



Lawyer Referral and Information Service
2300 Clayton Road, Suite 520, Concord, CA 94520
(925) 686-6900

PROBATE, ESTATE PLANNING & TRUST 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.

[] I would like to receive referrals in the following categories:

Part A: [] Class 1 [] Class 2 [] Part B [] Part C

Part D: [] Class 1 [] Class 2 [] Class 3

EXPERIENCE QUALIFICATIONS

PART A – PROBATE / ADMINISTRATION, CONSERVATORSHIPS

Applicant must have handled two matters within the selected class within the past five years. For EACH matter indicate either COURT: File #, Date of Original Filing, Inclusive Dates of Representation or OFFICE: File Identification, Inclusive Dates of Representation.

Class 1 – Probate / Administration

- 1. _____
2. _____

Class 2 - Conservatorships

- 1. _____
2. _____

PART B - ESTATE PLANNING, WILLS & TRUSTS

Within the last five years, applicant must have handled five estate planning matters involving trusts, and must have drafted two wills. For **EACH** matter, indicate *either* COURT: File #, Date of Original Filing, Inclusive Dates of Representation *or* OFFICE: File Identification, Inclusive Dates of Representation.

Living Trusts:

- 1. Court/Office information: _____
Description of matter: _____
- 2. Court/Office information: _____
Description of matter: _____
- 3. Court/Office information: _____
Description of matter: _____
- 4. Court/Office information: _____
Description of matter: _____
- 5. Court/Office information: _____
Description of matter: _____

Wills:

- 1. Court/Office information: _____
Description of matter: _____
- 2. Court/Office information: _____
Description of matter: _____

PART C - WILLS / TRUSTS CONTESTS

Applicant must have handled through discovery two will contest cases filed within the last five years, **AND** must have handled ANY two cases (civil or criminal) through a trial within the last seven years in Superior Court or U.S. District Court.

Two will contest cases through discovery:

	County	Court	Case #	Date Filed
1.	_____	_____	_____	_____
	County	Court	Case #	Date Filed
2.	_____	_____	_____	_____

Two cases through trial:

- 1. Case Name: _____
Trial Date and Judge: _____

Part C - Wills /Trusts Contests, continued

County/Case #/Court: _____

Nature of case: _____

Judgment or other resolution: _____

Counsel for: _____

Court trial Jury trial

2. Case Name: _____

Trial Date and Judge: _____

County/Case #/Court: _____

Nature of case: _____

Judgment or other resolution: _____

Counsel for: _____

Court trial Jury trial

PART D - 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. _____

I certify under penalty of perjury that the information set forth above is true and correct.

Date: _____ Signature: _____