

**LAWYER REFERRAL SERVICE  
SAN MATEO COUNTY BAR ASSOCIATION  
333 BRADFORD STREET, SUITE 200  
REDWOOD CITY, CA 94063  
(650) 298-4030**

Application and Qualification Statement for  
**ESTATE PLANNING/PROBATE SUBJECT PANEL**

Name: \_\_\_\_\_ State Bar# \_\_\_\_\_

Office Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Number of continuous active years practiced in California \_\_\_\_\_

I have practiced estate planning/probate law at least three (3) years. Admission Year: \_\_\_\_\_

**You must have been the attorney of record and have 3-years experience in this area of law. If your experience is outside California or you do not meet the requirements listed for membership, but believe you have substantial equivalent experience, please state how and why your experience should be considered on a separate sheet of paper and attach it to this application. If you have questions concerning this application or your equivalent experience, please contact the San Mateo County Bar Association Lawyer Referral Office at the address and number listed above.**

**Certified Specialists**

An applicant who is a certified Estate Planning, Trust, and Probate Law specialist, and whose current certification will last through the current membership year, automatically qualifies for all subpanels. Otherwise, applicant must satisfy the qualifications for all Estate Planning/Probate subpanel(s) that are applicable.

Please check box if you are a certified Estate Planning, Trust, and Probate Law specialist. If so, you **do not** need to complete this application any further.

**Wills, Trusts and Estate Planning**

I have prepared three dispositive instruments listed below within the last 24 months, at least one of which involved the preparation of a testamentary or living trust.

Type of Instrument	Date
1. _____	_____
2. _____	_____
3. _____	_____

**Petition for Conservatorships/Guardianships/LPS**

I have been counsel of record in at least two proceedings within the last 24 months involving petitions for the conservatorship and guardianship of a person and/or on estate.

Case Name	Docket No.	Court	Year	Disposition
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____

**Administration of Decedent's Estates (including probate matters)**

I have been counsel of record in at least two decedents' estates in the last 24 months, at least one of which required court supervised administration:

Case Name	Docket No.	Court	Year	Disposition
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____

**Elder Law, Financial Elder Abuse**

In order to be referred matters in this panel, the member demonstrate experience in this area of practice. As evidence of experience, please supply the committee with the list of at least two cases (civil or criminal) through discovery to either a settlement, or trial within the last 5 years and supply the name of the case, the court, the year the matter resolved, and a brief statement as to the nature of the matter.

Case Name	Court	Year
1. _____	_____	_____

Brief description of matter:

\_\_\_\_\_

\_\_\_\_\_

Case Name Court      Year

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

Brief description of matter:

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**Medi-Cal Planning / Elder Law**

In order to be referred matters in this panel, the member must demonstrate experience in this area of practice. As evidence of experience, please supply the committee with a list of at least three matters where you have worked with Medi-Cal applicants in qualifying for Medi-Cal benefits and/or positioning assets as part of Medi-Cal planning during the last two years.

Case Name Court      Year

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

Brief description of matter:

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Case Name Court      Year

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

Brief description of matter:

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Case Name Court      Year

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

Brief description of matter:

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**Probate Litigation**

I have been counsel of record in litigation on behalf of a claimant in probate within the last 36 months:

Case Name	Docket No.	Court	Year
1. _____	_____	_____	_____
2. _____	_____	_____	_____

**Estate Litigation**

I have been counsel of record in litigation on behalf of a claimant in an estate within the last 36 months:

Case Name	Docket No.	Court	Year
1. _____	_____	_____	_____
2. _____	_____	_____	_____

I submit the above information in support of my application for the San Mateo County Lawyer Referral Service Estate Planning/Probate Experience Panel and I agree to cooperate with the Service in facilitating reasonable verification of the same. I have read and am familiar with the Rules of the San Mateo County Bar Association Lawyer Referral Service and agree to abide by them.

I declare under penalty of perjury that the foregoing is true and correct.

Executed at \_\_\_\_\_, California

on the \_\_\_\_\_ Day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Signature of Applicant

*If you are unable to meet the above experience panel qualifications, you may submit in writing and attach to the experience Statement, a statement under penalty of perjury of what you believe to be sufficient equivalent experience to qualify you for this panel.*