



OREGON LEGAL CENTER

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Re: Estate Planning Asset Information

Dear Client:

I want to take the opportunity to thank you again for choosing Oregon Legal Center to help you with your estate planning.

To properly plan your estate we need financial information to help us in determining which plan is best for you. The information requested in this worksheet is necessary to prepare your estate planning documents. This information will be held strictly confidential. Please complete as much information as you can and bring it in or mail or fax it to us before your appointment. The you can either print out the form and fill it in manually, or you can type in the information on your computer and either print it or save it as an Adobe pdf file and email it to OLC as an attachment. The email address is: richardnoble@richardnoble.com

Don't worry if you are unable to complete the form. Just send in as much as you can complete and we will talk about it when we meet. The form is a general form and may ask for information that you do not have. Just leave those areas blank.

Thank you for taking the time to provide this information and thank you again for choosing Oregon Legal Center.

Yours truly.

C. Richard Noble,
Attorney at Law

Client Information:

1. If Married:

Husbands First name: _____

Husband's Middle Name or Initial: _____

Husband's Last Name: _____

Husband's Social Security Number: _____

Husband's Birthdate: _____

Wife's First Name: _____

Wife's Middle Name or Initial: _____

Wife's Last Name: _____

Wife's Social Security Number: _____

Wife's Birthdate: _____

1. If Single:

Your First Name: _____

Your Middle Name or Initial: _____

Your Last Name: _____

Your Social Security Number: _____

Your Birthdate: _____

1. Retirement Accounts (IRA, SEP, 401(k), 403(b), Keogh, TSA, Profit Sharing, Annuities in a retirement plan, etc.:

<u>Company and Address</u>	<u>Name on Acct</u>	<u>Account Number</u>	<u>Value</u>
a. _____ Company Name	_____	_____	\$ _____

Street/Suite			

City/State/Zip			

<u>Company and Address</u>	<u>Name on Acct</u>	<u>Account Number</u>	<u>Value</u>
b. _____ Company Name	_____	_____	\$ _____

Street/Suite			

City/State/Zip			

<u>Company and Address</u>	<u>Name on Acct</u>	<u>Account Number</u>	<u>Value</u>
c. _____ Company Name	_____	_____	\$ _____

Street/Suite			

City/State/Zip			

<u>Company and Address</u>	<u>Name on Acct</u>	<u>Account Number</u>	<u>Value</u>
d. _____ Company Name	_____	_____	\$ _____

Street/Suite			

City/State/Zip			

<u>Company and Address</u>	<u>Name on Acct</u>	<u>Account Number</u>	<u>Value</u>
e. _____ Company Name	_____	_____	\$ _____

Street/Suite			

City/State/Zip			

2. Life Insurance Policies:

<u>Company and Address</u>	<u>Owner of Policy</u>	<u>Policy Number</u>	<u>Current Value</u>	<u>Death Benefit</u>	<u>Employer Provided</u>
a. _____ Company Name	_____	_____	\$ _____	\$ _____	_____
_____					Check if Yes

Street/Suite					

City/State/Zip					

<u>Company and Address</u>	<u>Owner of Policy</u>	<u>Policy Number</u>	<u>Current Value</u>	<u>Death Benefit</u>	<u>Employer Provided</u>
b. _____ Company Name	_____	_____	\$ _____	\$ _____	_____
_____					Check if Yes

Street/Suite					

City/State/Zip					

<u>Company and Address</u>	<u>Owner of Policy</u>	<u>Policy Number</u>	<u>Current Value</u>	<u>Death Benefit</u>	<u>Employer Provided</u>
c. _____ Company Name	_____	_____	\$ _____	\$ _____	_____
_____					Check if Yes

Street/Suite					

City/State/Zip					

<u>Company and Address</u>	<u>Owner of Policy</u>	<u>Policy Number</u>	<u>Current Value</u>	<u>Death Benefit</u>	<u>Employer Provided</u>
d. _____ Company Name	_____	_____	\$ _____	\$ _____	_____
_____					Check if Yes

Street/Suite					

City/State/Zip					

<u>Company and Address</u>	<u>Owner of Policy</u>	<u>Policy Number</u>	<u>Current Value</u>	<u>Death Benefit</u>	<u>Employer Provided</u>
e. _____ Company Name	_____	_____	\$ _____	\$ _____	_____
_____					Check if Yes

