

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:		eath: _		Age at Death:
SSN:		(please format dates as mm/dd/yyyy)			
Residence address:					
City:					Zip code:
Place of Death:					
County:					rtland, Multnomah County, Oregon)
Decedent had a Trust?	□ Yes		No		Death Certificates Please order five (5) originals. Bring one short-form and one long-form death certificate to your initial appointment.
Decedent had a Will?	\Box Yes	_			
Was the Decedent married?	□ Yes		No	Is the sp	oouse still alive? □ Yes □ No
How are you related to the Dec	cedent?				
Please tell us about the Decede	ent				
Please let us know of any spec	ial concern	ıs you m	ay hav	e regarding	the Decedent's estate.



YOUR INFORMATION (SUCCESSOR TRUSTEE)

Full name:				
Birth date:	SSN:		(neede	ed to obtain estate tax ID #)
Street address:				
City:		_ State:	Zip	code:
Mailing address:				
	your street address)	_		
City:		_ State:	Zip	code:
Home phone:		Cell phone:		
Can we lea	ve confidential messa Yes	ges at the above p □ No	phone numbers	?
Email:				
Have you been convicted of a	ny Felony? □	Yes □ No	Why am I being	g asked these questions?
Have you been convicted of a	ny Misdemeanor?	Yes No	requires that we	needed, Oregon Statute must inform the court that qualified from serving as entative.
Are you a US Citizen?			☐ Yes	\square No
Did the Decedent own or ope continue as fiduciary?	erate a business that y	ou intend to	☐ Yes	\square No
Are you indebted to the Dece	edent?		☐ Yes	\square No
To the best of your knowled	ge, is the estate insolv	ent?	☐ Yes	\square No
Are there any disputes amon	g the heirs that you ar	e aware of?	☐ Yes	\square No
Have you ever filed for bank	- · · · ·		☐ Yes	\square No



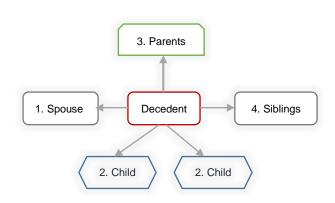
DECEDENT'S HEIRS

(Heirs include a spouse and children either born or adopted; include descendants of any deceased child of the decedent)

NAME AND PHONE NUMBER	RELATIONSHIP TO DECEDENT	MAILING ADDRESS

The heirs at law of the decedent are determined by intestacy laws. This chart displays the first four tiers of how a person's estate would flow through intestate succession.

- 1. Surviving spouse; if none, then...
- 2. Children, including issue of Predeceased children (if any); if none, then...
- 3. Mom and dad; if they are not living, then...
- 4. Siblings.





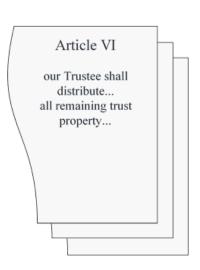
DECEDENT'S PRIMARY BENEFICIARIES

(Those who will receive a gift or inheritance under the decedent's Trust)

NAME AND PHONE NUMBER	RELATIONSHIP TO DECEDENT	MAILING ADDRESS

Please review the decedent's Trust document and locate any provisions that give, bequeath, devise or distribute assets, money, belongings, or property to an individual or entity.

Any individual or entity receiving anything from decedent's estate is a Primary Beneficiary.





DECEDENT'S SECONDARY BENEFICIARIES

(Those who would receive a gift or inheritance under the decedent's Trust if a Primary Beneficiary is deceased. The Secondary Beneficiaries are often referred to be "second in line" to receive a gift or inheritance from the Trust)

NAME AND PHONE NUMBER	RELATIONSHIP TO DECEDENT	MAILING ADDRESS

A Secondary Beneficiary will inherit assets only if certain conditions are met, such as the death of the primary beneficiary or the primary beneficiary's decision to disown or disclaim the assets to which they are entitled.

A Secondary Beneficiary is also considered to be a contingent beneficiary.

Article VI

our Trustee shall
distribute...
all remaining trust
property...

COLLIER LAW 1020 Liberty Street SE Salem, OR 97 Telephone: (503) 485-7224 Fax: (503) 967-1155



TRUST ASSETS

(If you don't have an exact value, an estimate is fine)

	Bank Accounts
BANK NAME AND ACCOUNT NUMBER	VALUE AS OF DATE OF DEATH
	Investment Accounts
Y	
INVESTMENT FIRM AND ACCOUNT NUMBER	VALUE AS OF DATE OF DEATH
	Real Property
Address	VALUE AS OF DATE OF DEATH
TID NESS	VIED IN OF BIND OF BEIN
	Vehicles
Make, Model, and Year	VALUE AS OF DATE OF DEATH
	Minallana
	Miscellaneous
DESCRIPTION OF ASSET	VALUE AS OF DATE OF DEATH
	n in
	Personal Property
	VALUE AS OF DATE OF DEATH



ASSETS HELD OUTSIDE OF THE TRUST

(Any assets held by the decedent under his or her individual name)

ASSET	TITLED As / OWNED BY	VALUE (\$)

For example: California Home Titled as: Value: 1234 Main Street John Doe \$500,000.00

Roseville, CA 00000

Any assets not properly transferred from the decedent to his or her Trust must pass through probate to place them into the Trust. The assets will then be distributed according to the instructions of the Trust.



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
- Trust

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

Note: Using this form does not constitute or create an attorney-client relationship. We welcome the opportunity to review this information and consider providing legal counsel to you.

This form may be provided to the trust's CPA at a future date.