

Instructions:

- Please legibly fill in the requested information.
- If you are unsure of a question, simply leave the answer blank.
- Please list **all** heirs and devisees, even if they are now deceased.

DECEDENT'S INFORMATION

Full name: _____

Birth date: _____ Date of Death: _____ Age at Death: _____

SSN: _____ (please format dates as mm/dd/yyyy)

Residence address: _____

City: _____ State: _____ Zip code: _____

Place of Death: _____

County: _____ (for example: Portland, Multnomah County, Oregon)

Decedent had a Will? Yes No

(If the Decedent did have a Will, please provide our office a copy)

Was Decedent on Medicaid? Yes No

How are you related to the Decedent? _____

Please tell us about the Decedent.

Please let us know of any special concerns you may have regarding the Decedent's estate.

YOUR INFORMATION (PROPOSED PERSONAL REPRESENTATIVE)

Full name: _____

Birth date: _____ SSN: _____ (needed to obtain estate tax ID #)

Street address: _____

City: _____ State: _____ Zip code: _____

Mailing address: _____

(if different than your street address)

City: _____ State: _____ Zip code: _____

Home phone: _____ Cell phone: _____

Can we leave confidential messages at the above phone numbers?

Yes No

Email: _____

Have you been convicted of any Felony? Yes No

Have you been convicted of any Misdemeanor? Yes No

Why am I being asked these questions?

If probate is needed, Oregon Statute requires that we must inform the court that you are not disqualified from serving as Personal Representative.

What is a bond? Will I need to be bonded?

Sometimes the Probate Court requires that the Personal Representative be bonded. A Bond is essentially an insurance policy that ensures the wishes of the Decedent are carried out ethically and honestly. In cases of fraud, the Bond will reimburse those affected, including heirs of the estate or creditors of the estate. If the Decedent left a Will, the Will may waive the requirement of bond.

Are you a US Citizen? Yes No

Did the Decedent own or operate a business that you intend to continue as fiduciary? Yes No

Are you indebted to the Decedent? Yes No

To the best of your knowledge, is the estate insolvent? Yes No

Are there any disputes among the heirs that you are aware of? Yes No

Have you ever filed for bankruptcy? If so, which year: _____ Yes No

DECEDENT’S HEIRS

(Children either born or adopted; include descendants of any deceased child of the decedent)

NAME AND PHONE NUMBER	RELATIONSHIP TO DECEDENT	MAILING ADDRESS

DECEDENT’S DEVISEES

(If decedent did not have a Will, this section does not apply. List beneficiaries named in a Will – they may be identical to heirs listed above)

NAME AND PHONE NUMBER	RELATIONSHIP TO DECEDENT	MAILING ADDRESS

DECEDENT’S ASSETS SUBJECT TO PROBATE IN OREGON:

(If you don’t have an exact value, an estimate is fine; assets subject to probate are those that list the decedent as owner or co-owner)

Bank Accounts	
BANK NAME AND ACCOUNT NUMBER	VALUE AS OF DATE OF DEATH

Investment Accounts	
INVESTMENT FIRM AND ACCOUNT NUMBER	VALUE AS OF DATE OF DEATH

Real Property	
ADDRESS	VALUE AS OF DATE OF DEATH

Vehicles	
MAKE, MODEL, AND YEAR	VALUE AS OF DATE OF DEATH

Miscellaneous	
DESCRIPTION OF ASSET	VALUE AS OF DATE OF DEATH

Personal Property	
	VALUE AS OF DATE OF DEATH

DECEDENT'S DEBTS OR KNOWN CREDITORS:

(A debt may be a mortgage, credit card account, loan, etc.; a creditor is a person or company who is owed money)

CREDITOR NAME AND ADDRESS	ACCOUNT NUMBER	AMOUNT OWED (\$)

Please send us originals of the following documents (if available):

- Death Certificate
- Last Will and Testament (if decedent had one) with Witness Affidavit

Please send us copies of the following documents (if available):

- Investment/Financial Statements (from date of death through today)
- Utility Statements (electric, gas, water, etc.)
- Loan and Creditor Statements (from date of death through today)
- Deeds to real property