



OREGON LEGAL CENTER

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Re: Estate Planning 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.

Please take the time to fill out this form to provide information we need to prepare your estate planning documents. If you have any questions about filling out the form just call me at 503 635-6235 and I can help you. Sometimes that is the easiest way to get the job done.

This form is set up in Adobe Acrobat so that you can use your computer to fill it in. When you are done you can save it. Then you can email it to me as an email attachment, or you could print it and fax it to me, or you could mail it to me. Please make sure I have the form a few days in advance of our appointment.

The email address is: richardnoble@richardnoble.com. The fax number is 503 635-6668.

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

Child 2 Birthdate: _____

Child 3 Name: _____

Child 3 Birthdate: _____

Child 4 Name: _____

Child 4 Birthdate: _____

Child 5 Name: _____

Child 5 Birthdate: _____

Child 6 Name: _____

Child 6 Birthdate: _____

Deceased Children:

Does husband have any deceased children? _____
Yes No

Does wife have any deceased children? _____
Yes No

If husband has any children not born of this marriage please provide the names and birthdates. Otherwise, skip this section.

Child 1 Name: _____

Child 1 Birthdate: _____

Child 2 Name: _____

Child 2 Birthdate: _____

Child 3 Name: _____

Child 3 Birthdate: _____

Child 4 Name: _____

Child 4 Birthdate: _____

If wife has any children not born of this marriage please provide the names and birthdates. Otherwise, skip this section.

Child 1 Name: _____

Child 1 Birthdate: _____

Child 2 Name: _____

Child 2 Birthdate: _____

Child 3 Name: _____

Child 3 Birthdate: _____

Child 4 Name: _____

Child 4 Birthdate: _____

Personal Representative:

After the second spouse dies, who is going to be in charge of winding up the estate (Personal Representative)? _____

Who would be an alternate Personal Representative? _____

Guardian:

If there are any children under age 18, who is going to be nominated as the Guardian? _____

Who would be an alternate Guardian? _____

Trustee of Trust for Children:

If there are children under age 25, who is going to be the Trustee of the children's trust? _____

Who would serve as the Alternate Trustee? _____

Specific Gifts:

After the second spouse dies, will any gifts be made to any specific people or institutions such as church or charity? _____
Yes No

If so, who will get the specific gifts?

Specific Gift Beneficiary 1: _____

Specific Gift 1: \$ _____

Specific Gift Beneficiary 2: _____

Specific Gift 2: \$ _____

Specific Gift Beneficiary 3: _____

Specific Gift 3: \$ _____

Who gets the personal property such as household goods, jewelry, photographs, collections, etc.? Generally this would be equal to children or equal to a group of people. If you have specific items you wish to leave to specific people, there will be another document where you can write that in at the signing ceremony.

Is personal property going equally to the children? _____
Yes No

Or Is it going to go equally to certain individuals _____
Yes No

If equally to individuals provide the following information:

Personal Property Beneficiary 1: _____

Personal Property Beneficiary 2: _____

Personal Property Beneficiary 3: _____

Personal Property Beneficiary 4: _____

Personal Property Beneficiary 5: _____

Personal Property Beneficiary 6: _____

