



# OREGON LEGAL CENTER

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Re: Estate Planning Asset Information

Dear Client:

I want to take the opportunity to thank you again for choosing Oregon Legal Center to help you with your estate planning.

To properly plan your estate we need financial information to help us in determining which plan is best for you. The information requested in this worksheet is necessary to prepare your estate planning documents. This information will be held strictly confidential. Please complete as much information as you can and bring it in or mail or fax it to us before your appointment.



Don't worry if you are unable to complete the form. Just send in as much as you can complete and we will talk about it when we meet.

Thank you for taking the time to provide this information and thank you again for choosing Oregon Legal Center.

Yours truly.

C. Richard Noble,  
Attorney at Law

**Client Information:**

1. **If Married:**

\_\_\_\_\_  
Husband's Name

\_\_\_\_\_  
Husband's Social Security Number

\_\_\_\_\_  
Husband's Birthdate

\_\_\_\_\_  
Wife's Name

\_\_\_\_\_  
Wife's Social Security Number

\_\_\_\_\_  
Wife's Birthdate

2. **If Unmarried:**

\_\_\_\_\_  
Your Name

\_\_\_\_\_  
Your Social Security Number

\_\_\_\_\_  
Your Birthdate

**1. Retirement Accounts (IRA, SEP, 401(k), 403(b), Keogh, TSA, Profit Sharing, Annuities in a retirement plan, etc.: (Attach copy of current statement)**

<u>Company and Address</u>	<u>Name on Acct</u>	<u>Account Number</u>	<u>Value</u>
a. _____ Company Name	_____ Name on Account	_____	\$ _____
_____ Street/Suite			
_____ City/State/Zip	_____ Beneficiary at Death		

<u>Company and Address</u>	<u>Name on Acct</u>	<u>Account Number</u>	<u>Value</u>
b. _____ Company Name	_____ Name on Account	_____	\$ _____
_____ Street/Suite			
_____ City/State/Zip	_____ Beneficiary at Death		

<u>Company and Address</u>	<u>Name on Acct</u>	<u>Account Number</u>	<u>Value</u>
c. _____ Company Name	_____ Name on Account	_____	\$ _____
_____ Street/Suite			
_____ City/State/Zip	_____ Beneficiary at Death		

<u>Company and Address</u>	<u>Name on Acct</u>	<u>Account Number</u>	<u>Value</u>
d. _____ Company Name	_____ Name on Account	_____	\$ _____
_____ Street/Suite			
_____ City/State/Zip	_____ Beneficiary at Death		

<u>Company and Address</u>	<u>Name on Acct</u>	<u>Account Number</u>	<u>Value</u>
e. _____ Company Name	_____ Name on Account	_____	\$ _____
_____ Street/Suite			
_____ City/State/Zip	_____ Beneficiary at Death		

**2. Life Insurance Policies: (Attach copy of policy)**

<u>Company and Address</u>	<u>Owner of Policy</u>	<u>Policy Number</u>	<u>Current Value</u>	<u>Death Benefit</u>	<u>Employer Provided</u>
a. _____ Company Name	_____ Owner	_____	\$ _____	\$ _____	Y/N
_____ Street/Suite					
_____ City/State/Zip	_____ Death Beneficiary				

<u>Company and Address</u>	<u>Owner of Policy</u>	<u>Policy Number</u>	<u>Current Value</u>	<u>Death Benefit</u>	<u>Employer Provided</u>
b. _____ Company Name	_____ Owner	_____	\$ _____	\$ _____	Y/N
_____ Street/Suite					
_____ City/State/Zip	_____ Death Beneficiary				

<u>Company and Address</u>	<u>Owner of Policy</u>	<u>Policy Number</u>	<u>Current Value</u>	<u>Death Benefit</u>	<u>Employer Provided</u>
c. _____ Company Name	_____ Owner	_____	\$ _____	\$ _____	Y/N
_____ Street/Suite					
_____ City/State/Zip	_____ Death Beneficiary				

<u>Company and Address</u>	<u>Owner of Policy</u>	<u>Policy Number</u>	<u>Current Value</u>	<u>Death Benefit</u>	<u>Employer Provided</u>
d. _____ Company Name	_____ Owner	_____	\$ _____	\$ _____	Y/N
_____ Street/Suite					
_____ City/State/Zip	_____ Death Beneficiary				

<u>Company and Address</u>	<u>Owner of Policy</u>	<u>Policy Number</u>	<u>Current Value</u>	<u>Death Benefit</u>	<u>Employer Provided</u>
e. _____ Company Name	_____ Owner	_____	\$ _____	\$ _____	Y/N
_____ Street/Suite					
_____ City/State/Zip	_____ Death Beneficiary				

**3. Real Estate:**

<u>Address</u>	<u>How Titled</u>	<u>Approx. Value</u>	<u>Mortgage Amount</u>
a. _____ Description, ie. residence/rental	_____	\$ _____	\$ _____
_____ Street			
_____ City/State/Zip			

