EDUCATING SENIORS PROJECT

The Trusts & Estates Section of The State Bar of California

**Participating Attorney Application & Agreement**

Name: _____

Firm Name: _____

Address: _____

_____

Phone no: _____ Fax no.: _____

Email: _____ Website: _____

State Bar Number: _____ Date admitted: _____

Over the past three years, the percentage of my practice devoted to decedent estate and trust administration, conservatorships, guardianships, Medi-Cal planning, elder law, and estate planning and taxation, and related litigation is _____%.

If you are certified by the California Board of Legal Specialization as a specialist Estate Planning, Trust and Probate law, please enter the year of your certification: _____

If you are certified by the National Elder Law Foundation as a Certified Elder Law Attorney, please enter the year of your certification: _____

If licensed as an agent by the California Department of Insurance, enter license no. _____

If licensed as a securities agent with SEC, enter license no. and type: _____

If licensed to sell or arrange mortgages or other loans, enter license no. and type: _____

Have any complaints been filed by any such licensing agency which resulted in an investigation or disciplinary action involving your license? _____ If yes, please explain: _____

_____

Please provide contact information for two or more Senior Centers or similar venues where you would like to make presentations:

_____ _____

Name of Senior Center, address, phone contact person

_____ _____

Name of Senior Center, address, phone contact person

**Agreement of Participating Attorney**

I hereby agree and certify as follows:

1. I am a member in good standing of the State Bar of California, and I am now actively engaged in the practice of law. I agree to immediately notify ESP in the event I am suspended or disbarred from the State Bar of California.

2. Over the past three years not less than 30% of my practice has been devoted to decedent estate and trust administration, conservatorships, guardianships, Medi-Cal planning, elder law, estate planning and taxation, and related litigation.

3. I understand and acknowledge that my participation in the Educating Seniors Project (ESP) is for the exclusive purpose of educating seniors in California for the prevention and redress of financial elder abuse.

4. I agree that I will not engage in the sale of annuities, financial products or insurance products in connection with my presentations for ESP, including sales to individuals who may have attended an ESP presentation and thereafter contacted me directly

5. When making presentations for ESP, I agree that I will not solicit business or market my personal law practice. Any request for an attorney referral shall be directed to the State Bar Certified Specialist Search, the State Bar Certified Lawyer Referral Service locator, or other appropriate state and county agencies specific to the senior's need.

6. I further agree to use only the promotional and educational materials provided by ESP.

7. I understand and acknowledge that ESP Speakers are prohibited from obtaining the names, addresses, emails or any other personal information from attendees for the personal or professional use of the Speaker.

8. I understand and agree that I will not use the ESP, the State Bar and/or the Trusts and Estates Section on any promotional materials except as approved by the ESP.

9. I understand and agree that my ESP presentations may be recorded by audio or visual means for the purpose of assuring compliance with the terms of this Agreement.

10. I agree to waive any and all claims that I have against ESP and/or the State Bar of California for any liability or loss arising out of any presentations that I make.

I declare under penalty of perjury, pursuant to the laws of the State of California, that the foregoing is true and correct. Executed on _____ at _____, California.

_____

Signature of Attorney

*Thank you for your commitment to educating seniors and fighting financial elder abuse!*