

**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)*

**Death Certificates**

Please order five (5) originals. Bring one short-form and one long-form death certificate to your initial appointment.

Decedent had a Trust?  Yes  No

Decedent had a Will?  Yes  No

Was the Decedent married?  Yes  No Is the spouse still alive?  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 (SUCCESSOR TRUSTEE)**

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.

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







**TRUST ASSETS**

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

<b>Bank Accounts</b>	
BANK NAME AND ACCOUNT NUMBER	VALUE AS OF DATE OF DEATH

<b>Investment Accounts</b>	
INVESTMENT FIRM AND ACCOUNT NUMBER	VALUE AS OF DATE OF DEATH

<b>Real Property</b>	
ADDRESS	VALUE AS OF DATE OF DEATH

<b>Vehicles</b>	
MAKE, MODEL, AND YEAR	VALUE AS OF DATE OF DEATH

<b>Miscellaneous</b>	
DESCRIPTION OF ASSET	VALUE AS OF DATE OF DEATH

<b>Personal Property</b>	
	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*  
*1234 Main Street*  
*Roseville, CA 00000*

*Titled as:*  
*John Doe*

*Value:*  
*\$500,000.00*

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.

