

# Houston Lawyer Referral Service, Inc.

## Application for Probate & Estate Planning Experienced Panel

Applicant must be licensed and practicing at least five (5) years prior to applying. Attorneys Board Certified by TBLS in Probate Estate Planning Law are immediately eligible.

I, \_\_\_\_\_, hereby apply for membership on the Probate Experienced Panel, and I wish to receive referrals in the following areas:

\_\_\_ Probates                      \_\_\_ Will Drafting                      \_\_\_ Will Contests  
\_\_\_ Trusts/Estate/ Planning/Living Trusts                      \_\_\_ Guardianship

I have devoted approximately the following % of my time the following areas, in Texas, during the past five (5) years:

\_\_\_\_\_ Probates                      \_\_\_\_\_ Will Drafting                      \_\_\_\_\_ Will Contests  
\_\_\_\_\_ Trusts/Estate/ Planning/Living Trusts                      \_\_\_\_\_ Guardianship

For each of the above categories for which you wish to receive referrals, you must document you have handled, through to conclusion, the requisite number of cases within the time specified.

Probate                      Completed and/or processed five (5) probate matters within the last 24 months

Will Drafting                      Personally drafted 20 wills within the past 36 months, 10 of which involved tax provisions or other advanced estate planning instruments

Will Contests                      Represented five (5) parties on contested matters in Probate Court within the past 60 months

Trusts/Estate Planning & Living Trusts                      Personally drafted five (5) trusts and/or living trusts involving estate planning within the past 36 months

Guardianship                      Person/Estate - represented a party in at least five (5) guardianship Matters within the last 24 months

**Applicant must have completed 15 hours of CLE in the subject matter within the past 36 months. Attach list of CLE attendance to this form.**

### Documentation

#### Probate:

How many Probate cases have you been appointed to by the Court? \_\_\_\_\_

List approximate number of cases handled for each of the following, in Texas, during the past five years:

\_\_\_\_\_ Determination of heirship                      \_\_\_\_\_ Ancillary Will probates  
\_\_\_\_\_ Will probates with independent administrators

**PROB/WILL**

- \_\_\_\_\_ Will probates with dependent administrators
- \_\_\_\_\_ Will probates as muniment of title
- \_\_\_\_\_ Estate plans where Federal Estate Tax form 706 required
- \_\_\_\_\_ Probates completes with net assets over \$60,000 or interest in real property

1. Estate Name \_\_\_\_\_  
 Description \_\_\_\_\_  
 Date Concluded \_\_\_\_\_ Estate Number \_\_\_\_\_  
 County \_\_\_\_\_ Judge \_\_\_\_\_

2. Estate Name \_\_\_\_\_  
 Description \_\_\_\_\_  
 Date Concluded \_\_\_\_\_ Estate Number \_\_\_\_\_  
 County \_\_\_\_\_ Judge \_\_\_\_\_

3. Estate Name \_\_\_\_\_  
 Description \_\_\_\_\_  
 Date Concluded \_\_\_\_\_ Estate Number \_\_\_\_\_  
 County \_\_\_\_\_ Judge \_\_\_\_\_

4. Estate Name \_\_\_\_\_  
 Description \_\_\_\_\_  
 Date Concluded \_\_\_\_\_ Estate Number \_\_\_\_\_  
 County \_\_\_\_\_ Judge \_\_\_\_\_

5. Estate Name \_\_\_\_\_  
 Description \_\_\_\_\_  
 Date Concluded \_\_\_\_\_ Estate Number \_\_\_\_\_  
 County \_\_\_\_\_ Judge \_\_\_\_\_

**Will Drafting:**

List approximate number of cases handled for each of the following, in Texas, during the past five years:

\_\_\_\_\_ Complex Wills including provisions for testamentary trusts,

marital deduction and elections

\_\_\_\_\_ Revocable inter vivos trusts \_\_\_\_\_ Minor's (2503 c) trusts

\_\_\_\_\_ Simple Wills (no tax provisions)

I declare under penalty of perjury that I have drafted twenty (20) wills during the past three (3) years.

