

Estate Planning & Probate 2011 - 2012

Subject Matter Application

(Revised 05/31/2011)

Name: (please print) _____

Are you Board Certified in Estate Planning? _____ yes _____ no (If yes, please indicate below the panels in which you wish to receive referrals. You are not required to provide a list of cases. You may choose an unlimited number of categories below.)

If you are not Board Certified, please complete the application.

Where required, please provide a typed list of cases handled including case name, cause number, party names, year of disposition, brief description of case type and resolution.

Panel	Requirements
<input type="checkbox"/> Will contests or trust dispute <input type="checkbox"/> Contested guardianship <input type="checkbox"/> Lawsuits involving a fiduciary	<p>___ For EACH selected panel, I have handled two (2) cases within the last three (3) years</p> <p>Provide list of two (2) cases as lead attorney of any kind (civil or criminal) through bench or jury trial within the last five (5) years</p> <p>___ I certify that 20% of my practice is in tax, estate planning, or probate law and I have disclosed this percentage on my application for malpractice insurance. I certify that I have nine (9) hours CLE in tax, estate planning, or probate law in the past three (3) years.</p>
<input type="checkbox"/> Draft wills (with estate tax planning, trusts, family partnerships)	<p>Must have participated in preparing three (3) taxable estates, living trusts, family partnership provisions within the past three (3) years</p> <p>___ I certify that 20% of my practice is in tax, estate planning, or probate law and I have disclosed this percentage on my application for malpractice insurance. I certify that I have nine (9) hours CLE in tax, estate planning, or probate law in the past three (3) years.</p>
<input type="checkbox"/> Specialty trusts <input type="checkbox"/> Elder Law <input type="checkbox"/> Nursing home Medicaid planning <input type="checkbox"/> Medicare benefits/liens <input type="checkbox"/> Reverse mortgages <input type="checkbox"/> Adult Protective Services	<p>___ I certify that 20% of my practice is in tax, estate planning, or probate law and I have disclosed this percentage on my application for malpractice insurance. I certify that I have nine (9) hours CLE in tax, estate planning, or probate law in the past three (3) years.</p>

For panels, you are not required to prove prior experience.

- Simple wills, wills with trusts (draft / review)
- Probate simple will, uncontested
- Guardianship, uncontested
- Durable powers of attorney
- Match Program simple wills (reduced fee)
- Match Program uncontested guardianship (reduced fee)

I certify that I meet the membership requirements for receiving referrals from LRS in this area and will maintain compliance with the requirements as long as I accept these referrals.

Date _____ Signature _____