

**PROBATE AND/OR TRUST ADMINISTRATION  
INITIAL INFORMATION FORM - Basic**

**DOCUMENTS TO BE PROVIDED TO LAWYER IF AVAILABLE:**

- A. Death Certificate.
- B. Decedent's Will, if any.
- C. Decedent's Trust, if any.

**CALL IN INFORMATION IN ADVANCE**

In addition to bringing the following documents with you to your appointment if possible, please also call in a day or two before your appointment, and let the attorney's staff know the address of any real estate in which the ill person or his or her spouse has any interest, so that the attorney can obtain copies of deeds before his meeting with you.  Done

**INFORMATION NEEDED:**

**A. Decedent's Vital Statistics:**

Is there a Will?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Date
Is there a Trust?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Date
Provide copies	<input type="checkbox"/> Will	<input type="checkbox"/> Trust	
Decedent also known as			
Place of death, including State and County			
Residence at time of death, including State and County			
Date of Birth		Date of death	
Decedent's marital status (circle one):			
single	married	legally separated	divorced      widowed

**B. Personal Representative/Executor/Successor Trustee:**

Full Legal Name	
Address	
Phone	SS No.

**C. Decedent's Spouse:**

Spouse's name
SS No.
Spouse's residence
Date and place of spouse's death, if deceased.

**D. Heirs at Law:**

Children (or grandchildren for any child already deceased) (state age if minors). If no decedents, give decedent's parents' names if still living. If no living decedent's parent, discuss with lawyer.  
(Attach separate list if not sufficient space)

Name/Address	SS No.

**E. Need for Special Administrator:**

Does an emergency exist with respect to any estate assets (such as decedent's business, pending closings, perishable asset, etc.)?
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**F. Immediate Need for Funds:**

Does the surviving spouse or other successor need immediate funds?
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**G. Emergencies or Immediate Problems:**

Any payments due on installment obligations, mortgages, etc?
What?
Any other critical due dates or action dates?
What?

**H. Property Outside County or State of Oregon:**

Did decedent own any property in any state or county other than that of last domicile?

Yes \_\_\_ No \_\_\_

Where? Address, if known, including State and County