

WILLS & ESTATE LAW 2009
Subject Matter Application (updated 3/9/08)

Please print:

Name: _____ Firm: _____

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 cause and style numbers. You may choose an unlimited number of categories below. Please sign the form before mailing.

If not board certified, please complete the form, providing the corresponding information. You may choose an unlimited number of sub panels below (for which you are qualified). Please sign the form before mailing.

PART A: LITIGATION

For EACH selected panel, you must have handled **within three (3) years of the date of this application**, through discovery, two (2) cases in the sub panel, AND **within five (5) years of the date of this application** must have handled two (2) cases of any kind (civil or criminal) through bench or jury trial in any court of record.

Please select the categories in which you wish to receive referrals.

- ___ (WX1) Will contests or trust disputes
- ___ (WX2) Contested temporary or permanent guardianships
- ___ (WX3) Lawsuits involving a fiduciary

Identify two (2) cases **within three (3) years of the date of this application** through discovery in same sub panels as you wish to receive referrals. Repeat for each sub panel, using the extra sheet if necessary.

1. Style, Case No., County: _____ Year of Disposition _____

Nature of Case _____

Judgment or resolution _____ Your client _____

2. Style, Case No., County: _____ Year of Disposition _____

Nature of Case _____

Judgment or resolution _____ Your client _____

Identify two (2) cases **within the last five (5) years of the date of this application** of any kind through discovery. Do not repeat for each sub panel.

1. Style, Case No., County: _____ Year of Disposition _____

Nature of Case _____

Judgment or resolution _____ Your client _____

2. Style, Case No., County: _____ Year of Disposition _____

Nature of Case _____

Judgment or resolution _____ Your client _____

PART B: TRANSACTIONS

___ (WX4) Drafting of wills, trusts with estate tax planning

___ (WX5) Living trusts

___ (WX6) Federal estate tax returns

___ For referrals involving wills and trusts for estates requiring tax planning, I certify that I have participated in preparing three (3) taxable estates and/or drafting of living trusts and/or family partnerships **within three (3) years of the date of this application.**

___ 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.

PART C

For any of the selected sub panels below, you are not required to prove prior experience. Please indicate the sub panels in which you wish to receive referrals.

___ (WE1) Drafting simple wills, wills with trusts, living trusts for non-taxable estates

___ (WE2) Filing a will for probate, no contest expected

___ (WE3) Applications for uncontested or permanent temporary guardianship

___ (WE4) Durable powers of attorney

___ (WE5) Elder law

I had full responsibility for all cases listed in the application, or if not, I have attached an explanation.

Date _____ Signature _____

Please complete the application as completely as possible. If you believe that you have other relevant experience, please elaborate on an attached sheet.