



# OREGON LEGAL CENTER

---

C. Richard Noble, P.C., Attorney at Law  
2875 Marylhurst Dr., West Linn, Oregon 97068

(503) 635-6235 or toll free (866) 635-6235  
Fax: (503) 635-6668  
Info@oregonlegalcenter.com

Re: Estate Planning 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.

Please take the time to fill out the attached form which deals with information we need to prepare your estate planning documents. If you have any questions please call me and I can help you fill the form out. Sometimes that is the easier way to get the job done.

When you complete the form please drop it by the office or stick it in the mail or fax machine. I am looking forward to our appointment.

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

## ESTATE PLANNING INFORMATION – MARRIED COUPLE

### 1. General Information

Today's Date: \_\_\_\_\_

Husband's Full Name: \_\_\_\_\_

Wife's Full Name: \_\_\_\_\_

Residence County, i.e., Clackamas: \_\_\_\_\_

Residence Street Address: \_\_\_\_\_

Residence City/State/Zip: \_\_\_\_\_

Best Phone Number: \_\_\_\_\_

Best Email: \_\_\_\_\_

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

Husband's Social Sec No: \_\_\_\_\_

Husband a US Citizen? \_\_\_\_\_

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

Wife's Social Security No: \_\_\_\_\_

Wife a US Citizen? \_\_\_\_\_

Date and Place of Marriage: \_\_\_\_\_

Check if you have any of the following documents? If so please provide copies:

- Will
- Revocable Living Trust
- Other Trust Agreements
- Durable Power of Attorney
- Pre-Nuptial or Post-Nuptial Agreement
- Divorce Decree
- Advance Health Care Directive
- Any other estate planning documents

## 2. Information Concerning Children

Check One:

- We do not have any children.
- All of our children are from this marriage or adopted by us.
- One or both of us have children from a previous marriage.

Does Husband have any deceased children (check one)?

- None
- \_\_\_\_ (indicate how many)

Does Wife have any deceased children (check one)?

- None
- \_\_\_\_ (indicate how many)

Living Children:

<u>Child's Name</u>	<u>Child's Birth Date</u>	<u>Whose Child?</u>
1. _____ Child's Name	_____	Child of: <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Both
<u>Child's Name</u>	<u>Child's Birth Date</u>	<u>Whose Child?</u>
2. _____ Child's Name	_____	Child of: <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Both
<u>Child's Name</u>	<u>Child's Birth Date</u>	<u>Whose Child?</u>
3. _____ Child's Name	_____	Child of: <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Both

<u>Child's Name</u>	<u>Child's Birth Date</u>	<u>Whose Child?</u>
4. _____ Child's Name	_____	Child of: <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Both

<u>Child's Name</u>	<u>Child's Birth Date</u>	<u>Whose Child?</u>
5. _____ Child's Name	_____	Child of: <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Both

<u>Child's Name</u>	<u>Child's Birth Date</u>	<u>Whose Child?</u>
6. _____ Child's Name	_____	Child of: <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Both

<u>Child's Name</u>	<u>Child's Birth Date</u>	<u>Whose Child?</u>
7. _____ Child's Name	_____	Child of: <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Both

<u>Child's Name</u>	<u>Child's Birth Date</u>	<u>Whose Child?</u>
8. _____ Child's Name	_____	Child of: <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Both

**3. Husband's Disposition of Property**

**a. Husband's Specific Bequests (such as jewelry, personal or household goods, cash gifts, etc.)**

**Scenario One: Wife is alive at husband's death:**

<u>Description of Item</u>	<u>Location</u>	<u>Beneficiary</u>
a. All personal property	_____	All personal property to Wife
b. _____	_____	_____
c. _____	_____	_____
d. _____	_____	_____

**Scenario Two: Wife is not alive at husband's death:**

<u>Description of Item</u>	<u>Location</u>	<u>Beneficiary</u>
a. _____	_____	_____
b. _____	_____	_____
c. _____	_____	_____
d. _____	_____	_____

**b. Husband's Residue (Assets remaining after Specific Bequests)**

**Scenario One: Wife is alive at husband's death:**

<u>Share of Estate</u>	<u>Beneficiary</u>	<u>Alternate Beneficiary (in event first beneficiary dies before you)</u>
a. All remaining property	All remaining property to Wife	_____
b. _____	_____	_____
c. _____	_____	_____
d. _____	_____	_____

