

Name: _____ Telephone: _____

Office Address: _____
zip code

EXPERIENCE STATEMENT - WILLS, TRUST & ESTATE PLANNING

Within the past three years I have handled (been personally responsible) for the following matters which demonstrates in my judgment that I meet or exceed the minimum experience qualifications as specified below.

WILLS, TRUST, & ESTATE PLANNING QUALIFICATIONS

Applicant has been responsible for the preparation of five (5) major estate planning documents which devise property. Preparation of these documents shall include interviewing the client, drafting the document and supervising the execution of the document. At least two of the major estate planning documents shall be living trusts with “pour-over” Wills, and at least one of the major estate planning documents shall be a testamentary trust (for instance, a contingent trust for children or grandchildren).

OR is a Certified Specialist, Wills, Trusts & Estate Planning, California Board of Legal Specialization.

Wills/Trusts/Estate Planning Specialist: Yes ()

Date Certified or Re-Certified: _____

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

Date: Give month and year the required experience was completed in the matter.

(Identification)

(Date)

First Matter: _____

Second Matter: _____

(continued)

Living trust with “ pour-over” wills (identification and date)

First Matter: _____

Second Matter: _____

Testamentary trust will (identification and date)

First Matter: _____

I submit the above information in support of my application for panel membership in the Lawyer Referral Service; I agree to cooperate with the Service in facilitating reasonable verification thereof and otherwise reviewing my qualifications for the Wills, Trusts & Estate Planning panel under the Rules; and I further declare under penalty of perjury that the foregoing is true and correct in all respects.

Date

Signature of Applicant