

CONSERVATORSHIP

Includes all matters relating to conservatorship.

EXPERIENCE REQUIREMENTS: Applicant must be able to declare and provide a copy of their specialist certificate as set forth in paragraph one or alternatively must meet the experience requirements set forth in paragraph two below.

1. I am certified by the California Board of Legal Specialization as a specialist in the field of Probate Estate Planning and Trust Law. Attached is a copy of my certificate. This qualifies me for membership on the panel without the necessity of completing the remainder of this form.

OR

2. I have competently performed to completion substantially all legal work, including the preparation and representation of a conservator in at least five private conservatorship administrations, with at least one being of the estate and going through the completion and court approval of the first accounting, and one involving a limited conservatorship. Identification of such matters are as follows:

- (a) Estate - Through First Accounting
- (b) Limited Conservatorship
- (c) General Conservatorship

Cases

Case Name Description of Work Performed Date of First Accounting Type of Case

(A)

(B)

(C)

(D)

(E)

EDUCATION REQUIREMENTS: In addition to the requirements above, **an applicant practicing law for less than three years must certify that he or she has completed not less than four hours** of State Bar approved MCLE credits in the subject area of the panel for each year of practice. An applicant practicing law for three or more years must certify that he or she has completed not less than six hours of State Bar approved MCLE credits in the subject area of the panel during the three years preceding the application.

RECOMMENDATIONS: The applicant must provide two LRIS “Recommendation of Professional Qualification” forms from licensed lawyers who practice in the same area for which the applicant is applying, or from state or federal judges sitting in California, attesting to the applicant’s qualifications in the area for which he or she is applying. (If the recommender is a practicing lawyer, he or she should be licensed in California unless the practice area involves federal law only.) These form letters must specifically reflect the authors’ knowledge of the applicant’s qualifications and include the authors’ opportunity to observe the applicant’s qualifications in the area for which he or she is applying. If these form letters are from lawyers, those lawyers may not be affiliated with the applicant’s firm, and the applicant may not have any economic interest with them.

I hereby certify under penalty of perjury that I have met the above criteria and requirements, and that I am competent to handle referral matters in the panel subject area described above.

Attorney’s Name: _____

Attorney’s Signature: _____ Date: _____