<u>Address</u>	<u>How Titled</u>	<u>Approx. Value</u>	<u>Mortgage Amount</u>
b. _____ Description, ie. residence/rental	_____	\$ _____	\$ _____
_____ Street			
_____ City/State/Zip			

<u>Address</u>	<u>How Titled</u>	<u>Approx. Value</u>	<u>Mortgage Amount</u>
c. _____ Description, ie. residence/rental	_____	\$ _____	\$ _____
_____ Street			
_____ City/State/Zip			

<u>Address</u>	<u>How Titled</u>	<u>Approx. Value</u>	<u>Mortgage Amount</u>
d. _____ Description, ie. residence/rental	_____	\$ _____	\$ _____
_____ Street			
_____ City/State/Zip			

<u>Address</u>	<u>How Titled</u>	<u>Approx. Value</u>	<u>Mortgage Amount</u>
e. _____ Description, ie. residence/rental	_____	\$ _____	\$ _____
_____ Street			
_____ City/State/Zip			

**4. Bank Accounts (checking, savings, and CDs): (Attach copies of current statements)**

<u>Bank and Address</u>	<u>Type of Account</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
a. _____ Bank Name	_____	_____	_____	\$ _____
_____				
_____		_____		
_____		Death Beneficiary		

<u>Bank and Address</u>	<u>Type of Account</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
b. _____ Bank Name	_____	_____	_____	\$ _____
_____				
_____		_____		
_____		Death Beneficiary		

<u>Bank and Address</u>	<u>Type of Account</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
c. _____ Bank Name	_____	_____	_____	\$ _____
_____				
_____		_____		
_____		Death Beneficiary		

<u>Bank and Address</u>	<u>Type of Account</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
d. _____ Bank Name	_____	_____	_____	\$ _____
_____				
_____		_____		
_____		Death Beneficiary		

<u>Bank and Address</u>	<u>Type of Account</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
e. _____ Bank Name	_____	_____	_____	\$ _____
_____				
_____		_____		
_____		Death Beneficiary		

**5. Brokerage Accounts, Mutual Funds, and Money Market Accounts-(Not Retirement Accounts): (Attach copies of current statements)**

<u>Company/Broker</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
a. _____ Broker/Company Name	_____ Owner	_____	\$ _____
_____ Street/Suite			
_____ City/State/Zip	_____ Death Beneficiary		

<u>Company/Broker</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
b. _____ Broker/Company Name	_____ Owner	_____	\$ _____
_____ Street/Suite			
_____ City/State/Zip	_____ Death Beneficiary		

<u>Company/Broker</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
c. _____ Broker/Company Name	_____ Owner	_____	\$ _____
_____ Street/Suite			
_____ City/State/Zip	_____ Death Beneficiary		

<u>Company/Broker</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
d. _____ Broker/Company Name	_____ Owner	_____	\$ _____
_____ Street/Suite			
_____ City/State/Zip	_____ Death Beneficiary		

<u>Company/Broker</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
e. _____ Broker/Company Name	_____ Owner	_____	\$ _____
_____ Street/Suite			
_____ City/State/Zip	_____ Death Beneficiary		

**6. Stocks Held in Certificate Form: (Attach copies of stock certificates)**

<u>Company</u>	<u>Owner(s) of Certificate</u>	<u>Number of Shares</u>	<u>Approx Value</u>
a. _____ Company Name	_____	_____	\$ _____
_____	_____		
_____			
City/State/Zip			

<u>Company</u>	<u>Owner(s) of Certificate</u>	<u>Number of Shares</u>	<u>Approx Value</u>
b. _____ Company Name	_____	_____	\$ _____
_____	_____		
_____			
City/State/Zip			

<u>Company</u>	<u>Owner(s) of Certificate</u>	<u>Number of Shares</u>	<u>Approx Value</u>
c. _____ Company Name	_____	_____	\$ _____
_____	_____		
_____			
City/State/Zip			

<u>Company</u>	<u>Owner(s) of Certificate</u>	<u>Number of Shares</u>	<u>Approx Value</u>
d. _____ Company Name	_____	_____	\$ _____
_____	_____		
_____			
City/State/Zip			

<u>Company</u>	<u>Owner(s) of Certificate</u>	<u>Number of Shares</u>	<u>Approx Value</u>
e. _____ Company Name	_____	_____	\$ _____
_____	_____		
_____			
City/State/Zip			

**7. Annuities (Not Held in a Retirement Account): (Attach copies of current statements)**

<u>Company</u>	<u>Annuitant</u>	<u>Name on Account</u>	<u>Account Number</u>	<u>Approx Value</u>
a. _____ Company Name	_____ Annuitant/Owner	_____	_____	\$ _____
_____ Street/Suite				
_____ City/State/Zip	_____ Death Beneficiary			

