



San Francisco-Marin  
LAWYER REFERRAL AND  
INFORMATION SERVICE

THE BAR ASSOCIATION OF SAN FRANCISCO

**Lawyer Referral and Information Service**

50 Fremont Street, Suite 1700

San Francisco, CA 94105

Telephone: (415) 477-2374

Fax: (415) 477-2389

<http://www.sfbar.org>

**APPLICATION FOR  
TAXATION 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

Federal Attorneys: If you are an attorney focused on practicing in the federal jurisdictions of tax, immigration or bankruptcy law please contact the LRIS for more information concerning CA state bar membership rules.

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.

Experience Qualifications: Applicant may qualify under **A** or **B**, below.

A) In order to be referred matters in the following classes, applicant must be a certified specialist in taxation law, OR have an LL.M. degree in taxation plus have handled two tax matters to resolution.

- I am a certified specialist in taxation law. Please indicate year certified: \_\_\_\_\_
- I have an LL.M. degree in taxation. Please indicate the school from which and the year in which you received your degree: \_\_\_\_\_

I have handled two tax matters to resolution:

U.S. Tax Court number	Type of Tax Matter	Date Resolved
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1. \_\_\_\_\_
2. \_\_\_\_\_

If certified specialist or LL.M., please indicate the class(es) for which you want referrals:

- Class 1 (Personal Income Taxation)
- Class 2 (Business Income Taxation)
- Class 3 (Examinations)

**-OR-**

B) For each class in which the applicant is interested in receiving referrals, applicant must be admitted to and in good standing with the U.S. Tax Court, and in the last three years, must have represented to resolution three matters in the class, one of which is a matter resolved through U.S. Tax Court.

**Under penalty of perjury I state that I am admitted to and in good standing with the U.S. Tax Court:**

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

**Class 1 - Personal Income Taxation**

Please list three matters handled to resolution involving personal income tax in the last three years, one of which is a matter resolved through U.S. Tax Court. Please provide the file number, agency involved, resolution reached, typed of tax matter and dates of representation.

File number	Agency	Type of matter	Resolution (Tax Court Y/N)	Dates of Representation
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

**Class 2 - Business Income Taxation**

Please list three matters handled to resolution involving personal income tax in the last three years, one of which is a matter resolved through U.S. Tax Court. Please provide the file number, agency involved, resolution reached, typed of tax matter, dates of representation and whether the matter was resolved through the U.S. Court.

File number	Agency	Type of matter	Resolution (Tax Court Y/N)	Dates of Representation
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

**Class 3 - Examinations**

Applicant must have handled to resolution three examinations in the last three years, one of which was resolved through the U.S. Tax Court. Please provide the file number, agency involved, resolution reached, typed of tax matter and dates of representation.

File number	Agency	Type of matter	Resolution (Tax Court Y/N)	Dates of Representation
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

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

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