



THE BAR ASSOCIATION OF  
SAN FRANCISCO

**Lawyer Referral and Information Service**

301 Battery Street, 3rd Floor  
San Francisco, CA 94111  
Telephone: (415) 477-2374  
Fax: (415) 477-2389  
URL: <http://www.sfbar.org>

**APPLICATION FOR  
PROBATE, WILLS, ESTATE PLANNING WITH TRUSTS 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. Please do complete the application to the extent possible.

Certified Specialists

An applicant who is a certified Probate, Estate Planning & Trust Law specialist, and whose current certification will last through the current membership year, qualifies automatically and may choose to receive referrals in any or all categories. Otherwise, applicant must qualify as indicated below.

I am a certified Probate, Estate Planning & Trust Law specialist. Date certified: \_\_\_\_\_  
I would like to receive referrals in the following categories:  
Part A:  Class 1  Class 2  Class 3  Part B  Part C

Experience Qualifications

**Part A - Probate, Will Drafting, Conservatorships & Guardianships**

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**

1. \_\_\_\_\_
2. \_\_\_\_\_

**Class 2 - Will Drafting**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_

**Class 3 - Conservatorship and Guardianship (Excluding guardian ad litem)**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_

**Part B - Estate Planning with Trusts**

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

- 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: \_\_\_\_\_

**Part C - Will 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: \_\_\_\_\_

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

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

Date: \_\_\_\_\_ Signature: \_\_\_\_\_