at Allianz for over 14 years. PIMCO, a subsidiary of Allianz, a Fortune 50 company, manages \$1.5 trillion in assets. She was responsible for over-seeing corporate finance activities including strategic planning and budgeting, forecasting, financial management reporting and analysis for the firm's worldwide operations.

Prior to PIMCO, Ariela served as Vice President, Finance, Global Head of Planning, Analysis and Budgeting at Edwards Life Sciences, a global biotech leader and a controller and Global Head of Financial Planning and Analysis at Western Digital Corporation, a Fortune 500 global high-tech leader.

Ariela has a Bachelor of Arts in Mathematics, with honors, an M.B.A. with honors, and Certificate of Leadership from Harvard Business School.

Ariela serves on the advisory boards of the UCI School of Law and School of Business and is a member of the Dean's Leadership Circle.

Ariela served in the Israeli Air Force as an air traffic controller and obtained her pilot license.

Ariela, married and a mother of three, resides in Newport Coast, California. 🍊





Administrator Spotlight

Deborah Miller,
Aitken Aitken Cohn

Deborah Miller has spent her entire legal career working for one of Orange County's most well-known and accomplished trial attorneys, Wylie A. Aitken. Deborah began working as a litigation paralegal for Wylie in 1986, after being hired by the firm's administrator at the time, OC-ALA Charter Member Jill Traut. OC-ALA Charter Member, Karen Anderson then assumed administrator duties at the firm until 2012.

In 2012, Deborah transitioned to a new role as an executive paralegal focusing on all aspects of Mr. Aitken's legal, charitable and philanthropic activities using her extensive legal background and ability to develop client relationships. Since 2015, Deborah has served as the firm's Office Administrator. In this role Deborah oversees all managerial aspects of the firm, including marketing, organizational development, case management systems/IT, human resources, finance, benefits administration, insurance, vendor negotiations and promotional events.

Deborah's longevity at the firm can be traced to the firm's emphasis on family. The firm is regularly recognized as one of the top family businesses in Orange County, and the sense of family has always extended to the firms' employees. This emphasis on family allowed Deborah to receive an extended maternity leave when she had her two children.

Deborah's litigation work has included working directly with Mr. Aitken, on many significant legal matters, not only helping achieve justice for clients, but also impacting changes in the law.

Deborah has always placed a very high priority connecting with and helping families during the challenging times following a catastrophic, life-altering incident. Deborah's ability to connect with and comfort clients and their families allows her to provide guidance to deserving clients during some of their darkest days. Deborah develops relationships that transcend the duration of the legal matter and has provided her with countless friendships spanning decades. Deborah's gift of connecting and communicating also pervades her interactions with colleagues in the office, with whom she enjoys building relationships and mentoring. This includes emphasizing the importance of work-life balance and providing firm employees with individual professional development opportunities, in order for them to achieve their highest potentials.

Deborah has enjoyed tremendous support and encouragement from former firm administrators, and from Wylie himself, and she relishes the chance to pay this opportunity forward to all firm employee—providing them with meaningful and fulfilling career experiences, while balancing family.

Deborah is an avid runner, loves Sunday dinner with her family, sailing, gardening, reading and watching movies.



Silver Business Partners





Administrator Spotlight

Briley Harrison,
Sullivan Law & Associates

Briley Harrison has been the Administrative Manager for Sullivan Law & Associates for approximately 6 months. Her position requires her to wear many hats. She helps in the hiring process, training and management of employees. She creates and enforces policies and procedures, manages back office work flow, and assists attorney's and paralegals with any legal tasks.

Briley has been working in the legal field for six years. Her father has been an attorney for 30 years and would always talk to her about some of his most interesting cases. When she graduated high school, she begged to work for him and he finally agreed to employ her as his file clerk and secretary. After about a year of working for him, they both moved to a bigger firm. She spent a few years working for that firm as a file clerk, until Richard Sullivan, the founding partner of Sullivan Law & Associates, opened his own firm. Richard and his son Matthew saw Briley's potential and promoted her to administrative manager and legal assistant. This encouraged Briley to go back to school to obtain her paralegal certificate.

Briley enjoys working with all the staff and learning how each individual employee thinks and works. She enjoys figuring out how to fix specific issues and creating better work flow within the office so that everyone's work life is a little easier and they can represent their clients well. She also thoroughly enjoys the organizational side of being the administrator.

