

Names and birthdates of children born of this marriage or adopted:

Child 1 Name: _____

Child 1 Birthdate: _____

Child 2 Name: _____

Child 2 Birthdate: _____

Child 3 Name: _____

Child 3 Birthdate: _____

Child 4 Name: _____

Child 4 Birthdate: _____

Child 5 Name: _____

Child 5 Birthdate: _____

Child 6 Name: _____

Child 6 Birthdate: _____

Deceased Children:

Does husband have any deceased children? _____
Yes No

Does wife have any deceased children? _____
Yes No

If husband has any children not born of this marriage please provide the names and birthdates. Otherwise, skip this section.

Child 1 Name: _____

Child 1 Birthdate: _____

Child 2 Name: _____

Child 2 Birthdate: _____

Child 3 Name: _____

Child 3 Birthdate: _____

Child 4 Name: _____

Child 4 Birthdate: _____

If wife has any children not born of this marriage please provide the names and birthdates. Otherwise, skip this section.

Child 1 Name: _____

Child 1 Birthdate: _____

Child 2 Name: _____

Child 2 Birthdate: _____

Child 3 Name: _____

Child 3 Birthdate: _____

Child 4 Name: _____

Child 4 Birthdate: _____

Representatives: You need to select a Personal Representative, a Successor Trustee for the Living Trust, a Guardian (if there are children under 18), and a Trustee who would be the Trustee of the Childrens' Trust for children under 25. You don't have to have separate people for each job, i.e., the same person could be the Personal Representative, the Successor Trustee, the Guardian, and the Trustee of the Childrens' Trust. You also need alternates for each job.

Personal Representative:

After the second spouse dies, who is going to be in charge of winding up the estate (Personal Representative)? _____

Who would be an alternate Personal Representative? _____

Successor Trustee after both spouses have died:

Successor Trustee? _____

Alternate Successor Trustee? _____

Guardian:

If there are any children under age 18, who is going to be nominated as the Guardian? _____

Who would be an alternate Guardian? _____

Trustee of Trust for Children:

If there are children under age 25, who is going to be the Trustee of the children's trust? _____

Who would serve as the Alternate Trustee? _____

Specific Gifts:

After the second spouse dies, will any gifts be made to any specific people or institutions such as church or charity? _____ _____
Yes No

If so, who will get the specific gifts?

Specific Gift Beneficiary 1: _____

Specific Gift 1: \$_____

Specific Gift Beneficiary 2: _____

Specific Gift 2: \$_____

Specific Gift Beneficiary 3: _____

Specific Gift 3: \$_____

Who gets the personal property such as household goods, jewelry, photographs, collections, etc.? Generally this would be equal to children or equal to a group of people. If you have specific items you wish to leave to specific people, there will be another document where you can write that in at the signing ceremony.

Is personal property going equally to the children? _____
Yes No

Or Is it going to go equally to certain individuals _____
Yes No

If equally to individuals provide the following information:

Personal Property Beneficiary 1: _____

Personal Property Beneficiary 2: _____

Personal Property Beneficiary 3: _____

Personal Property Beneficiary 4: _____

Personal Property Beneficiary 5: _____

Personal Property Beneficiary 6: _____

After the specific gifts, if any are, made and after the personal property is distributed, who will get the rest of the Estate (the residue):

Is it going to go equally to the children? _____
Yes No

Or is it going to go by percentage
to certain individuals
or institutions? _____
Yes No

If by percentage to individuals provide the following information:

Percentage Beneficiary 1: _____

Percent to Beneficiary 1: _____%

Percentage Beneficiary 2: _____

Percent to Beneficiary 2: _____%

Percentage Beneficiary 3: _____

Percent to Beneficiary 3: _____%

Percentage Beneficiary 4: _____

Percent to Beneficiary 4: _____%

Percentage Beneficiary 5: _____

Percent to Beneficiary 5: _____%

Percentage Beneficiary 6: _____

Percent to Beneficiary 6: _____%

Financial Information for _____

Real Estate

Do the husband and wife own any real estate jointly , i.e., as husband and wife, and if so, how many pieces do they own?	_____ Yes/No	_____ How Many?/Type Number
Does the husband own any real estate individually , and if so, how many pieces does he own?	_____ Yes/No	_____ How Many?/Type Number
Does the wife own any real estate individually , and if so, how many pieces does she own?	_____ Yes/No	_____ How Many?/Type Number

Timeshares

Do the husband and wife own any timeshares , jointly , i.e., as husband and wife, and if so, how many timeshares do they own?	_____ Yes/No	_____ How Many?/Type Number
Does the husband own any timeshares individually , and if so, how many pieces does he own?	_____ Yes/No	_____ How Many?/Type Number
Does the wife own any timeshares, and if so, how many pieces does she own?	_____ Yes/No	_____ How Many?/Type Number

Safety Deposit Box

Do the husband and wife rent any safety deposit boxes, jointly , i.e., as husband and wife, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the husband rent any safety deposit boxes individually , and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the wife rent any safety deposit boxes individually , and if so, how many?	_____ Yes/No	_____ How Many?/Type Number