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

**Will Contests:**

List approximate number of cases handled for each of the following, in Texas, during the past five years:

\_\_\_\_\_ Will contest - representation of plaintiffs

\_\_\_\_\_ Will contest - representation of defendants

\_\_\_\_\_ Representation of third party claimants

1. Estate Name \_\_\_\_\_  
Description \_\_\_\_\_  
Date Concluded \_\_\_\_\_ Estate Number \_\_\_\_\_  
County \_\_\_\_\_ Judge \_\_\_\_\_

2. Estate Name \_\_\_\_\_  
Description \_\_\_\_\_  
Date Concluded \_\_\_\_\_ Estate Number \_\_\_\_\_  
County \_\_\_\_\_ Judge \_\_\_\_\_

3. Estate Name \_\_\_\_\_  
Description \_\_\_\_\_  
Date Concluded \_\_\_\_\_ Estate Number \_\_\_\_\_  
County \_\_\_\_\_ Judge \_\_\_\_\_

4. Estate Name \_\_\_\_\_  
Description \_\_\_\_\_  
Date Concluded \_\_\_\_\_ Estate Number \_\_\_\_\_  
County \_\_\_\_\_ Judge \_\_\_\_\_

5. Estate Name \_\_\_\_\_  
Description \_\_\_\_\_  
Date Concluded \_\_\_\_\_ Estate Number \_\_\_\_\_  
County \_\_\_\_\_ Judge \_\_\_\_\_

**Trust, Estate Planning and Living Trusts:**

I declare under penalty of perjury that I have prepared five (5) trusts and/or living trusts involving estate planning in the past thirty-six months.

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

**Guardianship of Person/Estate:**

1. Person/Estate of \_\_\_\_\_  
Description \_\_\_\_\_  
Date Concluded \_\_\_\_\_ Court Number \_\_\_\_\_  
County \_\_\_\_\_ Judge \_\_\_\_\_

2. Person/Estate of \_\_\_\_\_  
Description \_\_\_\_\_  
Date Concluded \_\_\_\_\_ Court Number \_\_\_\_\_  
County \_\_\_\_\_ Judge \_\_\_\_\_

3. Person/Estate of \_\_\_\_\_  
Description \_\_\_\_\_  
Date Concluded \_\_\_\_\_ Court Number \_\_\_\_\_  
County \_\_\_\_\_ Judge \_\_\_\_\_

4. Person/Estate of \_\_\_\_\_  
Description \_\_\_\_\_  
Date Concluded \_\_\_\_\_ Court Number \_\_\_\_\_  
County \_\_\_\_\_ Judge \_\_\_\_\_

5. Person/Estate of \_\_\_\_\_  
Description \_\_\_\_\_  
Date Concluded \_\_\_\_\_ Court Number \_\_\_\_\_

County \_\_\_\_\_ Judge \_\_\_\_\_

\_\_\_\_\_ I had full responsibility of all documented matters on this application.

\_\_\_\_\_ I did not have full responsibility of all documented matters on this application.

If you did not, please explain: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

I agree to cooperate with HLRS in facilitating reasonable verification thereof and otherwise in reviewing my qualifications in the categories for which I wish to receive referrals. I have read and am familiar with HLRS Rules of Membership and agree to abide by them. I understand that a 15% forwarding fee is due HLRS on all net fees I receive as a result of referral on this panel.

I declare under penalty of perjury that the foregoing is true and correct.

Executed at \_\_\_\_\_, Texas, on the \_\_\_\_\_ day  
of \_\_\_\_\_, \_\_\_\_\_.

Signature of Applicant : \_\_\_\_\_

You may use a separate sheet of paper to document any additional information that may assist the Experienced Panel Standards Committee determines your level of experience. Additionally, should you need additional space to offer a description on any case, please use a separate sheet of paper.