

Name: \_\_\_\_\_ Telephone: \_\_\_\_\_

Office Address: \_\_\_\_\_  
Zip code

### **EXPERIENCE STATEMENT - INCOME TAX**

Within the last five years I have handled (been personally responsible for) the following matters which demonstrates in my judgment that I meet or exceed the minimum experience qualifications as specified below. (ITEMIZED ONLY THE MINIMUM NUMBER REQUIRED.)

#### **INCOME TAX QUALIFICATIONS**

For preparation of income tax returns, estimated tax returns and application for tax refunds, has prepared and filed at least three (3) federal and state income tax returns for clients.

For all other income tax matters, has rendered a written opinion on a significant tax question in at least three (3) tax cases, or has an LLM in Taxation, or has obtained at least two (2) rulings from the national office of the Internal Revenue Service, or shows that he/she limits his/her practice to tax and tax related matters, or has completed (2) tax proceedings before the Appellate Division of the IRS.

Or is a Certified Specialist, Taxation Law, California Board of Legal Specialization.

Certified Specialist, Taxation Law Date Certified/Recertified \_\_\_\_\_

Identification: If matter is on public record, identify, court or agency and give file number; if office matter only, give office designation but omit client's name.

Date: Give month and year the required experience was completed in the matter.

Federal and State Income tax returns ( identification and date )

First Matter: \_\_\_\_\_ Date: \_\_\_\_\_

Second Matter: \_\_\_\_\_ Date: \_\_\_\_\_

Third Matter: \_\_\_\_\_ Date: \_\_\_\_\_

FOR ALL OTHER INCOME TAX MATTERS:

Written Opinion (identification and date)

First Matter: \_\_\_\_\_ Date: \_\_\_\_\_

Second Matter: \_\_\_\_\_ Date: \_\_\_\_\_

Third Matter: \_\_\_\_\_ Date: \_\_\_\_\_

LLM in Taxation, conferred by ( institution) \_\_\_\_\_

of ( location and street address ) \_\_\_\_\_

\_\_\_\_\_ on ( date ) \_\_\_\_\_

OR

Rulings from National IRS office ( identification and date )

First Ruling: \_\_\_\_\_ Date: \_\_\_\_\_

Second Ruling: \_\_\_\_\_ Date: \_\_\_\_\_

OR

The undersigned hereby represents that he in fact limits his practice of law to tax and tax related matters; that he does not accept or handle matters in other areas of law practice; that he has been so specialized since (month/year) \_\_\_\_\_ and that either of the following persons can confirm this representation of their own knowledge:

Name: \_\_\_\_\_ Telephone #: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_ Telephone #: \_\_\_\_\_

Address: \_\_\_\_\_

Two tax proceedings before the Appellate Division of the IRS: (identification and date )

First Matter: \_\_\_\_\_ Date: \_\_\_\_\_

Second Matter: \_\_\_\_\_ Date: \_\_\_\_\_

I submit the above information in support of my application for panel membership in the Lawyer Referral Service; I agree to cooperate with the Service in facilitating reasonable verification thereof and otherwise reviewing my qualifications for the Income Tax panel under the Rules; and I further declare under penalty of perjury that the foregoing is true and correct in all respects.

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Date

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Signature of Applicant