

Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Office Address: \_\_\_\_\_  
( zip code)

**PROBATE, GUARDIANSHIP & CONSERVATORSHIP  
EXPERIENCE STATEMENT**

Within the past three (3) years, applicant has handled at least five proceedings under the Probate Code to transfer property from a decedent, at least two of which included Item A, below. The remaining three proceedings under the probate code shall include any of the following:

- (A) Full probate administration (from petitioning for appointment of the personal representative through discharge of the personal representative);
- (B) Spousal property petition (PC 13650);
- (C) Spousal transfers (PC 13500, et seg)
- (D) Affidavit transfer of personal property (PC 13100);
- (E) Court order determining succession to property (PC 13150);
- (F) Affidavit procedure for real property (PC 13200);
- (G) Trust dissolution; and
- (H) Administration of living trust on death of first spouse.

Applicant has also completed at least three of the following (not necessarily in the same proceeding):

- (A) Responsibility for preparation and approval of formal accounting;
- (B) Confirmation of public or private sale of real property;
- (C) Responsibility for preparation of federal estate tax return;
- (D) Responsibility for preparation of fiduciary income tax returns;
- (E) Will contest or other litigation by or against an estate and/or representative; and
- (F) Action under the Independent Administration of Estates Act requiring the giving of notice.

(continued)

For the Conservatorship and Guardianship subpanel, applicant must have, within the past three (3) years, prepared either two conservatorship and/or guardianships from petitioning for appointment through the first accounting.

**OR is a Certified Specialist, Probate/Guardianship & Conservatorship, California Board of Legal Specialization.**

**Probate/Guardianship & Conservatorship Specialist:**            Yes (   )

**Date Certified or Re-Certified:** \_\_\_\_\_

Identification of Listed Cases:            If matter is on public record, identify court or agency and give or agency and file number; if office matter only, give office designation but omit client's name.

Date: Give month and year the required experience was completed. Per Rule 2, Section IV of the Lawyer Referral Service Rules, minimum experience requirements must have been completed within (3) years immediately preceding application for panel membership.”

Probate Code Proceeding:

<u>Identification</u>	<u>Date (month/year)</u>
First Matter: _____	_____
Second Matter: _____	_____
Third Matter: _____	_____

Probate Code Proceedings Involving Full Probate administration (from petitioning for appointment of the personal representative through discharge of the personal representative):

First Matter: _____	_____
Second Matter: _____	_____

(continued)

AND has completed at least three (3) of the following (not necessarily in the same proceeding):

Identification

Date (month/year)

(I) Responsibility for preparation and approval of formal accounting:

Matter: \_\_\_\_\_

(II) Confirmation of public or private sale of real estate:

Matter: \_\_\_\_\_

(III) Responsibility for preparation of federal estate tax return;

Matter: \_\_\_\_\_

(IV) Responsibility for preparation of fiduciary income tax returns;

Matter: \_\_\_\_\_

(V) Will contest or other litigation by or against an estate and / or representative; and

Matter: \_\_\_\_\_

(VI) Action under the Independent Administration of Estates Act requiring the giving of notice.

Matter: \_\_\_\_\_

For the Conservatorship and Guardianship through the First Accounting:

First Matter: \_\_\_\_\_

Second Matter: \_\_\_\_\_

I submit the above information in support of my application for panel membership in the Lawyer Referral Service of the Santa Clara County Bar Association; I agree to cooperate with the Service in facilitating reasonable verification thereof and otherwise reviewing my qualifications for the Probate, Guardianship & Conservatorship panel under the Rules of Operation; and I further declare under penalty of perjury that the foregoing is true and correct in all respects.

\_\_\_\_\_  
Date

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