Briley understands that different personalities can be difficult to work with, especially when there is a change in policies or procedures. However, she finds it gratifying to see staff realize why the change was needed and how it will help their work flow better on a day-to-day basis.

The hardest situation Briley has had to deal with was when the office had to move locations. There are a lot of moving parts when it comes to moving and it takes a lot of planning.

Briley most admires her father because he taught her to believe in herself and that hard work pays off. Her father has supported her in everything she does and has always been there for her. His parental approach has been to allow his children to go out and explore the world through their own eyes and if any of them tripped, he was there to catch them and encourage them to keep going. She loves talking to her father about her day, her struggles, her accomplishments and just about anything because he has so much wisdom. He always has something to teach her and she is always ready to listen.

Briley recently received her cosmetology license. When she is not at the office, she spends time in the salon, with friends, or relaxing at home. She loves doing makeup, shopping for shoes, clothes or beauty products. 🍊





General Management

The Problem with Parking (and other Fringe Benefits) Under Tax Reform

By Sherrie Boutwell
Boutwell Fay, LLP

It may be time to renegotiate your office lease. Here is why - the 2017 Tax Cuts and Jobs Act¹ broadly disallows employer deductions for “qualified transportation fringe benefits” such as employer paid parking. In addition, it requires certain tax-exempt employers to treat specified fringe benefits, including employer paid parking and other qualified transportation benefits² as being subject to “unrelated business income tax” (“UBIT”) resulting in a tax on the organization (generally at a 21% rate).

Background

Prior to 2018, employer paid parking was not a “hot topic.” For profit employers were generally able to deduct parking expenses for their employees under Code Section 274 and employees were generally able to exclude “qualified transportation benefits” such as employer paid parking or mass transit passes from their taxable income under Code Section 132. That Code Section also allowed (and still allows) employees to pay for their own parking on a pre-tax basis via a salary reduction election.

Beginning on January 1, 2018, the Tax Cuts and Jobs Act completely changed the tax rules for employer paid parking. Now, for tax-exempt and other employers, (especially those located in a major metropolitan area such as downtown Los Angeles, where most employees drive to work and free parking is virtually non-existent), the tax consequences of employer paid parking are a big deal.

Changes under the Tax Cuts and Jobs Act

The Tax Cuts and Jobs Act makes two statutory changes that affect employer paid parking:

1. **Loss of deduction** (for profit employers). Code Section 274 was amended to prohibit any deduction by an employer for “qualified parking” for an employee. “Qualified parking” is defined as parking at or near the business premises of the employer (or a park-n-ride type facility); and
2. **Unrelated Business Income Tax** (certain tax-exempt employers). Code Section 512(a) was amended to subject employer paid parking and other qualified transportation benefits to the unrelated business taxable income rules. Employers subject to those rules must file a Form 990-T and pay a 21% tax³ on amounts paid or incurred for “qualified parking” or with respect to any parking facility used in connection with providing qualified parking to its employees (and may have related obligations to make estimated tax payments).

What can Employers do?

Employers do have some choices, although further guidance from the Internal Revenue Service will be

¹ P.L. No. 115-97.

² Certain athletic facilities are also included in the new tax, but a discussion of those is beyond the scope of this article.

³ The actual rate will depend on whether the organization is a corporation or a trust and excludes amounts related to an actual trade or business regularly carried on by the organization.

needed to clarify the tax treatment of certain approaches:

1. **Stop paying for employee parking/start charging employees for parking or mass transit/treat amounts paid for parking or mass transit as wages and report on Form W-2.** This approach will not work for many employers. First, this may not be possible if local laws require an employer to provide “qualified transportation benefits.” Second, it may not be tenable for employers fighting for talent in today’s tight labor market. And, even if permitted under local law, and in the employer’s best interest, employers will still want to check employee handbooks and employment agreements before eliminating an expected benefit.
2. **Establish a “qualified transportation plan”** that allows employees to pay for their own parking on a pre-tax basis through salary reduction. Even with a salary reduction plan, the employer may still lose its income tax deduction and a tax-exempt employer may still be subject to UBIT. This is because under a salary reduction arrangement, the employer agrees to forgo paying salary, and instead of paying salary is agreeing to pay for parking. See Treas. Reg. Section 1.132-9, Q&A-11 and Revenue Ruling 2004-98⁴. Note – the regulation that allows salary reduction arrangements was issued under the same Code Section that is referenced in Code Section 274 to define the disallowed deduction.

