
Application to Serve on the Probate Mediation Panel
SUPERIOR COURT OF CALIFORNIA
COUNTY OF RIVERSIDE

This form is available on the Court's ADR web page:
www.riverside.courts.ca.gov/adr/adr.htm

**Please return the completed application and
a resume or biography** summarizing your legal education and professional experience to:

(Ms.) Barrie J. Roberts, ADR Director
Superior Court of California
County of Riverside

Mail: 4050 Main Street, 2nd Floor
Riverside, CA 92501

Fax: 951-955-5537

E-mail: CourtADRDiretor@riverside.courts.ca.gov

A. CONTACT INFORMATION

1. Name: _____ CA State Bar No. _____
2. Firm: _____
3. Business address: _____
City: _____ State: _____ Zip: _____
Mailing address (if different): _____
4. E-mail address: _____ Website: _____
5. Telephone numbers:
Daytime: _____ Fax: _____ Cell: _____

B. BAR MEMBERSHIP

- I have been an active member of the California State Bar for at least five (5) years.

Date of admission to the State Bar of California: ____/____/____

I am also admitted to practice law in the states listed below:

State: _____ Date admitted: _____ Bar No: _____ Years of active membership: ____

State: _____ Date admitted: _____ Bar No: _____ Years of active membership: ____

I am in good standing in each state where I am licensed to practice law. Yes No
(If "No", explain in Attachment B1.)

C. MEDIATOR QUALIFICATIONS: Please apply under one of these three categories:

- Civil Mediation Panel (CMP) Member**
Complete C1 or C4 and submit your application.

Alternative Qualifications:

Applicants who do not meet the Minimum Qualifications listed in C1, C2 and C3 may apply under the "Alternative Qualification" standard described in C4.

- Minimum Qualifications:** I meet the minimum qualifications described in C1, C2 and C3:

1. Probate Law Experience:

(a) I have at least five (5) years of Probate Law experience in California; and

(b) I qualify under one of the following:

(i) I am certified as a specialist in Estate Planning, Trust and Probate Law by the State Bar of California Board of Legal Specialization; or

(ii) I have fulfilled the task requirement for Estate Planning, Trust and Probate Law certification (see page 5 for task requirements.) I have fulfilled task numbers: _____.

Your last name: _____

2. Mediation Training: Forty (40) hours of “approved”¹ mediation training required.

- I have completed 40 hours of “Approved Mediation Training” within the past two (2) years; or
- I completed 40 hours of “Approved Mediation Training” two (2) or more years ago and within the past two (2) years I have completed at least six (6) hours of continuing or advanced mediation training, including training in mediation ethics and recent developments in mediation law.

MEDIATION TRAINING: *(You may add pages as Attachment C2.)*

Organization	Course Title	Hours	Dates

3. Mediation Experience:

- Within two (2) years of this application, I have served as a mediator or settlement officer in at least five (5) litigated cases, each with a minimum mediation/settlement conference time of two (2) hours.

List affiliations with dispute resolution providers, including the Riverside County Bar Association Dispute Resolution Service (DRS) and the Desert Bar Association: *(You may add pages as Attachment C3)*

Organization	ADR service you provided (mediation, arbitration, settlement)	Dates of Affiliation

Have you ever been removed by a court as a mediator? Yes No (If yes, describe the circumstances including the court, the date you were removed and the reasons for your removal on Attachment C3.)

4. Alternative Qualification: I have sufficient education, training, skills, and experience to serve on the Panel as follows:

- (1) I have at least ten (10) years of active California Bar membership and Probate Law practice.
- (2) As a neutral, I have conducted a significant number of complex mediations or settlement conferences.

(Describe Alternative Qualifications in Attachment C4).

D. References and/or mediation surveys/evaluations from at least three (3) individuals with personal knowledge of your mediation or settlement skills:

_____ letters of reference and/or mediation surveys/evaluations are attached.
(# of)

You may contact these individuals as references:

Name: _____ Phone #/or e-mail: _____

E. PROFESSIONAL BACKGROUND:

1. Are you licensed in a profession or occupation other than law?

Occupation: _____ Licensing Agency: _____
State: _____ License Number: _____

Describe any additional professional experience other than law that is relevant to your application in Attachment E1.

¹At least 20 hours must be in the form of a single, comprehensive mediation training program. The 40 hours of training must include: Rules of Conduct for court-connected mediation in California; mediation confidentiality and ethics; mediation demonstrations and role-plays.

