



Lawyer Referral and Information Service

2300 Clayton Road Suite 520 ♦ Concord, CA 94520 ♦ (925) 686-6900

MODERATE MEANS ELDER LAW PANEL

Attorney: _____

Year of admission to California Bar: _____

Number of years of continuous active practice in California: _____

Disciplined by State Bar: Yes No (If Yes, please explain in separate attachment)

Substantial Equivalent Experience

If you cannot meet the following requirements for Panel membership, but believe that you qualify by reason of substantial, equivalent experience, you may submit an outline of such experience, as provided for in Rule 6(D) of the Lawyer Referral and Information Service Rules.

EXPERIENCE QUALIFICATIONS

PART A - ELDER LAW

Class 1 – Elder / Financial Abuse

Applicant must have **a)** handled ANY two cases (civil or criminal) through a jury trial within the last seven years, **b)** UNLESS at least one of the jury trials listed was a personal injury matter, handled *two* personal injury or probate litigation matters filed within the last five years through discovery, **c)** handled two conservatorship matters within the last five years, and **d)** handled a substantial matter in at least two of the following subject areas:

- Public Benefits for the Elderly
- Fiduciary Litigation
- Nursing Home Litigation
- Matters involving criminal and/or civil statutes relating to elder financial abuse (i.e., the Elder Abuse Act)

Two cases through jury trial:

1. Case Name: _____

Trial Date and Judge: _____

County/Case #/Court: _____

Nature of case: _____

Judgment or other resolution: _____

Counsel for: _____

Personal Injury matter? YES NO

Part D – Elder Law, continued

2. Case Name: _____
Trial Date and Judge: _____
County/Case #/Court: _____
Nature of case: _____

Judgment or other resolution: _____
Counsel for: _____
Personal Injury matter? YES NO

Two personal injury or probate litigation matters through discovery:

(Required only if neither jury trial involved a personal injury matter)

1. Case Name: _____
Date Filed: _____
County/Case #/Court: _____
Plaintiff’s Demand: _____
Defendant’s Offer: _____
Nature of case: _____

Judgment or other resolution: _____
Counsel for: _____

2. Case Name: _____
Date Filed: _____
County/Case #/Court: _____
Plaintiff’s Demand: _____
Defendant’s Offer: _____
Nature of case: _____

Judgment or other resolution: _____
Counsel for: _____

Two conservatorship matters:

Inclusive dates of representation:

1. _____
2. _____

Description of substantial matter handled in two of the following areas:

Fiduciary Litigation _____

Nursing Home Litigation _____

Matters involving criminal and/or civil statutes relating to elder financial abuse _____

Class 2 – Long-Term Care Planning / Medi-Cal

Applicant must have handled two matters involving this issue within the past two years:

Description:	Inclusive dates of representation:
1. _____	_____
2. _____	_____

Class 3 – Social Security

Applicant must have handled two matters involving this issue within the past two years:

Description:	Inclusive dates of representation:
1. _____	_____
2. _____	_____

**Part B
ALTERNATE QUALIFICATIONS:**

A participating attorney who does not meet the Minimum Qualifications for the Moderate Means Panel may alternatively qualify to receive referrals after having submitted to the Lawyer Referral and Information Service Committee the following statements of completion of the following procedures:

- I meet Sections A & B of the following Alternate Qualifications for the Moderate Means Panel.
 - A. I certify that I am familiar with State laws and Court rules relating to elder law and elder financial abuse; or
 - B. Have completed the necessary On-Demand Courses offered through the Practising Law Institute, as follows:
 - Representing the Pro Bono Client – Consumer Basics 2019
 - <http://bit.ly/32XPXkK>
 - Effective Communication with the Legal Services Client 2019
 - <http://bit.ly/330OpGD>
 - Ethical Issues in California Pro Bono Representation 2019
 - <https://bit.ly/3aVJxFw>

***PLI Institute may be able to help with the cost of these trainings through their scholarship program**

- <http://bit.ly/2K5hVDJ>

I am not a Certified Specialist (Area I) and/or do not qualify for the Minimum Qualifications (Area II), and do not meet the Alternate Qualifications above, but agree to the following condition:

A. I agree, until completion of the qualifications above, that I shall obtain a mentor who has at least five (5) years experience, and has a current policy of errors and omissions in the minimum amount of \$100,000.00 single occurrence and \$300,000.00 aggregate per year (proof of insurance must also be provided).

Name of Mentor:

Address/Firm:

State Bar #/Year of Admission:

I submit this Statement of Qualifications, as evidence of my eligibility to participate in the Moderate Means Panel of the Contra Costa County Bar Association's Lawyer Referral and Information Service (LRIS). I understand that the information contained herein is subject to reasonable verification and I agree to cooperate with the LRIS Committee and its designees in the process of evaluating my qualification. I declare, under penalty of perjury, that the foregoing is true and correct.

I agree that I will indemnify, defend and hold harmless the Panel and/or the Contra Costa County Bar Association from any adverse claim, award, judgment, or settlement occurring as a result of my advice to or my representation of a client referred by the Panel.

Signature of Applicant _____ Date _____

Signature of Mentor (if applicable) _____ Date _____