The good news is that with this type of salary reduction plan, under current guidance, even if the employer’s income tax deduction is lost, the employees should still avoid income tax and amounts paid through the plan for parking are not subject to FICA and FUTA

taxes. These plans are subject to monthly dollar limits and other restrictions, so be sure the plan is compliant with the regulations under Code Section 132. And, be aware, the IRS recently confirmed that this type of plan will *not* create parking deduction after tax reform. See, IRS Publication 15b - “*Employer’s Tax Guide to Fringe Benefits*” for use in 2018.

3. **Renegotiate the lease/move to new space.** Absent additional guidance, for-profit employers who own their own buildings or who lease space that offers free parking should not be affected by the loss of a deduction under Code Section 274. Employers who currently pay for parking may be able to renegotiate their lease and as a part of that renegotiation get “free parking.” For this approach, the facts should show that the renegotiation involved more than just reallocating the cost of parking – the renegotiation should involve other changes. For tax-exempt employers, guidance is needed - the Service was expressly given regulatory authority with respect to the allocation of depreciation and costs for “parking facilities” under the new Section 512(a) rules.

Employers will want to explore their options carefully and tax-exempt employers, in particular, may need to budget for both a new tax and the costs of filing an additional tax return. 🍊

⁴ See also Rev. Rul. 2004-98, 2004-42 I.R.B. 664 (10/18/2004)(in a payroll deduction arrangement where parking is paid for with pre-tax salary reduction amounts, it is the employer who is paying for the parking).



ALA Regional Legal Management Conferences

West Regions 4, 5, 6

October 18-20, 2018

Hilton Austin

Austin, TX

East Regions 1, 2, 3

September 13-15, 2018

Palmer House Hilton

Chicago, IL

Registration Now Open!

ALA's Regional Legal Management Conferences provide identical education in two locations, and include networking opportunities and round tables based on region. The high-caliber educational content is geared toward the needs of legal management leaders and functional specialists.

These conferences feature:

- Insight on hot topics in today's legal industry
- Intensive networking opportunities
- Experts on profitability, innovation, strategy, leadership, technology and more
- The latest in legal management products, market intelligence, services and technology
- Continuing education credits

Questions?

- Inquiries regarding course offerings should be directed to profdev@alanet.org.
- Registration and/or hotel queries should be directed to registration@alanet.org.
- Sponsorship opportunities are available. Inquiries should be directed to advertising@alanet.org.



Orange County ALA

Out & About

ACES 2018



ACES 2018



Orange County ALA

Out & About

Law Firm Leaders Forum

March 6, 2018



Orange County ALA
Out & About
Member's
Dinner 2018





Welcome New Business Partners

A warm Orange County welcome our
newest Business Partners!



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JHill Staffing Services is now a Division of Marcum Search LLC

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Dana Labow Trevers
has been promoted to:
Director of Practice Management
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Congratulations Dana!



NEW MEMBER WELCOME

OC-ALA is proud to welcome and acknowledge its newest members.



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Happy Anniversary - 2nd Quarter 2018

March

Diane Perkison	31 years
Jane Deak	24 years
Lynda Taylor	19 years
Loretta Vince	15 years
Kathie Jones, CLM	14 years
Karla Ybarra	7 years
Matthew Sullivan	2 years
Vicki Myers	1 year

April

Joyce Kelly	19 years
Sue Bradford	17 years
Jane Portillo	10 years
Annette Summers	2 years

May

Carolyn Smallwood	27 years
Fiona Oboussier	13 years
Debbie Fenoglio	5 years
Emily Beckford	3 years
Cindy Brown	3 years
Olga Lee, SPHR-SCP	3 years
Rachel Brown	1 year
Toni Conway	1 year
Nancy Dillon	1 year
Alma Secret Marquez	1 year
Kaylene Spangler	1 year



CALENDAR

www.OrangeCountyALA.org

May 10, 2018

Board Meeting

Wesierski & Zurek, LLP



June 6, 2018

Finance & Technology Section Meeting

Newmeyer & Dillion, LLP

June 12, 2018

Project SELF

Students First Day at Firms

June 14, 2018

Board Meeting

Wesierski & Zurek, LLP

June 18, 2018

Past Presidents/Charter Members Council Meeting

Location TBD

June 21, 2018

~ Save the Date ~

Networking Event

Location TBA

[Click here for additional upcoming events and to register through the website.](#)