



San Francisco-Marin
LAWYER REFERRAL AND
INFORMATION SERVICE

THE BAR ASSOCIATION OF SAN FRANCISCO

San Francisco- Marin Lawyer Referral & Information Service

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<http://www.sfbar.org>

**APPLICATION FOR
BUSINESS LAW PANEL**

(Please complete the application to the extent possible if applying under Rule 6 below)

Name: _____

State Bar number: _____

Telephone: _____

Fax: _____

E-mail address: _____

San Francisco office address: _____

Marin County office address: _____

Mailing address (if different): _____

Number of years of continuous active practice in California: _____

Please check all that apply: I am applying for the ☐ San Francisco panel / ☐ Marin County panel

Substantial Equivalent Experience - Under Rule 6: 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.

PART A

Within the past five years, applicant must have handled two matters within EACH selected class (including Class 4A) with the exception of Class 5, for which applicant must have actively represented one business in each selected subclass.

- | | |
|---|--|
| <input type="checkbox"/> (1) Formation of a Business Entity | <input type="checkbox"/> (5) Ongoing Business Consulting |
| <input type="checkbox"/> (2) Dissolution of a Business Entity | <input type="checkbox"/> (A) Retail and wholesale sales |
| <input type="checkbox"/> (3) Sale of all or part of a Business | <input type="checkbox"/> (B) Construction |
| <input type="checkbox"/> (4) Business Disputes, e.g., claimed breach of contracts, etc. | <input type="checkbox"/> (C) Business with alcohol sales |
| <input type="checkbox"/> (A) ADA Compliance for business owners | |

Class 1 - Formation of a Business Entity

Nature of Business Entity

1. _____

2. _____

Inclusive dates of representation

Class 2 - Dissolution of a Business Entity

Nature of Business Entity

1. _____
2. _____

Inclusive dates of representation

Class 3 - Sale of all or part of a Business

Nature of Business or type of transaction

1. _____
2. _____

Inclusive dates of representation

Class 4 – Business Disputes

Nature of Dispute

1. _____
2. _____

Inclusive dates of representation

Class 4 (A) - ADA Compliance for Business Owners

Applicants interested to advise and represent business owners with ADA compliance issues must have handled within the last five years, two cases on behalf of facilities or business entities with respect to ADA compliance litigation and must have a working knowledge of the American's with Disabilities Act, and California's Unruh Civil Rights Act and Disabled Persons Act.

I certify that I have a working knowledge of the American's with Disabilities Act, and California's Unruh Civil Rights Act and Disabled Persons Act because:

Date: _____ Signature: _____

Class 4 (A) – ADA Compliance Litigation

1. Case Name: _____ Date Filed: _____

County/Case #/Court: _____

Nature of case: _____

Name of business entity: _____

Judgment or other resolution: _____

2. Case Name: _____ Date Filed: _____

County/Case #/Court: _____

Nature of case: _____

Name of business entity: _____

Judgment or other resolution: _____

Class 5 - Ongoing Business Consulting: I certify that I have actively represented at least one business within each indicated subclass within the past five years.

Nature of Business:

Inclusive dates of representation

(A) Retail and wholesale sales:

(B) Construction:

(C) Business with alcohol sales:

PART B

Within the past 5 years, applicant must have handled three significant matters within EACH selected class. Do not list names of clients.

- ☐ (1) International trade agreements
- ☐ (2) Customs regulations
- ☐ (3) Antitrust or unfair competition

- ☐ (4) Pension or profit sharing plans
- ☐ (5) Securities issuance
- ☐ (6) Securities litigation

Three (3) matters for class _____:

Nature of Matter

Inclusive dates of representation

1. _____

2. _____

3. _____

Three (3) matters for class _____:

Nature of Matter

Inclusive dates of representation

1. _____

2. _____

3. _____

Three (3) matters for class _____:

Nature of Matter

Inclusive dates of representation

1. _____

2. _____

3. _____

Please attach continuation sheets for additional classes in Part B.

PART C

Cannabis Business Matters: Education and Experience Requirements

Continuing Legal Education requirements:

Within the year of application approval must complete at least FIVE hours of Cannabis related education, e.g. Cannabis start-up business, regulations, compliance, audit, federal and state law issues, etc.

	Title of Training	Date(s) of training	Number of Hours	Provider	Self-Study (S) Participate (P)
1.					
2.					
3.					
4.					
5.					

Class 1 – Cannabis Business Matters

Within the past three years, applicant must have handled a minimum of five cannabis business related matters, any type: completed applications for licensing and permitting, of a cannabis business and be familiar with the subsection of cannabis regulations that apply to licensing.

Nature of Cannabis Business Matter	Inclusive dates of representation
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

☐ I declare that I am familiar with the subsection of cannabis regulations that apply to licensing.

Class 2 – Cannabis Business Formation

Within the last year, applicant must have completed a minimum of five business formation set ups, of any type.

Nature of Business Entity	Inclusive dates of representation
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

Class 3 – Cannabis Tax compliance and audit

Within the last three years, applicant must have handled at least three tax audits (of any type).

File number	Type of matter	Dates of Representation
-------------	----------------	-------------------------

1. _____
2. _____
3. _____

Class 4 – Cannabis Business Compliance, Audits, Corporate Governance and Ethics

Within the last three years, please list your experience with a minimum of two matters related to compliance and/or corporate governance or audit of any type, within the last three years.

File number	Type of matter	Dates of Representation
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1. _____
2. _____

Class 5 – Cannabis Business Intellectual Property: License Agreements Trademark, Trade Secrets

Trademark

Within the last year, applicant must have experience with a minimum of two completed, cannabis trademark registrations.

Nature of Matter	Inclusive dates of representation
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- | | |
|----------|-------|
| 1. _____ | _____ |
| 2. _____ | _____ |
| 3. _____ | _____ |
| 4. _____ | _____ |
| 5. _____ | _____ |

Trade Secrets

Within the last year, applicant must have experience with a minimum of two negotiated trade secret contracts, with non-disclosure and licensing provisions as part of the contracts.

Nature of Matter	Inclusive dates of representation
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1. _____

2. _____

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

Date: _____ Signature: _____