Bank Accounts, Joint Brokerage Accounts and CD's Transferred to the Trust (Not IRAs)

Do the husband and wife own any bank accounts, brokerage accounts (not IRAs) and/or certificates of	_____ Yes/No	_____ How
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deposit , jointly , i.e., as husband and wife, and if so, how many accounts and certificates of deposit do they own?	_____	Many?/Type Number
Does the husband own any bank accounts, brokerage accounts (not IRAs) and/or certificates of deposit individually , and if so, how many accounts and CDs does he own?	Yes/No _____	How Many?/Type Number _____
Does the wife own any bank accounts, brokerage accounts (not IRAs) and/or certificates of deposit individually , and if so, how many accounts and CDs does she own?	Yes/No _____	How Many?/Type Number _____

Stock Held in Certificate Form

Do the husband and wife own any stock held in certificate form, , jointly , i.e., as husband and wife, and if so, in how many different companies?	Yes/No _____	How Many?/Type Number _____
Does the husband own any stock held in certificate form individually , and if so, in how many different companies?	Yes/No _____	How Many?/Type Number _____
Does the wife own any bank accounts, brokerage accounts (not IRAs) and/or certificates of deposit individually , and if so, how many accounts and CDs does she own?	Yes/No _____	How Many?/Type Number _____

Vehicles: Autos, Trucks, Motor Homes

Do the husband and wife own any vehicles including autos, trucks, and/or motor homes, , jointly , i.e., as husband and wife, and if so, how many?	Yes/No _____	How Many?/Type Number _____
Does the husband own any vehicles including autos, trucks, and/or motor homes individually , and if so, how many?	Yes/No _____	How Many?/Type Number _____
Does the wife own any vehicles including autos, trucks, and/or motor homes individually , and if so, how many does she own?	Yes/No _____	How Many?/Type Number _____

Mobile Homes

Do the husband and wife own any mobile homes, , jointly , i.e., as husband and wife, and if so, how many?	Yes/No _____	How Many?/Type Number _____
Does the husband own any mobile homes individually , and if so, how many?	Yes/No _____	How Many?/Type Number _____
Does the wife own any mobile homes individually , and	_____	_____

if so, how many does she own?	Yes/No	How Many?/Type Number
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Titled Boats

Do the husband and wife own any titled boats, , jointly , i.e., as husband and wife, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the husband own any titled boats individually , and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the wife own any titled boats individually , and if so, how many does she own?	_____ Yes/No	_____ How Many?/Type Number

Airplanes

Do the husband and wife own any airplanes, jointly , i.e., as husband and wife, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the husband own any airplanes individually , and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the wife own any airplanes individually , and if so, how many does she own?	_____ Yes/No	_____ How Many?/Type Number

Annuities (Not IRAs)

Do the husband and wife own any annuities (not IRAs), jointly , i.e., as husband and wife, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the husband own any annuities (not IRAs) individually , and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the wife own any annuities (not IRAs) individually , and if so, how many does she own?	_____ Yes/No	_____ How Many?/Type Number

Stock Options

Do the husband and wife own any stock options (not IRAs), jointly , i.e., as husband and wife, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Does the husband own any options individually , and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the wife own any stock options individually , and if so, how many does she own?	_____ Yes/No	_____ How Many?/Type Number

Promissory Notes and/or other Receivables

Do the husband and wife own any promissory notes and/or other receivables jointly , i.e., as husband and wife, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the husband own any promissory notes and/or other receivables individually , and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the wife own any promissory notes and/or other receivables individually , and if so, how many does she own?	_____ Yes/No	_____ How Many?/Type Number

Closely Held Businesses

Do the husband and wife own any closely held businesses jointly , i.e., as husband and wife, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the husband own any closely held businesses individually , and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the wife own any closely held businesses individually , and if so, how many does she own?	_____ Yes/No	_____ How Many?/Type Number

Life Insurance Policies

Do the husband and wife own any life insurance policies jointly , i.e., as husband and wife, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the husband own any life insurance policies individually , and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the wife own any life insurance policies individually , and if so, how many does she own?	_____ Yes/No	_____ How Many?/Type Number

Retirement Accounts (IRA, SEP, 401k, 403(b), Keogh, TSA, Profit Sharing, Annuities in a Retirement Plan, etc.

Does the <u>husband</u> own any Retirement Accounts (IRA, SEP, 401k, 403(b), Keogh, TSA, Profit Sharing, Annuities in a Retirement Plan, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
Does the <u>wife</u> own any Retirement Accounts (IRA, SEP, 401k, 403(b), Keogh, TSA, Profit Sharing, Annuities in a Retirement Plan, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number

Thank you for completing this form. Please return it to Oregon Legal Center either as an email attachment to richardnoble@richardnoble.com or by mailing it to Oregon Legal Center at 2875 Marylhurst Dr., West Linn, OR 97068. If you have any questions you can call Richard Noble at 503 635-6235