Entrepreneurship Clinic Research Training

Liz Parker
Reference Librarian
eparker-10@sandiego.edu
Library Services and Resources for the USD Legal Clinics

Librarians are here to help!

This guide is a collection of the library resources students may find helpful when doing remote work for the USD Legal Clinics. Click the side tabs for clinic-specific resources.

Librarians are available to assist with your clinic legal research via chat, email, or Zoom. M-Th 9am-6pm, Fri 9am-5pm, and Sun 12pm-4pm.

To reach us via chat, click the chat widget on the lower right corner of this screen. To send us a question over email, or to schedule a Zoom research consultation, please email the LRC Reference Department at lrcrefer@sandiego.edu.

Quick Links for Clinic Research

- Request librarian research assistance
- LRC Digital Resources (A-Z list of digital resources available from the USD Legal Research Center)
- CEB OnLaw Pro (California practice guides, forms, and legal news)
- San Diego Superior Court (General court information, court rules, and Register of Actions)

Will I be doing the same type of research for the clinic as I did for my Legal Writing & Research class?

Not exactly.

In addition to the resources for searching case law and statutes that you have already mastered, you will be using general and specialized practice materials.
Legal issues for businesses

- Create business plan
- Find and register business name
- Structure business entity
- Site selection, zoning, permits & licenses
- Taxation
- Employment
- Intellectual property
Resources

❖ Government websites – state, county & city
❖ Other local resources
❖ Treatises and practice guides
❖ Databases with useful business-related resources
   ❖ Cooley GO
   ❖ CEB Pro
   ❖ Bloomberg Law
   ❖ Practical Law (Westlaw)
Government Websites
State of Delaware

Division of Corporations
https://corp.delaware.gov/
The Division of Corporations will no longer accept fax submissions after December 31, 2019. Please use our "New" Document Upload Service.
Annual Report and Tax Instructions

Click Here to Pay Taxes / File Annual Report

FILE YOUR ANNUAL REPORT AND PAY BUSINESS ENTITY TAX

This application is available daily between 8:00 am and 11:45 pm Eastern Time. Only use the English version of characters when entering data, otherwise it may cause an inaccurate record on your Annual Report.

Payment Information

If payment is by credit card click submit only once, clicking multiple times may result in duplication of charges to your credit card.

Electronic Payment (ACH Debit)
Required for all transactions over $5,000.00.

Bank Identification Number 2516000279

- Checking Account

Credit Card

https://corp.delaware.gov/paytaxes/
Corporate Annual Report Information and Franchise Tax Fees

Corporate Annual Report
All active Domestic Corporation Annual Reports and Franchise Taxes for the prior year are due annually on or before March 1st and are required to be filed online. Failure to file the report and pay the required franchise taxes will result in a penalty of $200.00 plus 1.5% interest per month on tax and penalty.

Annual Report Filing Fees:

- Exempt Domestic Corporations – $25.00.
- Non-Exempt Domestic Corporations – $50.00.

Franchise Tax Rates:
The minimum tax is currently $175.00, using the Authorized Shares Method and the Minimum Tax using the Assumed Par Value Capital Method is $400.00 with a maximum tax of $200,000.00 for both methods unless it has been identified as a Large Corporate Filer then their tax will be $250,000.00. Taxes are assessed if the corporation is active in the records of the Division of Corporations anytime during January 1st through December 31st of the current tax year.

Methods of Calculating Franchise Tax

Foreign Corporations

Foreign Corporations must file an Annual Report with the Delaware Secretary of State on or before June 30 each year. A $125.00 filing fee is required to be paid. If the Annual Report and remittance is not received by the due date, a $125.00 penalty will be added to filing fee.

LLC/Partnership Tax Information

All Domestic and Foreign Limited Liability Companies, Limited Partnerships, and General Partnerships formed or registered in Delaware are required to pay an annual tax of $300.00. There is no requirement to file an Annual Report.

