



San Francisco-Marin
LAWYER REFERRAL AND
INFORMATION SERVICE

THE BAR ASSOCIATION OF SAN FRANCISCO

Lawyer Referral and Information Service

201 Mission Street, 4th Floor

San Francisco, CA 94105

Telephone: (415) 477-2374

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<http://www.sfbar.org>

**APPLICATION FOR
PROBATE, WILLS, ESTATE PLANNING WITH TRUSTS PANEL**

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

Name: _____

State Bar number: _____ E-mail address: _____

Telephone: _____ Fax: _____

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.

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: _____