



THE STATE BAR OF CALIFORNIA
Attorney Regulation & Consumer Resources
180 Howard Street · San Francisco, CA 94105-1617
(888) 800-3400 · AttorneyRegulation@calbar.ca.gov

FOR OFFICIAL STATE BAR USE ONLY

Transfer of Estate Planning Documents

1) ATTORNEY INFORMATION

State Bar Number:

Attorney Name:

Status:

Deceased

Retired

Other:

2) DISPOSITION OF RECORDS

I hereby notify the State Bar of California that the above named attorney is no longer practicing law in the field of Estate Planning and has transferred documents to:

Attorney Named Below

OR

Clerk of the Superior Court of the County of the Depositor's last known domicile

Specify County(ies):

Signature:

Date:

E-mail:

Phone:

3) DECLARATION OF RECEIPT

I hereby notify the State Bar of California that I have accepted custody of the Estate Planning documents of the above named attorney. I agree that the State Bar may release this information to the public upon request.

Signature:

Date:

Attorney Name:

State Bar Number:

4) SUBMISSION INFORMATION

Attach List of Depositors (clients who have deposited estate planning with the attorney).

The list must include the client's name and last known address.

FAX TO:

(415) 538-2576

OR

MAIL TO:

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