The annual taxes for the prior year are due on or before June 1st. Failure to pay the required annual taxes will result in a penalty of $200.00 plus 1.5%
How to Calculate Franchise Taxes

Effective January 1, 2018, a domestic stock or non-stock for profit corporation incorporated in the State of Delaware is required to pay annual franchise tax. The minimum tax is $175.00, for corporations using the Authorized Shares method and a minimum tax of $400.00 for corporations using the Assumed Par Value Capital Method. All corporations using either method will have a maximum tax of $200,000.00. Corporations owing $5,000.00 or more make estimated payments with 40% due June 1st, 20% due by September 1st, 20% due by December 1st, and the remainder due March 1st.

The Annual Franchise Tax assessment is based on the authorized shares. Use the method that results in the lesser tax. The total tax will never be less than $175.00, or more than $200,000.00.

Non-Stock for Profit

All non-stock, for profit entities that do not comply with the Exempt Corporation requirements will be required to pay a Franchise Tax of $175.00.

Authorized Shares Method

For corporations having no par value stock the authorized shares method will always result in the lesser tax.

- 5,000 shares or less (minimum tax) $175.00.
- 5,001 – 10,000 shares – $250.00.
- Each additional 10,000 shares or portion thereof add $85.00
- Maximum annual tax is $200,000.00

For Example

A corporation with 10,005 shares authorized pays $335.00($250.00 plus $85.00).
Assumed Par Value Capital Method

To use this method, you must give figures provided in your Annual Franchise Tax Schedule L (Federal Return) relative to the method is $400.00 per million or portion thereof of the assumed par value capital.

The example cited below is for a company with 1,000,000 shares of stock with a par value of $5.00 per share.

1. Divide your total gross assets by $400.00.
   Example: $1,000,000,000 assets, 485,000 shares = $1,000,000,000 / 485,000 = $2,061,856

2. Multiply the assumed par by the number of authorized shares.
   Example: $5.00 par value = $1,250,000

3. Multiply the number of authorized shares by the assumed par.
   Example: 2,061,856 shares $5.00 par value = $2,061,856

4. Add the results of #2 and #3 above.
   Example: $2,061,856 + $2,061,856 = $4,123,712

5. Figure your tax by dividing the assumed par value capital by $400.00.
   Example: $4,123,712 / $400.00 = $1,030,928

6. The minimum tax for the Assumed Par Value Capital Method is $400.00 per $1,000,000 or portion thereof of assumed par value capital.

   **NOTE:** If an amendment changing your stock is effective after the date of this tax year, the tax year must be prorated for each portion of the year. The tax calculated for that portion of the year must be prorated.

   You may also use our Franchise Tax Calculator at [https://corp.delaware.gov/frtaxcalc/](https://corp.delaware.gov/frtaxcalc/)

Large Corporate Filer Information

Enter total number of authorized shares:

TAX:

Enter total gross assets:
Enter total issued shares:

Your assumed par value is:

Enter each class of authorized shares and their par value:

<table>
<thead>
<tr>
<th>CLASS</th>
<th>NUMBER OF AUTHORIZED SHARES</th>
<th>PAR VALUE</th>
<th>ASSUMED PAR VALUE CAPITAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>ON PAR VALUE STOCK</td>
</tr>
<tr>
<td>Class 1</td>
<td></td>
<td></td>
<td>ON NO PAR VALUE STOCK</td>
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<tr>
<td>Class 2</td>
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<td></td>
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<tr>
<td>Class 3</td>
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<td>Class 4</td>
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<td>Class 5</td>
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<td>Class 6</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Class 7</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total assumed par value capital:

TAX BY PAR VALUE:

If tax on assumed par method is greater then $200,000.00, then only $200,000 is due.

