

Estate Planning & Probate Experience Panel Application

Name: (please print) _____

Are you Board Certified in Wills, Trusts and Estates? ☐ yes ☐ no (If yes, please indicate below the panels from 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, party names, year of disposition, brief description of case type and resolution.

Panel	Requirements
☐ Guardianship, contested ☐ Lawsuits involving a fiduciary ☐ Will contests or trust dispute ☐ Probate, contested	☐ For EACH selected panel, I have handled two (2) cases within the past three (3) years. Please provide list. Provide list of two (2) cases as lead attorney of any kind (civil or criminal) through bench or jury trial within the past five (5) years. ☐ I certify that at least 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 within the past three (3) years.
☐ Draft wills (complex/ estate tax planning, trusts, family partnerships)	Must have participated in preparing three (3) taxable estates, living trusts, family partnership provisions within the past three (3) years. Please provide list. ☐ I certify that at least 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 within the past three (3) years.
☐ Specialty trusts ☐ Elder Law ☐ Adult Protective Services ☐ Medicare benefits/liens ☐ Nursing home Medicaid planning ☐ Reverse mortgages ☐ Financial Exploitation of the Elderly	☐ I certify that at least 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 within the past three (3) years.

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

- ☐ Durable powers of attorney
- ☐ Guardianship, uncontested
- ☐ Guardian advocacy
- ☐ Probate, uncontested
- ☐ Wills, wills with trusts (draft / review)

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

Date _____ Signature _____