

WILLS, TRUSTS, AND ESTATE PLANNING

Includes all matters related to Wills, intervivos gifts, trusts, gifts, estate tax and estate tax planning.

EXPERIENCE REQUIREMENTS: Applicant must be able to provide a copy of his or her specialist certificate as set forth in paragraph one (1) or must meet the experience requirements set forth in paragraphs two (2) through six (6). **Note, the cases in two (2) through six (6) can all be related matters.

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. In the past five years, I have competently performed to completion substantially all legal work, in the preparation and execution of at least five Wills (reciprocal Wills for husband and wife to be counted as one Will). Identification of such matters are as follows:

Cases

<u>Identification of Will</u>	<u>Description of Work Performed</u>	<u>Date</u>
-------------------------------	--------------------------------------	-------------

(a)

(b)

(c)

(d)

(e)

3. And, in the past five years, I have competently performed to completion substantially all legal work in the preparation and execution of at least five inter vivos trusts and counselled the clients regarding the funding thereof. Identification of such matters is as follows:

Cases

<u>Identification of Trust</u>	<u>Description of Work Performed</u>	<u>Date</u>
--------------------------------	--------------------------------------	-------------

(a)

(b)

(c)

(d)

(e)

4. And, in the past five years, I have competently performed to completion substantially all legal work in the preparation and execution of at least three trusts with provisions involving the following areas: Irrevocable Trusts; Life Insurance Trusts; Charitable Remainder/Lead Trusts; Special Needs Trusts; A/B Trusts; or QTIP Trusts.

Cases

<u>Identification of Trust</u>	<u>Description of Trusts Included</u>	<u>Date</u>	<u>Area(s)</u>
--------------------------------	---------------------------------------	-------------	----------------

(a)

(b)

(c)

5. And, in the past five years, I have competently performed to completion substantially all legal work, in at least three trust administrations, at least one of which included a California Probate Code-compliant trust accounting:

Cases

<u>Identification of Trust</u>	<u>Description of Work Performed</u>	<u>Date</u>	<u>Accounting</u>
--------------------------------	--------------------------------------	-------------	-------------------

(a)

(b)

(c)

6. And, in the past five years, I have competently performed to completion substantially all legal work, in the preparation and execution of at least five Advance Health Care Directives and Powers of Attorney. Identification of such matters is as follows:

Cases

<u>Identification of Document</u>	<u>Description of Work Performed</u>	<u>Date</u>
-----------------------------------	--------------------------------------	-------------

(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: _____