Total tax:
State of California

- CA Secretary of State Business Programs
  - Starting a Business
  - Tax Information
- Governor’s Office of Business and Economic Development
  - Form a Business
  - Small Business Program
  - CalGold – identifies necessary permits
Business Programs

Hot Topics

1. LLC Statements of Information File Online
2. Corporation Statements of Information File Online
3. Register or Terminate a Business
4. Corporate Filing Tips
5. Limited Liability Company Filing Tips
6. Forms, Samples and Fees for Business Entities
7. Business Search with Free Images
8. Business Entities Records Order Form (PDF)
9. Current Processing Dates for Business Filings
10. Delinquency and Penalty Notices
11. Suspension/Forfeiture Notices
12. FTB Administrative Dissolution/Surrender Notice

Business Entities

The Secretary of State's office processes filings, maintains records and provides information to the public relating to business entities that include corporations, limited liability companies, limited partnerships, general partnerships, limited liability partnerships and other business filings.

Uniform Commercial Code

The Secretary of State's office is the initial filing office for certain Uniform Commercial Code financing statements and other lien documents including notices of judgment liens, attachment liens and federal and state liens. Filing with our office serves as security interest in named collateral and

 Trademarks and Service Marks

The Secretary of State's office maintains registration and all updates of California state trademarks and service marks. Contains brands, licensed marks and the

More about Trademarks and Service Marks
Business Entities

News & Notices, Customer Alerts and Processing Times

- **News & Notices**: Get the latest information about changes affecting business conducted with the Business Programs Division.
- **Customer Alerts**: Get the latest information about confirmed scams against Californians and businesses in the State of California, and what you can do if you have been a victim of a scam.
- Get the current [processing times for Business Entities](http://www.sos.ca.gov/business-programs/business-entities/) and determine which method of submission meets your needs.

Online Services

All LLC Statements of Information and the required Statement of Information for most corporations can be [submitted electronically](http://www.sos.ca.gov/business-programs/business-entities/) using a credit card. PDF copies of imaged business entity documents, including Statements of Information are available for free on the Secretary of State's [Business Search](http://www.sos.ca.gov/business-programs/business-entities/).

**Note**: Statements of information for common interest developments must be submitted on paper, by mail or in person (drop off), at this time.

The Business Entities Section of the Secretary of State’s office processes filings, maintains records and provides information to the public relating to business entities (corporations, limited liability companies, limited partnerships, general partnerships, limited liability partnerships and other business filings).

- **Service Options**: Options for online searches and filings, document processing and information requests (for certificates, copies and status reports)
- **Name Reservations**: Corporation, limited liability company and limited partnership name reservations
- **Forms, Samples & Fees**: Forms, document samples and associated fees
- **Statements of Information** (annual/biennial reports): Corporation and limited liability company statements of information, common interest development association statements and publicly traded disclosure statements
- **Filing Tips**: Tips for filing most corporation, limited liability company and limited partnership documents
- **Information Requests**: Orders for certificates, copies and status reports
- **Service of Process**: Substituted service of process
- **FAQs**: Answers to the most frequently asked business entity questions
- **Victims of Corporate Fraud Compensation Fund**: Restitution to victims of corporate fraud

http://www.sos.ca.gov/business-programs/business-entities/
Forms, Samples and Fees

Select the applicable entity type from the list below. Fees for all business entity filings and services can also be found on the Business Entities Fee Schedule (PDF).

| 1. Corporations – California (Domestic) |
| 2. Corporations – Foreign (Out-of-State or Out-of-Country) |
| 3. Corporations – Statement of Information |
| 4. Limited Liability Companies – California (Domestic) |
| 5. Limited Liability Companies – Foreign (Out-of-State or Out-of-Country) |
| 7. Limited Partnership – California (Domestic) |
| 8. Limited Partnership – Foreign (Out-of-State or Out-of-Country) |
| 9. General Partnership |
| 10. Limited Liability Partnership |
| 11. Other Business Filings |
| 12. Business Records |

Reminder: All Filings and Contents are Available to the Public

Filings and information contained in filings you submit to the Secretary of State are public record, including names, phone numbers, email addresses, and mailing and street addresses, except as provided in statutes. To avoid issues related to identity theft you should avoid using and submitting confidential information in public filings unless specifically required by statute. The public can view information and download documents contained in the Secretary of State’s electronic records using digital search tools and information posted on the Secretary of State’s website. Also, please note that individuals and private companies use this public information to create third party access to these records.

