

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 NoDid the Decedent own firearms? Yes No Are the firearms secured? 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 honest. 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, Yes No
which year: _____

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 possibly 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/Firearms	
DESCRIPTION OF ASSET	VALUE AS OF DATE OF DEATH

Personal Property	
	VALUE AS OF DATE OF DEATH

DECEDENT'S NON-PROBATE ASSETS:

(Please list any assets decedent had a beneficiary designation or transfer-on-death beneficiary listed and/or any assets that were co-owned and transferred at death with rights of survivorship)

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/Firearms	
DESCRIPTION OF ASSET	VALUE AS OF DATE OF DEATH

Personal Property	
	VALUE AS OF DATE OF DEATH