Your last name: _____

2. The principal portion of my law practice in California is in the following courts (*specify state and federal courts, including trial and appellate courts, if applicable*): _____

3. I currently practice in the following areas of law (*list each subject area of law that occupies at least ten percent of your time*):

4. How many of the following have you completed within the past five years as counsel?
_____ Jury Trials _____ Court Trials _____ Arbitrations
_____ Settlement Conferences _____ Mediations
5. I am certified as a specialist by the State Bar of California Board of Legal Specialization or by an organization whose certification program has been accredited by the State Bar of California. Areas of specialization: (Do not repeat information given in C1.) _____

6. I am certified as a legal specialist by other states or organizations as follows (*specify*): _____

Areas of specialization: _____

7. Do you currently serve as a Temporary Judge for the Riverside County Superior Court? Yes No
(*If yes, you may skip questions E8 - 11*)

8. Have you ever been disciplined by the State Bar of California or by a bar association or other professional licensing entity in any state or by a court of record, including being sanctioned or held in contempt?
 Yes No
9. Do you have any disciplinary action pending against you by the State Bar of California or by a bar association or other professional licensing agency in any state or by a court of record, including any proceeding for the imposition of sanctions or for contempt? Yes No
10. Have you ever been convicted or pleaded no contest to a felony or misdemeanor?
 Yes No
11. Are you a defendant in any pending felony or misdemeanor proceeding?
 Yes No

(*If you answered "yes" to Questions E8, E9, E10 or E11, provide additional information in Attachment E.*)

F. Additional information: Provide any additional information in support of your application in Attachment F.

This application is not complete unless the Waiver and Authorization for Release of Information is signed by the applicant.

WAIVER AND AUTHORIZATION FOR RELEASE OF INFORMATION

I have applied to be appointed as a mediator to the Probate Mediation Panel for the Superior Court of California, County of Riverside.

I hereby authorize the State Bar of California and the attorney-licensing authority in any other state where I am admitted to practice law to release to an authorized representative of the court information regarding the following matters:

(1) whether I am in good standing or am otherwise authorized to practice law as a member of the State Bar of California or as an attorney in any other state where I am admitted to practice law;

(2) whether I have a record of discipline with the State Bar of California or with the licensing authority for attorneys in any other state where I am admitted to practice law; and

(3) whether any disciplinary investigation or proceeding is pending against me by the State Bar of California or by the licensing authority for attorneys in any other state where I am admitted to practice law.

Date:

(TYPE OR PRINT NAME OF APPLICANT)

▶ _____
(SIGNATURE OF APPLICANT)

(CALIFORNIA BAR NUMBER OF APPLICANT)

Task Requirement For Certification

An applicant must demonstrate that, within the five years immediately preceding submission of the written application, he or she has been substantially involved in the practice of estate planning, trust and probate law. A prima facie showing of substantial involvement in the area of estate planning, trust and probate law includes the performance of the following number of tasks in any two of the five categories set forth below (task may be counted in only one category):

- 2.1 Thirty tax planning matters, tax procedures, or tax returns, for at least 20 separate clients. These may include, but not be limited to: tax opinions, memoranda, advice letters; tax-sensitive wills, trusts, or other dispositive instruments; audits or other administrative tax examinations, ruling requests; and estate, gift, fiduciary, or personal income tax returns;
- 2.2 Fifty estate and incapacity plans, at least 20 of which must include tax issues. Portions of a plan may comprise the following: wills, trusts, custodianship, documents of title, beneficiary clauses, property agreements, powers of attorney, advanced health care directives, gifts, powers of appointment, disclaimers, public benefit plans. A single document may not be sufficient to comprise an entire plan. Multiple documents for a client, or for a husband and wife together, comprise a single plan;
- 2.3 Forty administration procedures, for at least 20 separate clients, for estates, trusts (court or non-court), powers of attorney, advanced health care directives, custodianship, conservatorship, guardianships, spousal management procedures, or other procedures under the Probate Code or predecessor provisions;
- 2.4 Completed transfers, by administration or otherwise, of a decedent's assets upon deaths of 40 persons, including tax issues, tax returns or tax basis problems in at least 10 of the completed transfers. These may include, but not be limited to: trust terminations, terminations of joint tenancy, and summary probate procedures, including spousal property petitions; and
- 2.5 Twenty litigated matters or contested hearings, relating to any of the above categories, for at least 10 separate clients. These may include, but not be limited to: will/trust contests, determinations of heirship, objections to accountings, fiduciary appointment/removal, creditors' claims, constructive trusts, family protection proceedings, asset ownership disputes, tax matters, elder abuse.