

LAWYER REFERRAL & INFORMATION SERVICE
of the
San Diego County Bar Association

Application for **PROBATE** Panel Membership

Complete this form and return to the LAWYER REFERRAL & INFORMATION SERVICE,
1333 Seventh Avenue, San Diego, California, 92101.

FOR OFFICE USE ONLY			
State Bar Date _____	State Bar # _____	Record of Discipline ____ YES ____ NO	
SDCBA Member ____ YES ____ NO		Insurance Expiration _____	

(PLEASE TYPE or PRINT BELOW)

(Last Name) _____ (First Name) _____ (Initial) _____ (Telephone) _____

(Complete Office Address Including Zip Code)

I, _____, declare that:

- I am certified by the California Board of Legal Specialization as a specialist in the filed of Probate, Estate Planning and Trust Law. Attached is a copy of my certificate. This qualifies me for membership on the panel without the necessity of completing the remainder of this form.

OR,

1. Within the last three years I have handled the following:

A. At least four estate administration proceedings through final distribution;

<u>Case Name</u>	<u>Court and File Number</u>	<u>Description of Matter</u>	<u>Work I Performed</u>
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(1)

(2)

(3)

(4)

AND

B. Prepared and processed at least two accountings in a decedent's estate; and

<u>Case Name</u>	<u>Court and File Number</u>	<u>Description of Matter</u>	<u>Work I Performed</u>
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(1)

(2)

AND

C. Handled at least three (3) of the following matters: (three different matters required)

- (1) The contest of a Will
- (2) Petition to Determine Heirship
- (3) Petition for Instructions
- (4) A trust Termination
- (5) Preparation and Filing of IRS Form 706
- (6) Preparation and Filing of a Spousal Property Petition
- (7) Petition for family allowance
- (8) Petition for confirmation of sale of real property
- (9) Determine Succession to Real Property, estates less than \$100,000
- (10) Declaration/Affidavit pursuant to Probate Section 13100

<u>Case Name</u>	<u>Court and File Number</u>	<u>Description of Matter</u>	<u>Work I Performed</u>	<u>List item from above 1-10</u>
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(1)

(2)

(3)

2. Other information, which I believe may be relevant: (Optional)

3. Attach exhibits if necessary.

4. Attached are two "Recommendation of Professional Qualification" forms from California lawyers or judges attesting to my qualifications in the area for which I am applying. **These form letters specifically reflect the authors' knowledge of my qualifications and include the writers' opportunity to observe my qualifications in the area for which I am applying.** If these form letters are from lawyers, they are not affiliated with my firm nor do I have any economic interest with them. (Revised 5/00)

5. I am not now nor have I been the subject of any bar association disciplinary proceedings, and I further state that I have never been the subject of suspension or disbarment.

Executed at _____, California, on _____, 20_____.

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

(Signature)

Application forms for all other panels are available at the LRIS office,
1333 Seventh Avenue, San Diego, California, 92101. Telephone (619) 231-8585