



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  
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 plus have handled two tax matters to resolution.

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: \_\_\_\_\_

I have handled two tax matters to resolution:

<u>U.S. Tax Court number</u>	<u>Type of Tax Matter</u>	<u>Date Resolved</u>
1. _____	_____	_____
2. _____	_____	_____

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 (Examinations)

**-OR-**

**B)** For each class in which the applicant is interested in receiving referrals, applicant must be admitted to and in good standing with the U.S. Tax Court, and in the last three years, must have represented to resolution three matters in the class, one of which is a matter resolved through U.S. Tax Court.

**Under penalty of perjury I state that I am admitted to and in good standing with the U.S. Tax Court:**

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

**Class 1 - Personal Income Taxation**

Please list three matters handled to resolution involving personal income tax in the last three years, one of which is a matter resolved through U.S. Tax Court. Please provide the file number, agency involved, resolution reached, typed of tax matter and dates of representation.

File number	Agency	Type of matter	Resolution (Tax Court Y/N)	Dates of Representation
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

**Class 2 - Business Income Taxation**

Please list three matters handled to resolution involving personal income tax in the last three years, one of which is a matter resolved through U.S. Tax Court. Please provide the file number, agency involved, resolution reached, typed of tax matter, dates of representation and whether the matter was resolved through the U.S. Court.

File number	Agency	Type of matter	Resolution (Tax Court Y/N)	Dates of Representation
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

**Class 3 - Examinations**

Applicant must have handled to resolution three examinations in the last three years, one of which was resolved through the U.S. Tax Court. Please provide the file number, agency involved, resolution reached, typed of tax matter and dates of representation.

File number      Agency      Type of matter      Resolution (Tax Court Y/N)      Dates of Representation

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

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

3. \_\_\_\_\_

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

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

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