

**North Carolina State Bar Board of Legal Specialization  
Supplemental Materials for Estate Planning and Probate Law Applicants Only**

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

**IV. Substantial Involvement – additional information**

**A. INVOLVEMENT WITH PLANNING:**

1. Approximately how many estate planning clients have you prepared documents for in the last 12 months?

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2. Approximately how many high wealth clients have you prepared estate planning documents for in the last 24 months?

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3. Approximately how many clients have you prepared gift tax returns or provided gift tax advice for during the last 24 months?

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4. Approximately how many clients have you prepared or advised in regard to trusts for disabled beneficiaries in the last 24 months?

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5. Approximately how many clients have you prepared or advised regarding charitable giving in the last 48 months?

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6. Approximately how many clients have you prepared or advised regarding the use of corporate entities or partnership entities in conjunction with estate tax planning in the last 48 months?

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**INVOLVEMENT WITH ADMINISTRATION:**

1. Approximately how many estate administrations have you worked on in the last 12 months?

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2. Approximately how many estate tax returns have you prepared or reviewed for clients in the last 48 months?

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3. Approximately how many gift tax returns have you prepared for clients during the last 48 months?

\_\_\_\_\_

4. Approximately how many estate administration settlements or estate litigation matters have you worked on in the last 36 months?

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C. Additional Information

Please share any additional information regarding your practice that you feel makes you a good candidate for specialization.