For more information about privacy, please consult our FAQs Personal Information in Public Filings. More information on accessing public records is available through the Secretary of State’s Guidelines for Access to Public Records.

Electronic Signatures

"Electronic signature" typically is defined as meaning an electronic sound, symbol, or process attached to or logically associated with an electronic record and executed or adopted by a person with the intent to sign the electronic record. An electronic signature may be as simple as typing in a name electronically, checking a box indicating an intent to sign or some similar process. However, electronic signatures only are permissible in electronic transactions between consenting parties. The use of an electronic signature requires the
# Forms, Samples and Fees

Select the applicable entity type from the list below. Fees for all business entity filings and services can also be found on the [Business Entities Fee Schedule](#) (PDF).

## 1. Corporations – California (Domestic)

<table>
<thead>
<tr>
<th>California Corporations</th>
<th>Online Submissions</th>
<th>Fillable PDF</th>
<th>Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Filing Tips)</td>
<td>File Online for faster response</td>
<td>Print and submit via mail or in person</td>
<td>^ if Filing outside of required filing period, no filing fee required.</td>
</tr>
</tbody>
</table>

1. Articles of Incorporation - General Stock | -- | Form ARTS-GS | $100.00 |
2. Articles of Incorporation - Close | -- | Form ARTS-CL | $100.00 |
3. Articles of Incorporation - Professional | -- | Form ARTS-PC | $100.00 |
4. Articles of Incorporation - Nonprofit Mutual Benefit | -- | Form ARTS-MU | $30.00 |
5. Articles of Incorporation - Nonprofit Public Benefit | -- | Form ARTS-PB-501(c)(3) | $30.00 |
6. Articles of Incorporation - Nonprofit Religious | -- | Form ARTS-RE | $30.00 |
7. Articles of Incorporation - Common Interest Development | -- | Form ARTS-CID | $30.00 |
8. Certificate of Amendment - Stock | -- | -- | $30.00 |
9. Certificate of Amendment - Nonprofit | -- | -- | $30.00 |
10. Certificate of Amendment - Corporate Name Change Only – Stock | -- | Form AMDT-STK-NA | $30.00 |
11. Certificate of Amendment - Corporate Name Change Only – Nonprofit | -- | Form AMDT-NP-NA | $30.00 |
12. Restated Articles of Incorporation - Stock | -- | -- | $30.00 |
13. Restated Articles of Incorporation - Nonprofit | -- | -- | $30.00 |
Business Search

This search provides access to available information for corporations, limited liability companies and limited partnerships of record with the California Secretary of State, including free PDF copies of imaged business entity documents, including the most recent imaged Statements of Information filed for corporations and limited liability companies. Please note: This search is not intended to serve as a name availability search. For information on checking or reserving a name, refer to Name Availability.

To conduct a search:

- Select the applicable search type.
- In the "Search Criteria" box, enter the entity name or number you wish to search. Note: If entering the entity number of a corporation, the number must begin with the letter C.
- Select the search filter you wish to use to locate the entity if searching for an entity name.
- Select the Search button.
- For help with searching an entity name or number, refer to Search Tips.

ALERT: If you filed an online limited liability company (LLC) statement of information over the weekend of December 8-11, please confirm your LLC’s statement of information is of record on the California Business Search. If you do not see your current statement of information on the California Business Search, please contact our SI Support Center at (916) 695-1338 for assistance.

All fields marked with an asterisk (*) are required.

Search Type *
- Corporation Name
- LP/LLC Name
- Entity Number

Search Criteria *

Search

Disclaimer: This tool allows you to search the Secretary of State's California Business Search database for abstracts of information for domestic stock, domestic nonprofit and qualified foreign corporations, limited liability companies and limited partnerships that have filed with this office. This search tool groups corporations separately from limited liability companies and limited partnerships and returns all entities for the search criteria in the respective groups regardless of the current status.

