



OREGON LEGAL CENTER

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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 – SINGLE INDIVIDUAL

1. General Information

Today's Date: _____

Your Full Name: _____

Residence County, i.e., Clackamas: _____

Residence Street Address: _____

Residence City/State/Zip: _____

Best Phone Number: _____

Best Email: _____

Your Birthdate: _____

Your Social Sec No: _____

Are You a US Citizen? _____

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

Do you have any children?

Check One:

- None
- ____ (indicate how many)

Do you have any deceased children (check one)?

- None
- ____ (indicate how many)

Living Children:

<u>Child's Name</u>	<u>Child's Birth Date</u>
1. _____ Child's Name	_____
<u>Child's Name</u>	<u>Child's Birth Date</u>
2. _____ Child's Name	_____
<u>Child's Name</u>	<u>Child's Birth Date</u>
3. _____ Child's Name	_____
<u>Child's Name</u>	<u>Child's Birth Date</u>
4. _____ Child's Name	_____
<u>Child's Name</u>	<u>Child's Birth Date</u>
5. _____ Child's Name	_____
<u>Child's Name</u>	<u>Child's Birth Date</u>
6. _____ Child's Name	_____

3. Disposition of Property

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

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

b. Residue (Assets remaining after Specific Bequests)

<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. _____	_____	_____

4. 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.

<u>Name of Beneficiary</u>	<u>Conditions and/or Age</u>
a. _____ Beneficiary's Name	_____
b. _____ Beneficiary's Name	_____
c. _____ Beneficiary's Name	_____
d. _____ Beneficiary's Name	_____
e. _____ Beneficiary's Name	_____

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

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