<u>Company</u>	<u>Annuitant</u>	<u>Name on Account</u>	<u>Account Number</u>	<u>Approx Value</u>
b. _____ Company Name	_____ Annuitant/Owner	_____	_____	\$ _____
_____ Street/Suite				
_____ City/State/Zip	_____ Death Beneficiary			

<u>Company</u>	<u>Annuitant</u>	<u>Name on Account</u>	<u>Account Number</u>	<u>Approx Value</u>
c. _____ Company Name	_____ Annuitant/Owner	_____	_____	\$ _____
_____ Street/Suite				
_____ City/State/Zip	_____ Death Beneficiary			

<u>Company</u>	<u>Annuitant</u>	<u>Name on Account</u>	<u>Account Number</u>	<u>Approx Value</u>
d. _____ Company Name	_____ Annuitant/Owner	_____	_____	\$ _____
_____ Street/Suite				
_____ City/State/Zip	_____ Death Beneficiary			

<u>Company</u>	<u>Annuitant</u>	<u>Name on Account</u>	<u>Account Number</u>	<u>Approx Value</u>
e. _____ Company Name	_____ Annuitant/Owner	_____	_____	\$ _____
_____ Street/Suite				
_____ City/State/Zip	_____ Death Beneficiary			

**8. Stock Options, Employee Stock Purchase Plans, etc: (Attach copies of current statements)**

<u>Company</u>	<u>Owner</u>	<u>Vested</u>	<u>Unvested</u>	<u>Approx Value</u>
a. _____ Company Name  _____ Street/Suite  _____ City/State/Zip	_____	_____	_____	\$ _____
b. _____ Company Name  _____ Street/Suite  _____ City/State/Zip	_____	_____	_____	\$ _____
c. _____ Company Name  _____ Street/Suite  _____ City/State/Zip	_____	_____	_____	\$ _____
d. _____ Company Name  _____ Street/Suite  _____ City/State/Zip	_____	_____	_____	\$ _____
e. _____ Company Name  _____ Street/Suite  _____ City/State/Zip	_____	_____	_____	\$ _____

**9. Promissory Notes, Real Estate Contracts, and Other Receivables Owed to You: (Attach copies of contracts or notes)**

<u>Buyer/Borrower</u>	<u>Date of Note or Contract</u>	<u>Property Securing Note or Contract</u>	<u>Approx Balance</u>
a. _____ Buyer/Borrower Name	_____	_____	\$ _____
_____		Street Address	
Street/Suite		_____	
_____		City/State/Zip	
City/State/Zip			

<u>Buyer/Borrower</u>	<u>Date of Note or Contract</u>	<u>Property Securing Note or Contract</u>	<u>Approx Balance</u>
b. _____ Buyer/Borrower Name	_____	_____	\$ _____
_____		Street Address	
Street/Suite		_____	
_____		City/State/Zip	
City/State/Zip			

<u>Buyer/Borrower</u>	<u>Date of Note or Contract</u>	<u>Property Securing Note or Contract</u>	<u>Approx Balance</u>
c. _____ Buyer/Borrower Name	_____	_____	\$ _____
_____		Street Address	
Street/Suite		_____	
_____		City/State/Zip	
City/State/Zip			

<u>Buyer/Borrower</u>	<u>Date of Note or Contract</u>	<u>Property Securing Note or Contract</u>	<u>Approx Balance</u>
d. _____ Buyer/Borrower Name	_____	_____	\$ _____
_____		Street Address	
Street/Suite		_____	
_____		City/State/Zip	
City/State/Zip			

<u>Buyer/Borrower</u>	<u>Date of Note or Contract</u>	<u>Property Securing Note or Contract</u>	<u>Approx Balance</u>
e. _____ Buyer/Borrower Name	_____	_____	\$ _____
_____		Street Address	
Street/Suite		_____	
_____		City/State/Zip	
City/State/Zip			

**10. Closely Held Business Interests: (Attach copies of Articles of Incorporation, Bylaws, Buy/Sell Agreements, etc)**

<u>Company</u>	<u>Owner</u>	<u>Shares/Units/ Percentage of Ownership</u>	<u>Approx Value</u>
a. _____ Company Name	_____	_____	\$ _____
_____			
Street/Suite			
_____			
City/State/Zip			

<u>Company</u>	<u>Owner</u>	<u>Shares/Units/ Percentage of Ownership</u>	<u>Approx Value</u>
b. _____ Company Name	_____	_____	\$ _____
_____			
Street/Suite			
_____			
City/State/Zip			

<u>Company</u>	<u>Owner</u>	<u>Shares/Units/ Percentage of Ownership</u>	<u>Approx Value</u>
c. _____ Company Name	_____	_____	\$ _____
_____			
Street/Suite			
_____			
City/State/Zip			

<u>Company</u>	<u>Owner</u>	<u>Shares/Units/ Percentage of Ownership</u>	<u>Approx Value</u>
d. _____ Company Name	_____	_____	\$ _____
_____			
Street/Suite			
_____			
City/State/Zip			