



San Francisco-Marin  
LAWYER REFERRAL AND  
INFORMATION SERVICE

THE BAR ASSOCIATION OF SAN FRANCISCO

**San Francisco- Marin Lawyer Referral & Information Service**

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San Francisco, CA 94105

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<http://www.sfbar.org>

**APPLICATION FOR  
BUSINESS LAW PANEL**

*(Please complete the application to the extent possible if applying under Rule 6 below)*

Name: \_\_\_\_\_ State Bar number: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail address: \_\_\_\_\_

San Francisco office address: \_\_\_\_\_

Marin County office address: \_\_\_\_\_

Main address (if not in SF/Marin, please provide your address recorded with the State Bar of California):

\_\_\_\_\_

(office number and street)

(suite #)

(zip)

\* If applicant's main office is outside of San Francisco or Marin Counties, they are encouraged to provide qualifying matters or filings in San Francisco or Marin. At their discretion, the LRIS Director and the LRIS Qualifications Sub-Committee may request information about provided experience and/or peer references on any panel application.

Number of years of continuous active practice in California: \_\_\_\_\_

Please check all that apply: I am applying for the  San Francisco panel /  Marin County panel

Substantial Equivalent Experience - Under Rule 6: If you cannot meet the following requirements for panel membership, but believe that you qualify by reason of substantial, equivalent experience, you may submit an outline of such experience, as provided for in Rule 6 of the Lawyer Referral and Information Service Rules.

**PART A**

Within the past five years, applicants must have handled two matters within EACH selected class (including Class 4A) with the exception of Class 5, for which applicant must have actively represented one business in each selected subclass.

- (1) Formation of a Business Entity
- (2) Dissolution of a Business Entity
- (3) Sale of all or part of a Business
- (4) Business Disputes, e.g., claimed breach of contracts, etc.
  - (A) ADA Compliance for business owners
- (5) Ongoing Business Consulting
  - (A) Retail and wholesale sales
  - (B) Construction
  - (C) Business with alcohol sales

**Class 1 - Formation of a Business Entity**

Nature of Business Entity

Inclusive dates of representation

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

**Class 2 - Dissolution of a Business Entity**

Nature of Business Entity

Inclusive dates of representation

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

**Class 3 - Sale of all or part of a Business**

Nature of Business or type of transaction

Inclusive dates of representation

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

**Class 4 – Business Disputes**

Nature of Dispute

Inclusive dates of representation

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

**Class 4 (A) - ADA Compliance for Business Owners**

Applicants interested to advise and represent business owners with ADA compliance issues must have handled within the last five years, two cases on behalf of facilities or business entities with respect to ADA compliance litigation and must have a working knowledge of the American’s with Disabilities Act, and California’s Unruh Civil Rights Act and Disabled Persons Act.

I certify that I have a working knowledge of the American’s with Disabilities Act, and California’s Unruh Civil Rights Act and Disabled Persons Act because:

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

**Class 4 (A) – ADA Compliance Litigation**

1. Case Name: \_\_\_\_\_ Date Filed: \_\_\_\_\_

County/Case #/Court: \_\_\_\_\_

Nature of case: \_\_\_\_\_

Name of business entity: \_\_\_\_\_

Judgment or other resolution: \_\_\_\_\_

2. Case Name: \_\_\_\_\_ Date Filed: \_\_\_\_\_

County/Case #/Court: \_\_\_\_\_

Nature of case: \_\_\_\_\_

Name of business entity: \_\_\_\_\_

Judgment or other resolution: \_\_\_\_\_

**Class 5 - Ongoing Business Consulting:** I certify that I have actively represented at least one business within each indicated subclass within the past five years.

Nature of Business:

Inclusive dates of representation

(A) Retail and wholesale sales:

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(B) Construction:

\_\_\_\_\_

(C) Business with alcohol sales:

\_\_\_\_\_

**PART B**

Within the past 5 years, applicant must have handled three significant matters within EACH selected class. Do not list names of clients.

- (1) International trade agreements
- (2) Customs regulations
- (3) Antitrust or unfair competition
- (4) Pension or profit sharing plans
- (5) Securities issuance
- (6) Securities litigation

**Three (3) matters for class \_\_\_\_\_ :**

Nature of Matter

Inclusive dates of representation

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

**Three (3) matters for class \_\_\_\_\_ :**

Nature of Matter

Inclusive dates of representation

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

**Three (3) matters for class \_\_\_\_\_ :**

Nature of Matter

Inclusive dates of representation

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Please attach continuation sheets for additional classes in Part B.**

**PART C**

**Cannabis Business Matters: Education and Experience Requirements**

**Continuing Legal Education requirements:**

Within the year of application approval must complete at least FIVE hours of Cannabis related education, e.g. Cannabis start-up business, regulations, compliance, audit, federal and state law issues, etc.

	<b>Title of Training</b>	<b>Date(s) of training</b>	<b>Number of Hours</b>	<b>Provider</b>	<b>Self-Study (S) Participate (P)</b>
1.					
2.					
3.					
4.					
5.					

**Class 1 – Cannabis Business Matters**

Within the past three years, applicant must have handled a minimum of five cannabis business related matters, any type: completed applications for licensing and permitting, of a cannabis business and be familiar with the subsection of cannabis regulations that apply to licensing.

Nature of Cannabis Business Matter

Inclusive dates of representation

1. \_\_\_\_\_

2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

I declare that I am familiar with the subsection of cannabis regulations that apply to licensing.

**Class 2 – Cannabis Business Formation**

Within the last year, applicant must have completed a minimum of five business formation set ups, of any type.

Nature of Business Entity	Inclusive dates of representation
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

**Class 3 – Cannabis Tax compliance and audit**

Within the last three years, applicant must have handled at least three tax audits (of any type).

File number	Type of matter	Dates of Representation
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

**Class 4 – Cannabis Business Compliance, Audits, Corporate Governance and Ethics**

Within the last three years, please list your experience with a minimum of two matters related to compliance and/or corporate governance or audit of any type, within the last three years.

File number	Type of matter	Dates of Representation
1.	_____	_____
2.	_____	_____

**Class 5 – Cannabis Business Intellectual Property: License Agreements Trademark, Trade Secrets**

Trademark

Within the last year, applicant must have experience with a minimum of two completed, cannabis trademark registrations.

Nature of Matter	Inclusive dates of representation
1.	_____
2.	_____
3.	_____
4.	_____
5.	_____

Trade Secrets

Within the last year, applicant must have experience with a minimum of two negotiated trade secret contracts, with non-disclosure and licensing provisions as part of the contracts.

Nature of Matter	Inclusive dates of representation
1.	_____
2.	_____

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

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