

In the estate planning area of the law two certifications are available to attorneys:

Few of the licensed attorneys (over 200,000) in California have earned the "**Certified Specialist in Taxation Law**" or "**Certified Specialist in Estate Planning, Trust & Probate Law**" designations from the State Bar of California Board of Legal Specialization.



What does it mean when an attorney is a Certified Specialist in Estate Planning, Trust & Probate Law? (Adapted from the State Bar of California Board of Legal Specialization brochure What Can a Certified Estate Planning, Trust & Probate Law Specialist Do for You?)

A Certified Specialist is more than just an attorney who specializes in a particular area of law. A California attorney who is certified by the State Bar as an Estate Planning, Trust & Probate Law Specialist must have:

- Taken and passed a comprehensive full-day written examination in estate planning, trust, and probate law administered by the State Bar of California Board of Legal Specialization;
- Demonstrated a high level of expertise and requisite number of years of experience in estate planning, trust, and probate law;
- Fulfilled mandated ongoing education requirements in estate planning, trust, and probate law;
- Been favorably evaluated by other attorneys and judges familiar with his estate planning, trust, and probate work.

Why does the State Bar certify legal specialists?

- To help the public identify attorneys who have demonstrated proficiency in specialized fields of law;
- To encourage the maintenance and improvement of attorney competence in specialized fields of law.

What can a certified Estate Planning, Trust & Probate Law Specialist do for you?

- Create and implement your estate plan by preparing wills and trusts;
- Minimize death, gift, and income taxes in connection with your estate plan;
- Plan, organize and implement Family Business Succession
- Design, organize and implement Asset Protection plans
- Assist with probate, trust, conservatorship, Medi-Cal planning and guardianship proceedings and disputes.

Every individual attorney sets his own fees based upon the complexity of each particular case -- a Certified Specialist designation does not at all mean it will cost you more money.

What does it mean when an attorney is a Certified Specialist in Taxation Law?

A Certified Specialist is more than just an attorney who specializes in a particular area of law. A California attorney who is certified by the State Bar as a Taxation Law Specialist must have:

- Generally, have taken and passed a comprehensive full-day written examination in tax law administered by the State Bar of California Board of Legal Specialization or have earned a Master of Laws (LLM) in Taxation;
- Demonstrated a high level of expertise and requisite number of years of experience in taxation law;

- Fulfilled mandated ongoing education requirements in taxation law;
- Been favorably evaluated by other attorneys and judges familiar with his tax law work.

Why does the State Bar certify legal specialists?

- To help the public identify attorneys who have demonstrated proficiency in specialized fields of law;
- To encourage the maintenance and improvement of attorney competence in specialized fields of law.

Taxation law is complex and constantly changing - a Certified Specialist stays current with the law.

What can a certified Taxation Law Specialist do for you?

- Create and implement tax plans;
- Provide written tax opinions;
- Render tax planning advice
- Structure and advise upon the tax aspects of Business, Estates, Real Estate and other matters;
- Minimize death, gift, and income taxes in connection with your Business, Estates, Real Estate and other matters;

Every individual attorney sets his own fees based upon the complexity of each particular case -- a Certified Specialist designation does not at all mean it will cost you more money.