

CONFIDENTIAL FAMILY INFORMATION SHEET
(To be filled out by client needing estate plan)

Date: _____

Your Full Legal Name: _____

Residence Address: _____

Residence Phone: _____ Business Phone: _____

Email: _____ Preferred Method of Contact: _____

Marital Status: Single Married Oregon Registered Domestic Partner Divorced
 Widow / Widower Year married: _____ Year Spouse died: _____

Do you have a Prenuptial Agreement in effect? _____

Do you want you and your spouse to be jointly represented by this firm? _____

	Husband	Wife
Full Legal Name		
Former/Other Name		
S.S. No.		
Vet ID No.		
Birthdate		
Birthplace		
Citizenship		
Occupation		

FORMER MARRIAGE(S)			
Former Spouse Name			
S.S. No. of Former Spouse			
Date of Marriage			
Date of Divorce			
Copy of Dissolution Papers	<input type="checkbox"/> Provided to attorney <input type="checkbox"/> I do not have a copy <input type="checkbox"/> I will get a copy & provide	<input type="checkbox"/> Provided to attorney <input type="checkbox"/> I do not have a copy <input type="checkbox"/> I will get a copy & provide	<input type="checkbox"/> Provided to attorney <input type="checkbox"/> I do not have a copy <input type="checkbox"/> I will get a copy & provide

CHILDREN OF THIS MARRIAGE <i>(including adopted children)</i>			
Name:			DOB:
Name:			DOB:
Name:			DOB:
CHILDREN OF FORMER MARRIAGE(S)			
Name:		Parents:	DOB:
Name:		Parents:	DOB:
Name:		Parents:	DOB:
ADVISORS			
TITLE	NAME	ADDRESS	TELEPHONE
Attorney			
Accountant			
Financial Advisor			
Primary Personal Bank			
Life Insurance Agent			
Stock Broker			
Referred to our firm by			

PROPERTY INFORMATION:

Real Estate:

Description & Location	Ownership	Market Value	Balance of Mortgage	Net Equity
_____	H W JT			
_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	\$ _____	\$ _____
_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	\$ _____	\$ _____
_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	\$ _____	\$ _____
_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	\$ _____	\$ _____
_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	\$ _____	\$ _____

Is any of the real estate described above (or in any other section of this form) farmland, forestland, or used in a commercial fishing operation? _____

Is any of the real estate owned by a Trust? _____

Cash Accounts:

Name of Institution	Ownership			Checking	Savings CD's Or Money Market	
	H	W	JT			
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____	\$ _____

Safe Deposit Box:

Safe Deposit Box: _____ Name of Institution _____

Branch _____ Box No.: _____ Ownership: H W Jt

Others listed on box:

Name: _____ Relationship: _____

Address: _____

Phone: _____

Investments: (Stocks, Bonds, etc. If held in street name with Broker, just list the Brokerage Account. Investments held in IRAs, 401(k)s and similar tax-deferred plans or accounts should be listed on page 5 under Retirement Benefits.)

	Ownership			Value
	H	W	JT	
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____

Business Interests: (For type use "C" for Corporation, "S" for S Corporation, "P" for Partnership, "LLC" for Limited Liability Company, "SP" for Sole Proprietorship)

Name of Business	H	W	JT	Type					% Interest	Value
				C	S	P	LLC	SP		
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____	\$ _____

Do any of the above-described business interests involve farmland, forestland, or a commercial fishing operation? _____

Mortgages, Notes, and Other Receivables: (Money payable to you.)

	Ownership			Date of Note	Amount Now Due
	H	W	JT		
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____	\$ _____

Miscellaneous: (List only major personal effects such as automobiles, valuable jewelry, paintings, coin collections, stamp collections, etc.)