Although every attempt has been made to ensure that the information contained in the database is accurate, the Secretary of State's office is not responsible for any loss, consequence, or damage resulting directly or indirectly from reliance on the accuracy, reliability, or timeliness of the information that is provided. All such information is provided "as is." For information on ordering copies of the official business entity records for a particular entity, please refer to Information Requests.
Starting a Business Checklist

STARTING A BUSINESS CHECKLIST:

1. Prepare and Plan (do market research and create an outline of your business)
2. Secure Financing (if necessary)
3. Choose an Entity Type (e.g. LLC, Corporation, LP, LLP, GP, or Sole Proprietorship) and Business Name
4. Register Your Business with the Secretary of State (LLC, Corporation, LP, LLP or GP)
5. Register a Fictitious Business Name (if necessary)
6. Choose a location and check local zoning regulations
7. Obtain specialty licenses and permits (if necessary)
8. Employer Responsibilities (if necessary: EIN Number, workers' compensation, etc.)
9. Tax Information (FTB, BOE, EDD, IRS)
10. Ongoing Secretary of State Filing Requirements (Statements of Information)

Thank you for your interest in registering a business with the California Secretary of State's office and processing millions of filings and records requests each year.

There are several key steps to launching a business in the state of California. These steps will depend on the business will be located. Therefore, be sure to check specific rules and regulations within the state. The "Starting a New Business Checklist" assess how to start a business in California, not as a direct step-by-step guideline. In order to register your business, you must provide to state, local, and federal agencies.

Click the image to download the Starting A New Business Brochure PDF

This website assists you in finding appropriate permit information for your business. It also provides contact information for the various agencies that administer & issue these permits.

Select a City or County

- San Diego - San Diego County

Enter Business Type(s)

- Computer Systems Design and Related Services

Interested in having a green business? [Learn more about green businesses]

Search
City of San Diego

- Doing Business
- Economic Development
  - Start, Expand & Finance Your Business
  - Tax Incentives
  - Business Start-up Resources
  - Industry Associations
- Office of the City Treasurer
There are several key steps to starting a business in the City of San Diego. The steps may vary depending on the type of business you intend to launch. Following the 10 Key Steps to Starting a Business will give you a general idea and help the process run smoothly.

Many steps can be researched and processed online through the websites listed, saving you the time of calling or visiting department or agency offices. The City’s Central Library and all branches provide Internet access during library hours.

1. Research what it takes to start a business. (A City of San Diego Public Library is has resources, too.)
2. Find out where you can locate your business, what permits you might need and how much they’ll cost—all through OpenCounter Online Business Portal. The City’s Development Services Department can also assist. If you plan to operate out of your home, obtain information about requirements for home occupations by contacting Code Enforcement.
3. Determine a Business Name and register at County of San Diego, Assessor/Recorder/County Clerk’s Office.
5. Determine the Business Activity Type from the list provided by the Office of City Treasurer’s Business Tax Certification application.
6. Determine the Legal Structure of the business.
7. Obtain any special licenses and permits. (Read more about this in the complete version of 10 Key Steps.)
8. Get tax information from the California Tax Information Center (link is external), and the Internal Revenue Service.
9. Learn about Employer Responsibilities at the City level (Earned Sick Leave and Minimum Wage Ordinance) from the Office of the City Treasurer. Learn about Employer Responsibilities at the State and Federal levels from the Employment Development Department and Internal Revenue Service.
10. Apply for a Business Tax Certificate (Business License) from the Office of the City Treasurer, Business Tax Division.

For those business startups that do not have access to the Internet, the City’s Central Library and all branch libraries provide access to the Internet during hours the library is open.

Download a complete version of the 10 Key Steps to Starting a Business, which includes contact information for each step.
Incentives and programs are available to help launch, grow and expand your business, and provide support for homeowners and contractors to get work done.

