



**ATTORNEY REFERRAL SERVICE**  
**TAXATION LAW PANEL**  
**Statement of Qualifications**

Please check all areas that apply

- ☐ Federal, State and Personal, Trust, and Estate Income Taxes
- ☐ Business
- ☐ Audits
- ☐ Tax Litigation
- ☐ Interstate/International

**I. Certified Specialist:**

An applicant who is currently certified as a legal specialist by the California Board of Legal Specialization will automatically meet the experience requirements.

\_\_\_\_\_ I am certified as a Specialist in Taxation Law by the State Bar.  
(Initial)

**II. Minimum Education and Experience Qualifications: (If not certified check all that apply)**

To qualify for Taxation Law referrals I attest to the following:

- ☐ I have duly been admitted to practice in the United States District Court for the Central District of California and the United States Tax Court.
- ☐ Within the previous year, I have completed twelve (12) hours of continuing legal education in the Taxation Law area.
- ☐ Within the last two (2) years, I have prepared or have provided significant assistance in the preparation of at least one (1) tax opinion.
- ☐ Within the last three (3) years, I have represented at least five (5) tax matters before, the Internal Revenue Service, or the Administration Franchise Tax Board, or the State Board of Equalization, or the United States Tax Court, or the United States District Court.

**III. Minimum Library Requirements:**

Applicant must have access to annotated codes and case reporters for all relevant authorities.

**IV. Application for Special Consideration:**

In lieu of, or in addition to, the above provisions, an applicant may make application to the LRIS Committee, in person or in writing, for consideration of the attorney's legal education, experience and special qualifications for participation on the Taxation Law Panel.

I understand that the information contained herein is subject to reasonable verification and I agree to cooperate with the LRIS Committee and its designees in the process of evaluating my qualifications. I declare, under penalty of perjury that I have met the above criteria and requirements, and that I am competent to handle Taxation Law referral matters in the panel subject areas checked above.

Attorney Name\_\_\_\_\_

Signature\_\_\_\_\_ Date\_\_\_\_\_



## ATTORNEY REFERRAL SERVICE

## Taxation Law Experience & Qualifications Statement

### Continuing Legal Education (12 Hours)

[illegible]

## Taxation Law Experience & Qualifications Statement

### Tax Opinion Preparation

<b>Date Completed:</b> _____
<b>Description of Mater:</b> _____
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<b>Description of Work Done:</b> _____
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**ATTORNEY REFERRAL SERVICE**  
Taxation Law Experience & Qualifications Statement  
Tax Matters

**Matter No. 1**

Agency/Court: \_\_\_\_\_ Case or Docket No.: \_\_\_\_\_

Description of Work Done: \_\_\_\_\_

\_\_\_\_\_

Conclusion/Verdict: \_\_\_\_\_

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\_\_\_\_\_

**Matter No. 2**

Agency/Court: \_\_\_\_\_ Case or Docket No.: \_\_\_\_\_

Description of Work Done: \_\_\_\_\_

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Conclusion/Verdict: \_\_\_\_\_

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**Matter No. 3**

Agency/Court: \_\_\_\_\_ Case or Docket No.: \_\_\_\_\_

Description of Work Done: \_\_\_\_\_

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Conclusion/Verdict: \_\_\_\_\_

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**Matter No. 4**

Agency/Court: \_\_\_\_\_ Case or Docket No.: \_\_\_\_\_

Description of Work Done: \_\_\_\_\_

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Conclusion/Verdict: \_\_\_\_\_

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**Matter No. 5**

Agency/Court: \_\_\_\_\_ Case or Docket No.: \_\_\_\_\_

Description of Work Done: \_\_\_\_\_

\_\_\_\_\_

Conclusion/Verdict: \_\_\_\_\_

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Use additional sheets if necessary