Street/Suite					

City/State/Zip					

3. Real Estate:

<u>Address</u>	<u>How Titled</u>	<u>Approx. Value</u>	<u>Mortgage Amount</u>
a. _____ Description, ie. residence/rental	_____	\$ _____	\$ _____
_____ Street			
_____ City/State/Zip			

<u>Address</u>	<u>How Titled</u>	<u>Approx. Value</u>	<u>Mortgage Amount</u>
b. _____ Description, ie. residence/rental	_____	\$ _____	\$ _____
_____ Street			
_____ City/State/Zip			

<u>Address</u>	<u>How Titled</u>	<u>Approx. Value</u>	<u>Mortgage Amount</u>
c. _____ Description, ie. residence/rental	_____	\$ _____	\$ _____
_____ Street			
_____ City/State/Zip			

<u>Address</u>	<u>How Titled</u>	<u>Approx. Value</u>	<u>Mortgage Amount</u>
d. _____ Description, ie. residence/rental	_____	\$ _____	\$ _____
_____ Street			
_____ City/State/Zip			

<u>Address</u>	<u>How Titled</u>	<u>Approx. Value</u>	<u>Mortgage Amount</u>
e. _____ Description, ie. residence/rental	_____	\$ _____	\$ _____
_____ Street			
_____ City/State/Zip			

4. Bank Accounts (checking, savings, and CDs):

<u>Bank and Address</u>	<u>Type of Account</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
a. _____ Bank Name	_____	_____	_____	\$ _____
_____		_____		

City/State/Zip				

<u>Bank and Address</u>	<u>Type of Account</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
b. _____ Bank Name	_____	_____	_____	\$ _____
_____		_____		

City/State/Zip				

<u>Bank and Address</u>	<u>Type of Account</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
c. _____ Bank Name	_____	_____	_____	\$ _____
_____		_____		

City/State/Zip				

<u>Bank and Address</u>	<u>Type of Account</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
d. _____ Bank Name	_____	_____	_____	\$ _____
_____		_____		

City/State/Zip				

<u>Bank and Address</u>	<u>Type of Account</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
e. _____ Bank Name	_____	_____	_____	\$ _____
_____		_____		

City/State/Zip				

5. Brokerage Accounts, Mutual Funds, and Money Market Accounts-(Not Retirement Accounts):

<u>Company/Broker</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
a. _____ Broker/Company Name	_____	_____	\$ _____
_____	_____		

City/State/Zip			

<u>Company/Broker</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
b. _____ Broker/Company Name	_____	_____	\$ _____
_____	_____		

City/State/Zip			

<u>Company/Broker</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
c. _____ Broker/Company Name	_____	_____	\$ _____
_____	_____		

City/State/Zip			

<u>Company/Broker</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
d. _____ Broker/Company Name	_____	_____	\$ _____
_____	_____		

City/State/Zip			

<u>Company/Broker</u>	<u>Owner(s) of Account</u>	<u>Account Number</u>	<u>Approx Balance</u>
e. _____ Broker/Company Name	_____	_____	\$ _____
_____	_____		

City/State/Zip			

6. Stocks Held in Certificate Form:

<u>Company</u>	<u>Owner(s) of Certificate</u>	<u>Number of Shares</u>	<u>Approx Value</u>
a. _____ Company Name	_____	_____	\$ _____
_____	_____		

City/State/Zip			

<u>Company</u>	<u>Owner(s) of Certificate</u>	<u>Number of Shares</u>	<u>Approx Value</u>
b. _____ Company Name	_____	_____	\$ _____
_____	_____		

City/State/Zip			

<u>Company</u>	<u>Owner(s) of Certificate</u>	<u>Number of Shares</u>	<u>Approx Value</u>
c. _____ Company Name	_____	_____	\$ _____
_____	_____		

City/State/Zip			

<u>Company</u>	<u>Owner(s) of Certificate</u>	<u>Number of Shares</u>	<u>Approx Value</u>
d. _____ Company Name	_____	_____	\$ _____
_____	_____		

City/State/Zip			

<u>Company</u>	<u>Owner(s) of Certificate</u>	<u>Number of Shares</u>	<u>Approx Value</u>
e. _____ Company Name	_____	_____	\$ _____
_____	_____		

City/State/Zip			

7. Annuities (Not Held in a Retirement Account):

<u>Company</u>	<u>Annuitant</u>	<u>Name on Account</u>	<u>Account Number</u>	<u>Approx Value</u>
a. _____ Company Name	_____	_____	_____	\$ _____

