

**Eleventh Judicial Circuit of Florida  
Prerequisites for Joining the Specialty Wheel of the**

**PROBATE AND GUARDIANSHIP DIVISION**

Dear Attorney:

Thank you for your interest in joining the Specialty Wheel of the Miami-Dade County Circuit Court, Probate and Guardianship Division. The following application should be completed and returned along with the letters of recommendation to: **Judith A. Frankel, Esquire, 960 Arthur Godfrey Road, Suite 116, Miami Beach, Florida 33140**. We require that **all of the documents** requested be submitted at the same time and that you clearly understand that these are appointments to be made by the Court when the need arises.

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**APPLICATION**

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

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

Telephone No.: \_\_\_\_\_ Fax No.: \_\_\_\_\_

Florida Bar No.: \_\_\_\_\_

Year Admitted To The Florida Bar: \_\_\_\_\_

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**I Minimum Requirements for Eligibility**

All applicants shall be members in good standing with The Florida Bar for two years and a member of the General Wheel of the Probate and Guardianship Division for two years prior to making this application and must submit two letters of recommendations from attorneys practicing in Miami-Dade County who are not members of the same firm as the applicant.

The following statements shall be answered regarding the following specialty categories:

**II Speciality Categories**

**A. Accounting**

1. Requirements

- a. All of the minimum requirements;
- b. 5 years of accounting experience.

2. I certify that I am qualified to handle Accounting matters as they may pertain to Probate or Guardianship issues.

YES \_\_\_\_\_ NO \_\_\_\_\_

**B. Taxation**

1. Requirements
  - a. All of the minimum requirements;
  - b. Board Certified in Wills, Trust & Estates;
  - c. Board Certification in Taxation; or
  - d. LLM in Taxation; or
  - e. Minimum of 5 years of experience handling taxation matters.
2. I certify that I am qualified to handle Taxation matters as they may pertain to Probate or Guardianship issues.  
YES \_\_\_\_\_ NO \_\_\_\_\_

**C. Bankruptcy/Receivership**

1. Requirements
  - a. All of the minimum requirements;
  - b. Member of the Bankruptcy Bar of the Southern District of Florida.
2. I certify that I am qualified to handle Bankruptcy/Receivership matters as they may pertain to Probate or Guardianship issues.  
YES \_\_\_\_\_ NO \_\_\_\_\_

**D. Entitlements (typically pro bono)**

1. Requirements
  - a. All of the minimum requirements;
  - b. Board Certified in Elder Law/Wills, Trust and Estates; or
  - c. Received a minimum of 15 CLE credits in the past 3 years in these areas of law.
2. I certify that I am qualified to handle Entitlement matters as they may pertain to Probate or Guardianship issues.  
YES \_\_\_\_\_ NO \_\_\_\_\_

**E. Blocked Accounts-Cuban Heir**

1. Requirements
  - a. All of the minimum requirements;
  - b. Five (5) years of experience in Probate matters;
  - c. License From the U.S. Dept. of Treasury; or
  - d. Participation in a specialized training and internship program;
  - e. Fluent in Spanish.
2. I certify that I am qualified to handle Blocked Accounts-Cuban Heir matters as they may pertain to Probate or Guardianship issues.  
YES \_\_\_\_\_ NO \_\_\_\_\_

*[Temporarily not placing names on Wheel pending changes in licensing procedures at Department of Treasury.]*

**F. Real Estate**

1. Requirements
  - a. All of the minimum requirements;
  - b. Board Certified in Real Estate;
  - c. Underwriter of 10 Title Insurance Policies; or
  - d. Handled 10 real estate closings.
  
2. I certify that I am qualified to handle real estate matters as they may pertain to Probate or Guardianship issues.  
YES \_\_\_\_\_ NO \_\_\_\_\_

**G. Litigation**

1. **Guardianship**
  - A. Requirements
    1. All of the minimum requirements;
    2. Attorney of record/responsible attorney in at least 5 contested guardianship matters.
  
  - B. I certify that I am qualified to handle guardianship litigation matters as they may pertain to Probate or Guardianship issues.  
YES \_\_\_\_\_ NO \_\_\_\_\_
  
2. **Wills, Trust & Estates**
  - A. Requirements
    1. All of the minimum requirements;
    2. Attorney of record/responsible attorney in at least 5 contested Wills, Trusts or Estate matters.
  
  - B. I certify that I am qualified to handle Wills, Trusts or Estate litigation matters as they may pertain to Probate or Guardianship issues.  
YES \_\_\_\_\_ NO \_\_\_\_\_

**H. Complex Matters**

1. **Guardianship**
  - A. Requirements
    1. All of the minimum requirements;
    2. Attorney of record/responsible attorney in 10 guardianship matters for a period of no less than 2 years in each; or
  
  - B. I certify that I am qualified to handle complex guardianship matters.  
YES \_\_\_\_\_ NO \_\_\_\_\_
  
2. **Wills, Trusts & Estates**
  - A. Requirements
    1. All of the minimum requirements;
    2. Board Certified in Wills, Trusts & Estates; or
    3. Attorney of record for the Personal Representative in at least 10 matters.
  
  - B. I certify that I am qualified to handle complex Wills, Trusts & Estate matters.  
YES \_\_\_\_\_ NO \_\_\_\_\_

I. **Special Needs Trust**

1. Requirements
  - a. All of the minimum requirements;
  - b. Prior to receiving any appointments have completed through execution and if appropriate court approval at least ten Special Needs Trust.
  
2. I certify that I meet the qualifications as set forth to draft Special Needs Trust.  
YES \_\_\_\_\_ NO \_\_\_\_\_

I HEREBY state that the above application and declaration of qualification(s) is/are made in good faith and I further agree that if I am appointed in any matter from this Specialty Wheel and find I am not qualified or do not have the time available necessary for the handling of this matter, I will immediately request that the Court excuse me from the appointment and upon the Court's designation of a new attorney in this matter, I will promptly release my files on the matter.

DATED on this \_\_\_\_\_ day of \_\_\_\_\_, 200\_\_\_\_\_.

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Applicant's Signature

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Applicant's Name in Print