Get It Done

1. I Need To...

   - Apply for

2. Apply...

   - Business License

3. Apply Now

   - Apply for a business tax certificate

Download the Get It Done App

Plan

Start a Business
Find regulations and documents needed to build your company in the City of San Diego

Bid on a Contract
Become a vendor for the City and bid on current or future projects

Explore Incentives
https://www.sandiego.gov/doing-business
Office of the City Treasurer

Gail R. Granewich
City Treasurer

1200 Third Ave., Suite 100
San Diego, CA 92101
619-236-6112
Fax: 619-236-7134

In observance of Labor Day, our office will be closed September 4, 2017

Features

Minimum Wage Program
Short-Term Vacation Rentals
Efficiently Managing Public Funds

https://www.sandiego.gov/treasurer
Online Payments

- Business Tax Online
- Rental Tax Online
- Parking Citation Online (Pay Cite)
  - View Pay Cite Frequently Asked Questions
- TOT/TMD Fees Online
- Delinquent Account Online
- Water & Sewer Bill Online (Customer Care Center)

NOTE: In addition to online payments, other payment methods are available. Past due accounts that have been referred to the Office of the City Treasurer for collection can only be paid through the Delinquent Accounts Program.

City Taxes and Fees

- Business Tax/Rental Unit Business Tax
- Transient Occupancy Tax (TOT)/Tourism Marketing District (TMD)

Other Agency Taxes

These other agency taxes are NOT administered by the City of San Diego.

- Sales and Use Tax
- Property Taxes
- Income and Payroll Taxes
- Federal Taxes
Business Relief and Support

Economic Assistance for San Diego Businesses Affected by COVID-19
San Diego County business resources
- Business Licenses & Permits
- Fictitious Business Names
- Tax Information
FICTITIOUS BUSINESS NAMES

- WHAT IS IT?
- WHEN IS IT REQUIRED?
- FILE IN PERSON
- FILE BY MAIL
- SEARCH ONLINE
- SEARCH IN PERSON
- SEARCH BY MAIL
- ONLINE FORMS
- ORDERING COPIES OF A FILED FBN

WHAT IS IT?

This section will tell you how a Fictitious Business Name is defined, as well as who should file a Fictitious Business Name Statement.

The Definition of Fictitious Business Name is:

A business name that DOES NOT include the surname of the individual owner; AND EACH of the partners or the nature of the business is not clearly evident by the name.

For example:

Doing business under a name like:

- Eisenberg & Yandall Associates
- Eisenberg & Yandall Sons

would require a Fictitious Business Name be registered, even though the surname of the owner is stated, the words following the surname suggest other owners that are not specifically named.

HOWEVER, doing business under a name like:

- Teresa Piske Plumbing
Municipal and County Codes

❖ San Diego Municipal Code
❖ San Diego County Code
❖ Municode: other California cities
❖ American Legal Publishing – a few other California counties
Corporations

California

❖ Marsh’s California Corporation Law | WL
❖ California Practice Guide Corporations | WL
❖ California Corporation Laws | Lexis
❖ Advising California Nonprofit Corporations | CEB
❖ Selecting and Forming Business Entities | CEB
❖ Forming & Operating California Limited Liability Companies | CEB
Corporations

Delaware

❖ The Delaware Corporation: Legal Aspects of Organization and Operation | Bloomberg

❖ Balotti and Finkelstein’s Delaware Law of Corporations and Business Organizations | WL

❖ The Delaware Law of Corporations & Business Organizations | Lexis

❖ Delaware Corporations Form Finder | WL
Databases
Databases

- Cooley GO – free, open access
- CEB Pro – requires individual login; register at https://calaw.ceb.com/free-student-access.html
- Bloomberg Law – requires individual login; register at bloomberglaw.com
- Practical Law Connect – available through Westlaw
Cooley GO

- Focused on serving entrepreneurs
- Generate core legal documents, including a full incorporation package, convertible note term sheet, privacy policy, terms of use and more
- Find timely, focused articles on current legal trends, with a straight-forward “what you need to know” tone.
INDEX OF COOLEY GO DOCS DOCUMENT GENERATORS