Street/Suite				

City/State/Zip				

<u>Company</u>	<u>Annuitant</u>	<u>Name on Account</u>	<u>Account Number</u>	<u>Approx Value</u>
b. _____ Company Name	_____	_____	_____	\$ _____

Street/Suite				

City/State/Zip				

<u>Company</u>	<u>Annuitant</u>	<u>Name on Account</u>	<u>Account Number</u>	<u>Approx Value</u>
c. _____ Company Name	_____	_____	_____	\$ _____

Street/Suite				

City/State/Zip				

<u>Company</u>	<u>Annuitant</u>	<u>Name on Account</u>	<u>Account Number</u>	<u>Approx Value</u>
d. _____ Company Name	_____	_____	_____	\$ _____

Street/Suite				

City/State/Zip				

<u>Company</u>	<u>Annuitant</u>	<u>Name on Account</u>	<u>Account Number</u>	<u>Approx Value</u>
e. _____ Company Name	_____	_____	_____	\$ _____

Street/Suite				

City/State/Zip				

8. Stock Options, Employee Stock Purchase Plans, etc:

<u>Company</u>	<u>Owner</u>	<u>Vested</u>	<u>Unvested</u>	<u>Approx Value</u>
a. _____ Company Name	_____	_____	_____	\$ _____

Street/Suite				

City/State/Zip				
b. _____ Company Name	_____	_____	_____	\$ _____

Street/Suite				

City/State/Zip				
c. _____ Company Name	_____	_____	_____	\$ _____

Street/Suite				

City/State/Zip				
d. _____ Company Name	_____	_____	_____	\$ _____

Street/Suite				

City/State/Zip				
e. _____ Company Name	_____	_____	_____	\$ _____

Street/Suite				

City/State/Zip				

9. Promissory Notes, Real Estate Contracts, and Other Receivables Owed to You:

<u>Buyer/Borrower</u>	<u>Date of Note or Contract</u>	<u>Property Securing Note or Contract</u>	<u>Approx Balance</u>
a. _____ Buyer/Borrower Name	_____	_____	\$ _____
_____ Street/Suite		_____	
_____ City/State/Zip		City/State/Zip	

<u>Buyer/Borrower</u>	<u>Date of Note or Contract</u>	<u>Property Securing Note or Contract</u>	<u>Approx Balance</u>
b. _____ Buyer/Borrower Name	_____	_____	\$ _____
_____ Street/Suite		_____	
_____ City/State/Zip		City/State/Zip	

<u>Buyer/Borrower</u>	<u>Date of Note or Contract</u>	<u>Property Securing Note or Contract</u>	<u>Approx Balance</u>
c. _____ Buyer/Borrower Name	_____	_____	\$ _____
_____ Street/Suite		_____	
_____ City/State/Zip		City/State/Zip	

<u>Buyer/Borrower</u>	<u>Date of Note or Contract</u>	<u>Property Securing Note or Contract</u>	<u>Approx Balance</u>
d. _____ Buyer/Borrower Name	_____	_____	\$ _____
_____ Street/Suite		_____	
_____ City/State/Zip		City/State/Zip	

<u>Buyer/Borrower</u>	<u>Date of Note or Contract</u>	<u>Property Securing Note or Contract</u>	<u>Approx Balance</u>
e. _____ Buyer/Borrower Name	_____	_____	\$ _____
_____ Street/Suite		_____	
_____ City/State/Zip		City/State/Zip	

10. Closely Held Business Interests:

<u>Company</u>	<u>Owner</u>	<u>Shares/Units/ Percentage of Ownership</u>	<u>Approx Value</u>
a. _____ Company Name	_____	_____	\$ _____

Street/Suite			

City/State/Zip			

<u>Company</u>	<u>Owner</u>	<u>Shares/Units/ Percentage of Ownership</u>	<u>Approx Value</u>
b. _____ Company Name	_____	_____	\$ _____

Street/Suite			

City/State/Zip			

<u>Company</u>	<u>Owner</u>	<u>Shares/Units/ Percentage of Ownership</u>	<u>Approx Value</u>
c. _____ Company Name	_____	_____	\$ _____

Street/Suite			

City/State/Zip			

<u>Company</u>	<u>Owner</u>	<u>Shares/Units/ Percentage of Ownership</u>	<u>Approx Value</u>
d. _____ Company Name	_____	_____	\$ _____

Street/Suite			

City/State/Zip			