

Information for _____:

First name: _____

Middle Name or Initial: _____

Last Name: _____

Social Security Number: _____

Birthdate: _____

U.S. Citizen? _____
Yes No

Residence Street Address: _____

Residence City, State, Zip: _____

Best phone number: _____

Best email address: _____

Have you been married before: _____
Yes No

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 you have any deceased children?

 Yes

 No

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:

Who is going to be in charge of winding up the estate (Personal Representative)?

Who would be an alternate Personal Representative? _____

Successor Trustee:

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:

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: _____

Percent to Beneficiary 6: _____%

Initial Funding Information for _____

Real Estate

Do you own any real estate, and if so, how many pieces.?	_____ Yes/No	_____ How Many?/Type Number
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Timeshares

Do you own any timeshares, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Safety Deposit Box

Do you rent any safety deposit boxes, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Bank Accounts, Joint Brokerage Accounts and CD's Transferred to the Trust (Not IRAs)

Do you own any bank accounts, brokerage accounts (not IRAs) and/or certificates of deposit, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Stock Held in Certificate Form

Do you own any stock held in certificate form, and if so, in how many different companies?	_____ Yes/No	_____ How Many?/Type Number
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Vehicles: Autos, Trucks, Motor Homes

Do you own any vehicles including autos, trucks, and/or motor homes , and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Mobile Homes

Do you own any mobile homes, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Titled Boats

Do you own any titled boats, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Airplanes

Do you own any airplanes, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Annuities (Not IRAs)

Do you own any annuities (not IRAs), and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Stock Options

Do you own any options, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Promissory Notes and/or other Receivables

Do you own any promissory notes and/or other receivables, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Closely Held Businesses

Do you own any closely held businesses, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Life Insurance Policies

Do you own any life insurance policies, and if so, how many?	_____ Yes/No	_____ How Many?/Type Number
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Retirement Accounts (IRA, SEP, 401k, 403(b), Keogh, TSA, Profit Sharing, Annuities in a Retirement Plan, etc.

Do you 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
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Thank you for completing this form. Please return it to Oregon Legal Center either as an email attachment to tomnoble@oregonlegalcenter.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 or Tom Noble at 503 863-0536