**Scenario Two: Wife is not alive at husband's death:**

<u>Share of Estate</u>	<u>Beneficiary</u>	<u>Alternate Beneficiary (in event first beneficiary dies before you)</u>
a. _____	_____	_____
b. _____	_____	_____
c. _____	_____	_____
d. _____	_____	_____
e. _____	_____	_____
f. _____	_____	_____
g. _____	_____	_____
h. _____	_____	_____

**4. Wife's Disposition of Property**

**a. Wife's Specific Bequests (such as jewelry, personal or household goods, cash gifts, etc.)**

**Scenario One: Husband is alive at wife's death:**

<u>Description of Item</u>	<u>Location</u>	<u>Beneficiary</u>
a. All personal property	All personal property to Husband	_____
b. _____	_____	_____
c. _____	_____	_____
d. _____	_____	_____

**Scenario Two: Husband is not alive at wife's death:**

<u>Description of Item</u>	<u>Location</u>	<u>Beneficiary</u>
a. _____	_____	_____
b. _____	_____	_____
c. _____	_____	_____
d. _____	_____	_____

**b. Wife's Residue (Assets remaining after Specific Bequests)**

**Scenario One: Husband is alive at wife's death:**

<u>Share of Estate</u>	<u>Beneficiary</u>	<u>Alternate Beneficiary (in event first beneficiary dies before you)</u>
a. All remaining property	_____	All remaining property to Husband
b. _____	_____	_____
c. _____	_____	_____
d. _____	_____	_____

**Scenario Two: Husband is not alive at wife's death:**

<u>Share of Estate</u>	<u>Beneficiary</u>	<u>Alternate Beneficiary (in event first beneficiary dies before you)</u>
a. _____	_____	_____
b. _____	_____	_____
c. _____	_____	_____
d. _____	_____	_____
e. _____	_____	_____
f. _____	_____	_____
g. _____	_____	_____
h. _____	_____	_____

**6. Trusts For Minor or Incapacitated Beneficiaries. – Please list the beneficiaries whose share of your estate will be retained in trust until they attain the age or other conditions stated below.**

**Name of Beneficiary**

**Conditions and/or Age**

a. \_\_\_\_\_  
Beneficiary's Name

\_\_\_\_\_   
Conditions and/or Age

b. \_\_\_\_\_  
Beneficiary's Name

\_\_\_\_\_   
Conditions and/or Age

c. \_\_\_\_\_  
Beneficiary's Name

\_\_\_\_\_   
Conditions and/or Ages

d. \_\_\_\_\_  
Beneficiary's Name

\_\_\_\_\_   
Conditions and/or Ages

e. \_\_\_\_\_  
Beneficiary's Name

\_\_\_\_\_   
Conditions and/or Ages

**7. Fiduciaries (People who will act for you if you are deceased or disabled):**

**Husband's Fiduciaries:**

	<u>Personal Representative</u>	<u>Trustee</u>	<u>Guardian of Minor Children</u>	<u>Attorney-in-Fact under Power of Attorney</u>
First Choice	Wife	Wife	_____	Wife
Alternate	_____	_____	_____	_____
Second Alternate	_____	_____	_____	_____

A personal representative and a trustee distribute your assets after your death. A guardian will be necessary if you have minor children and you and your spouse die before your children turn 18. Your trustee will also handle the financial affairs of your children. An attorney in fact will handle your affairs if you were to become incompetent or disabled. An OLC attorney can answer your questions about who should hold these positions.

**Wife's Fiduciaries:**

	<u>Personal Representative</u>	<u>Trustee</u>	<u>Guardian of Minor Children</u>	<u>Attorney-in-Fact under Power of Attorney</u>
First Choice	Husband	Husband	_____	Husband
Alternate	_____	_____	_____	_____
Second Alternate	_____	_____	_____	_____

A personal representative and a trustee distribute your assets after your death. A guardian will be necessary if you have minor children and you and your spouse die before your children turn 18. Your trustee will also handle the financial affairs of your children. An attorney in fact will handle your affairs if you were to become incompetent or disabled. An OLC attorney can answer your questions about who should hold these positions.

