



ELDER LAW PANEL

STATEMENT OF QUALIFICATIONS

APPLICANT INFORMATION:

NAME: _____

NAME OF FIRM: _____

YEAR OF ADMISSION TO THE STATE BAR _____

TELEPHONE: () _____

I. CERTIFIED SPECIALIST (NAELA) (Certification qualifies the holder to join the Panel.)

I am currently certified as a Specialist in Elder Law by the National Elder Law Foundation (NELF).

II. ELDER LAW - Minimum Qualifications (If not certified)

To qualify for Elder Law referrals, I attest to all of the following:

A. Within the past three (3) years, I have prepared at least five (5) living trusts involving long term care planning, and handled at least two (2) real property transfers including multiple tax consequences/issues.

B. Within the past two (2) years, I have attended the following special training workshop(s)/educational program(s) for at least six (6) hours on Medi-Cal planning:

<u>Date</u>	<u>Title of Workshop/Educational Program</u>	<u>Hours</u>	<u>Sponsor/Location</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____

C. Within the past year, I have prepared at least three Durable Powers of Attorney for Health Care and three for Financial matters involving long term care planning, and

D. Within the past year, I have handled at least two (2) Medi-Cal Long Term Care planning cases. Please describe on a separate sheet of paper: (i.e., filling out Medi-Cal applications, preparing and attending a fair hearing, court transfer of assets, etc.)

III. NURSING HOME ABUSE OR OTHER ELDER ABUSE LITIGATION - Minimum Qualifications
(If not certified)

To qualify for Elder Law Nursing Home Abuse or Other Elder Abuse Litigation, I attest to two or more of the following:

- A. Within the past two (2) years, I have conducted or attended the following special training workshop(s) for at least six (6) hours on Elder Law Nursing Home Abuse and/or Other Elder Abuse Litigation:

	<u>Date</u>	<u>Title of Workshop</u>	<u>Hours</u>	<u>Sponsor/Location</u>
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

- B. Within the past year, I certify to having handled at least one (1) Elder Law Nursing Home Abuse or Other Elder Abuse case through verdict or decision. For each matter, provide the following information:

	<u>Date</u>	<u>Court/Jurisdiction</u>	<u>Case No.</u>	<u>Verdict/Conclusion</u>
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

- C. Within the past two years, I certify to having resolved, through Arbitration, Mediation or settlement, no less than 4 Elder Law Nursing Home Abuse or Other Elder Abuse cases, for a combined total sum (i.e. award) of not less than \$250,000. For each matter, provide the following information:

	<u>Date of Resolution</u>	<u>Court/Jurisdiction</u>	<u>Case No.*</u>	<u>Amount</u>
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____

*If subject to confidentiality, in lieu of case number indicate 'CONFIDENTIAL' and also briefly describe nature of dispute.

IV. APPLICATION FOR SPECIAL CONSIDERATION:

In lieu of, or in addition to, the above provisions, a panel attorney may make application to the Lawyer Referral & Information Service Committee, in person or in writing, for consideration of the attorney's legal education, experience and special qualifications for participation on the Elder Law Panel.

I submit this Statement of certification or () Minimum () Alternate Qualifications or other evidence of my eligibility to participate on the Elder Law Panel of the Orange County Bar Association Lawyer Referral & Information Service. I understand that the information contained herein is subject to reasonable verification and I agree to cooperate with the Lawyer Referral & Information Service Committee and its designees in the process of evaluating my qualifications. I declare, under penalty of perjury, that the foregoing is true and correct.

SIGNATURE OF APPLICANT

DATE