

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 Certificate

Please order five 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?

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

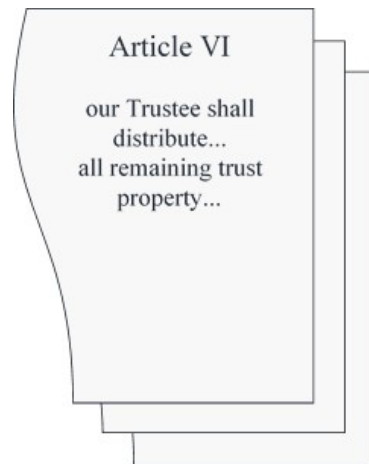
DECEDENT’S PRIMARY BENEFICIARIES

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

FULL NAME	RELATIONSHIP TO DECEDENT	MAILING ADDRESS, EMAIL ADDRESS, AND PHONE NUMBER	DATE OF BIRTH IF A MINOR

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)

FULL NAME	RELATIONSHIP TO DECEDENT	MAILING ADDRESS, EMAIL ADDRESS, AND PHONE NUMBER	DATE OF BIRTH IF A MINOR

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...

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	
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

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.