	Ownership			Net Value
	H	W	JT	
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____

Life Insurance:

Company	Type (Term, W/L, etc)	Owner	Beneficiary	Alternate Beneficiary	Death Benefit	Policy Loans

Annuities:

Company	Type (Term, W/L, etc)	Owner	Beneficiary	Alternate Beneficiary	Death Benefit	Policy Loans
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Retirement Benefits: (Including IRAs, 401(k)s, and similar tax-deferred plans or accounts)

	H	W	Name of Beneficiary	Present Value
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	\$ _____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	\$ _____

Estate Summary:

	H	W	JT.
Real Estate	\$ _____	\$ _____	\$ _____
Cash Accounts	\$ _____	\$ _____	\$ _____
Investments	\$ _____	\$ _____	\$ _____
Business Interests	\$ _____	\$ _____	\$ _____
Receivables	\$ _____	\$ _____	\$ _____
Miscellaneous	\$ _____	\$ _____	\$ _____
Life Insurance	\$ _____	\$ _____	\$ _____
Annuities	\$ _____	\$ _____	\$ _____
Retirement Benefits	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____	\$ _____

We will discuss how to select Personal Representatives, Guardians, and Trustees in our meeting. Please insert your tentative choices below.

Personal Representative (carries out the terms of your will):

1st Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

2nd Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

3rd Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

Guardian / Conservator (to make decisions for you and handle your affairs if you are unable):

1st Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

2nd Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

Guardian (to care for minor children):

1st Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

2nd Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

Trustee (to manage funds for minor children or to manage funds after death of spouse):

1st Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

2nd Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

Trustee (to manage funds for minor children or to manage funds after death of spouse):

3rd Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

Attorney-In-Fact For Business Affairs (to handle your financial affairs, generally after your incapacity):

1st Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

2nd Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

Health Care Representative (makes health care decisions when you are unable):

1st Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

2nd Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

Person to make decisions regarding disposition of remains (Note form requirements in ORS 97.130):

1st Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

2nd Choice: _____ Relationship: _____

Address: _____

Phone: _____ Fax: _____

Generally, to whom do you want to leave your assets:

Special Bequests (specific items you wish to give to people):

Name	Address	Phone	Item or Amount	Relationship
1)	_____	_____	_____	_____
2)	_____	_____	_____	_____
3)	_____	_____	_____	_____

Charitable Bequests (gifts you wish to make to charitable organizations):

Name of Organization	Address	Item or Amount
1)	_____	_____
2)	_____	_____
3)	_____	_____

Any special provisions relating to pets (disposition, assets held for maintenance of pets, etc.):

Residue of Estate (list who is to receive estate after you have made your general, specific, and charitable gifts):

Person(s)	Address	Percentage
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Contingent Beneficiaries (in the event all primary beneficiaries are deceased):

Person(s)	Address	Phone
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Other Special Provisions Desired:

Important Family Questions:

1. Do you have a child with a learning disability? Yes No
2. Do any of your family receive governmental support or benefits? Yes No
3. Do you have adopted children? Yes No
4. Do any of your children have special education, medical, or physical needs? Yes No
5. Are any of your children institutionalized? Yes No
6. Are you or your spouse receiving social security, disability, or other governmental benefits? Yes No
7. Do you provide primary or other major financial support to adult children? Yes No
8. Have either of you been divorced? Yes No
9. Are you making payments pursuant to a divorce or property settlement agreement? Yes No
10. Do you have any ongoing requirements for your ex-spouse or children, such as maintaining a life insurance policy on your life? Yes No
11. Have you and your spouse ever signed a pre-or post-marriage contract? Yes No
(Please furnish a copy)
12. Have you or your spouse been widowed? Yes No
(If a federal estate tax return or a state death tax return was filed, please furnish a copy)
13. In what states have you lived while married to your current spouse? Yes No
During what periods of time did you reside there? _____

14. Have you or your spouse ever filed federal or state gift tax returns? Yes No
(Please furnish copies of these returns)

15. Have you or your spouse completed previous wills, powers of attorney, or other estate planning arrangements? *(Please furnish copies of these documents)* Yes No
16. Are you a member of an Oregon registered domestic partnership or same-sex marriage? Yes No
17. Do either of you have a PERS account? Yes No
18. Have either of you ever created a trust? Yes No
19. Are either of you serving as the trustee of a trust? Yes No
20. Are either of you the potential beneficiary of a trust or estate? Yes No
21. Are both you and your spouse United States citizens?
If you answered "No", are either you or your spouse a resident or a nonresident alien? Yes No
22. Do you want specific funeral arrangements?
Specify, if applicable: _____

Yes N

Other Information or Comments:

Thank you for taking the time to fill out this form. It makes our meeting more productive.

IMPORTANT NOTICES

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