

## **REAL ESTATE TRANSACTIONS**

Includes all matters related to advice and preparation of sales agreement and other sales, escrow and financing documents, and advice and preparation of leases, options, and related realty transactions including boundary disputes.

**EXPERIENCE REQUIREMENTS:** In paragraph (1) below, the applicant must certify that in the past five years, at least 25% of his or her practice has been devoted to representing persons involved in real estate transactional issues. Further, as documented below, within the past five years, the applicant must have competently performed to completion substantially all legal work, including the preparation or supervising of the preparation of all legal documents, in the real estate transactional matters identified in paragraph (2). At least one real property transaction must have been handled to completion.

### **1. Real Estate Transactional Issues**

In the past five years, at least 25% of my practice has been devoted to representing persons involved in at least three of the following issues:

- Foreclosure matters;
- Construction loan agreements and/or construction contracts;
- Development of a sub-division;
- Any dispute over the priority of a monetary encumbrance, enforcement of equitable servitude, or an alleged nuisance;
- Any land planning/land use work, including applications that you have processed before the planning department of any jurisdiction;
- Environmental impact statements for any proposed development;
- title insurance matters and reviewing title reports;
- Any transactions secured by real property
- Tenancy-in-common agreements;
- HOA and COA matters.

**AND**

### **2. Transactional Documents**

In the past five years, I have competently performed to completion substantially all legal work pertaining to the preparation or negotiation of at least one of each of the following types documents:

a. Escrow Documents

Date of Sale      Property Address      Escrow Co.      Description of Work

b. Lease Related Documents

Date of Lease      Property Address      Party Represented      Description of Work

c. Sale Related Documents

Property Address      Name of Seller      Name of Buyer      Date of Sale      Description of Work

d. Promissory Note Related Documents

Name of Holder      Name of Maker      Amount of Debt      County/Recording Number for DOT

e. Real Property Transaction Handled to Completion

Property Address      Name of Seller      Name of Buyer      Date of Sale

**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: \_\_\_\_\_