



LAW OFFICE OF JULIA RICE

Estate Planning & Administration
www.juliaricelaw.com

Office Locations:

1011 LIBERTY ST. SE, SALEM, OR 97302
5200 SW MEADOWS RD., STE. 150, LAKE OSWEGO, OR 97035

julia@juliaricelaw.com ~ Mailing Address: P.O. Box 442, Lake Oswego, Oregon 97034 ~ (503) 726-5990

Miscellaneous

1. What size is the decedent’s estate, approximately?

- Under \$1,000,000
- \$1,000,001 - \$3,000,000
- \$3,000,001 - \$6,500,000
- More than \$6,500,000

2. Do any beneficiaries have special needs or receive government assistance? Yes No

If yes, please provide additional information: _____

3. History of Gifts: List all gifts the decedent made in excess of \$10,000 and all gifts of life insurance.

<u>Date of Gift</u>	<u>Donor</u>	<u>Recipient</u>	<u>Value</u>	<u>Reason for Gift</u>
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4. Has the decedent ever filed a gift tax return? Yes No

5. Did the decedent have any payment or life insurance obligations either to a former spouse or to children of a prior marriage embodied in any judgment or written agreement? Yes No **If Yes, please provide copies.**

Summary of Decedent’s Assets

Please provide the most recent statement, the company name, and the approximate value for the following assets:

1. Bank Accounts

2. Brokerage/Stock Accounts

3. Certificates of Deposit



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4. Real Property (please provide address and county)

5. 401(k)/IRAs (include beneficiary designations)

6. Pension/Additional Retirement Accounts (include beneficiary designations)

7. Life Insurance (include beneficiary designations)

8. Safe Deposit Box

9. Please provide a copy of the following documents, if executed by decedent:

- A will
- A revocable living trust
- An irrevocable life insurance trust
- A retirement trust
- A prenuptial agreement