**Start Your Company**
- Incorporation Package (Delaware)

**Forms for Running Your Business**
- Advisor Agreement
- Consulting Agreement
- Employee Confidential Information and Assignment Agreement
- Employee Offer Letter
- Non-Disclosure Agreement (One-way)
- Non-Disclosure Agreement (Mutual)

**Protect Your Website**
- Website Terms of Use
- Privacy Policy

**Finance and Grow**
- Convertible Note Term Sheet
- Series Seed Convertible Note Financing Package
- Series Seed Equity Financing Package
- 500 Startups KISS (“Keep It Simple Security”)
- Y Combinator SAFE (“Simple Agreement for Future Equity”)

**Related Articles**
- Important GDPR Resources
  - Create and Protect
- Q1 2018 Quarterly VC Update: Matthew Howard on the State of Venture Capital Investing
  - Raise
- Q4 2017 Quarterly VC Update: Michael Ronen on the State of Venture Capital Investing
  - Raise

CEB Pro

- Online platform for CEB’s popular California-specific practice guides
- Set up your academic account using USD’s law school code at www.ceb.com/aba
- CEB publishes several titles useful for California businesses
Know Your Audience
Katherine Gallo  August 24, 2020
Recently at an MCLE seminar, a sitting judge forewarned the audience that judges come from a variety of legal backgrounds, and often they don’t have the necessary background on law and procedures for their department. His advice: “Come to your hearings with copies of all the important cases and statutes.”

Correcting a Mistake in a Trust Transfer Deed
Bruce A. Last  August 24, 2020
As estate and trust practitioners, we’re used to dealing with procedures and rules. Between the Tax Code, the Probate Code, Rules of Court, and local court rules, one might believe that when it comes to estate planning and administration, there’s a specified rule for everything. Perhaps this is why...

research.ceb.com
Selected Developments

April 2019 Update

The California Supreme Court approved a new set of Rules of Professional Conduct, effective as of November 1, 2018. Explanations of and citations to rules throughout this book have been revised and corrected as appropriate. See §91.2–1.6, 1.9A, 1.16–1.19, 1.40, 3.14, 9.11, 10.7, 10.9, 10.25, 11.227.

The California Supreme Court held that a law firm's failure to disclose a known, existing conflict violated the Rules of Professional Conduct, even though the client agreed to a blanket waiver, and that therefore an arbitration decision awarding the firm unpaid contractual fees had to be vacated. Sheppard, Mullin, Richtor & Hampton, LLP v J-M Mfg. Co. (2018) 6 C5th 59. See §1.4.

The California Legislature has extended the authority for architects, engineers, and surveyors to form professional LLPs until January 1, 2026, and the authority for lawyers and accountants to form professional LLPs indefinitely.
Bloomberg Law

- Delaware corporate law resources
- Sample forms and employment agreements
- Treatises & practice guides on tax, corporate, employment, IP
- Practice materials and tips for law students
REGISTER FOR A BLOOMBERG LAW ACCOUNT

Not a law school user? Please click here.

ACTIVATION CODE: Leave blank

What's this?

An activation code is not required. If you do not have an activation code, skip this section.

* Items marked with a red asterisk are required

First name:*

Last name:*

Phone number (e.g. 212 555 1212)*

Law school email address:*

Please re-type email address:*

What law school do you work for or attend? *

Which of the following best describes your current role? *

Keep me informed of new Bloomberg BNA offers and promotions via email and other means.

Read the terms and conditions here.

I agree with the terms and conditions *

Submit  Cancel
Live online training every Tuesday and Thursday.
Available through Westlaw

Legal know-how for transactional matters

Practice area overviews, including finance, corporate, employment, IP, real estate and tax

Model documents with drafting and practice tips
Resources

Slides for this training:
https://www.sandiego.edu/law/library/research-trainings/clinics.php
Questions?

❖ Liz Parker
eparker-10@sandiego.edu
619.260.4600 x2555

❖ LRC Reference
lrcrefer@sandiego.edu
619.260.4612
www.sandiego.edu/law/library/