



SUBJECT MATTER PANEL APPLICATION

WILLS, TRUSTS & ESTATES

An applicant who is currently certified as a legal specialist by the California Board of Legal Specialization will automatically meet the experience requirements. Otherwise, applicant must certify experience requirements as indicated below.

CRITERIA: Applicant must have handled, within the last three years, not fewer than three cases in the subject matter area through final resolution.

EDUCATION REQUIREMENTS: An applicant practicing law for less than three years must certify that s/he has completed not less than four hours of State Bar approved MCLE credits in the subject area of the panel for each year of practice.

An applicant practicing law for three or more years must certify that s/he has completed not less than six hours of State Bar approved MCLE credits in the subject area of the panel during the three years preceding the application.

LIBRARY REQUIREMENTS: Applicant must have access to annotated codes and case reporters for all relevant authorities in the subject matter of the panel.

Applicant must have access to all treatises and practitioner manuals in the subject area of the panel (e.g., those published by CEB and The Rutter Group).

EXPERIENCE REQUIREMENTS: Applicant must have successfully performed to completion all legal work, including the preparation or supervising of the preparation of all legal documents, in not less than three client matters similar to the matters included in the panel subject areas checked above.

I hereby certify under penalty of perjury that I have met the above criteria and requirements, and that I am competent to handle Wills, Trusts & Estates referral matters in the panel subject areas checked above.

Attorney's Name _____.

Attorney's Signature _____ Date _____