



THE BAR ASSOCIATION OF
SAN FRANCISCO

Lawyer Referral and Information Service

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San Francisco, CA 94111
Telephone: (415) 477-2374
Fax: (415) 477-2389
URL: <http://www.sfbar.org>

**APPLICATION FOR
TAXATION LAW PANEL**

Name: _____
State Bar number: _____
Telephone: _____
Fax: _____
E-mail address: _____
Full time SF office address: _____
Mailing address (if different): _____

Number of years of continuous active practice in California: _____

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 of the Lawyer Referral and Information Service Rules.

Experience Qualifications: Applicant may qualify under **A** or **B**, below.

A) In order to be referred matters in the following classes, applicant must be a certified specialist in taxation law, OR have an LL.M. degree in taxation.

- I am a certified specialist in taxation law. Please indicate year certified: _____
- I have an LL.M. degree in taxation. Please indicate the school from which and the year in which you received your degree: _____

If certified specialist or LL.M., please indicate the class(es) for which you want referrals:

- Class 1 (Personal Income Taxation)
- Class 2 (Business Income Taxation)
- Class 3 (Tax Procedures, Audits and Litigation)

-OR-

B) For each class in which the applicant is interested in receiving referrals, applicant must have handled, in the last three years, three matters in the class and have rendered a written opinion in one such matter.

Class 1 - Personal Income Taxation

Identification: If matter is on public record, identify court or agency, give file number and date of original filing. If office matter only, give office file designation and date but omit client's name.

Please list one matter in which written opinion was rendered: _____ Date: _____

1. _____

Please list two other matters handled:

Date:

2. _____

3. _____

Class 2 - Business Income Taxation

Identification: If matter is on public record, identify court or agency, give file number and date of original filing. If office matter only, give office file designation and date but omit client's name.

Please list one matter in which written opinion was rendered:

Date:

1. _____

Please list two other matters handled:

Date:

2. _____

3. _____

Class 3 - Tax Procedures, Audits and Litigation

Identification: If matter is on public record, identify court or agency, give file number and date of original filing. If office matter only, give office file designation and date but omit client's name.

Please list one matter in which written opinion was rendered:

Date:

1. _____

Please list two other matters handled:

Date:

2. _____

3. _____

I had full responsibility for all cases listed in the application, or if not, I have attached an explanation.

Date: _____

Signature: _____