



Estate Planning Worksheet

Date: _____

Family Information:

Full Legal Name: _____
First Middle Last

Address: _____
Street City State Zip

Phone: Home _____ Office _____ Mobile: _____

Birth Date: _____ S.S.N. _____

Occupation: _____

Marital Status: Single Married Widowed Divorced

Do you have a Will?

No Yes (*If so, please furnish a copy*) Date of Will: _____

Legal Name of Spouse: _____
First Middle Last

Birth Date: _____ S.S.N. _____

Occupation: _____

Does Spouse have a Will?

No Yes (*If so, please furnish a copy*) Date of Will: _____

Children (including adopted children):

Full Name

Full Address

Birth Date

Personal Representative

(Carriers out terms of Will)

Name

Address

First Choice _____

Second Choice _____

Guardian

(For minor children)

Name

Address

First Choice _____

Second Choice _____

Trustee or Custodian

(To manage funds for minor children, if any - may be best to name someone different than guardian)

Name

Address

First Choice _____

Second Choice _____

Specific Bequests

(Items of a personal nature)

<i>Names of Persons or Organization</i>	<i>Address</i>	<i>Item or Amount</i>
1) _____		
2) _____		
3) _____		
4) _____		

Charitable Bequests

<i>Name of Organization</i>	<i>Address</i>	<i>Item or Amount</i>
1) _____		
2) _____		
3) _____		
4) _____		

Residue of Estate

(After charitable and specific bequests)

<i>Person(s) or Institution</i>	<i>Address</i>	<i>Percentage</i>
1) _____		
2) _____		
3) _____		
4) _____		

Property Information:

Real Estate:

Description & Location	Ownership			Market Value	Mortgage Balance	Net Equity	Cost Basis
	H	W	Jt.				
_____	[]	[]	[]	\$ _____	\$ _____	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____	\$ _____	\$ _____

Investments:

(Stocks, Bonds, Loans, Mortgages, Certificates, etc.)

	Ownership			Net Value	Cost Basis
	H	W	Jt.		
_____	[]	[]	[]	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____

Bank Accounts:

	Ownership			Checking	Savings
	H	W	Jt.		
_____	[]	[]	[]	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____
_____	[]	[]	[]	\$ _____	\$ _____

Miscellaneous:

(Automobiles, Valuable Jewelry, Paintings, Coin Collections, Stamp Collections, etc.)

	<i>Ownership</i>	<i>Net Value</i>
	<i>H W Jt.</i>	
_____	[] [] []	\$ _____
_____	[] [] []	\$ _____
_____	[] [] []	\$ _____
_____	[] [] []	\$ _____
_____	[] [] []	\$ _____

Life Insurance:

<i>Company</i>	<i>Type</i>	<i>Owner</i>	<i>Benefic.</i>	<i>Alternate Benefic.</i>	<i>Death Benefit</i>	<i>Policy Loans</i>
_____	_____	_____	_____	_____	\$ _____	_____
_____	_____	_____	_____	_____	\$ _____	_____
_____	_____	_____	_____	_____	\$ _____	_____
_____	_____	_____	_____	_____	\$ _____	_____
_____	_____	_____	_____	_____	\$ _____	_____

Retirement Benefits (Including IRAs):

	<i>H W</i>	<i>Beneficiary (if any)</i>	<i>Present Value</i>
_____	[] []	_____	\$ _____
_____	[] []	_____	\$ _____
_____	[] []	_____	\$ _____
_____	[] []	_____	\$ _____
_____	[] []	_____	\$ _____

Estate Summary

	<i>Husband</i>	<i>Wife</i>	<i>Joint</i>
Real Estate	\$ _____	\$ _____	\$ _____
Investments	\$ _____	\$ _____	\$ _____
Bank Accounts	\$ _____	\$ _____	\$ _____
Miscellaneous	\$ _____	\$ _____	\$ _____
Life Insurance (Benef.)	\$ _____	\$ _____	\$ _____
Retirement	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____	\$ _____

Other Documents

(Please provide copies)

1. Do you have a Living Will (*Directive to Physicians*)? [] Yes [] No
2. Does your spouse have a Living Will? [] Yes [] No
3. Have you signed a Power of Attorney? [] Yes [] No
4. Has your spouse signed a Power of Attorney? [] Yes [] No

Other Information or Comments

Important Ethical Statement

The legal profession has become appropriately concerned about joint representation of clients. This includes joint representation of husbands and wives during estate planning.

It is customary for a husband and wife to employ a single law firm to assist them with their estate planning. Nevertheless, our Rules of Professional Ethics restrict our ability to represent multiple clients who do not have conflicting interests when the likelihood, however remote, arises that the clients may in the future have conflicting interests. Our Rules of Professional Ethics require that we inform you of reasonably foreseeable conflicts which could occur in our representation of the two of you. Our Rules also require that we obtain your consent before we can represent the two of you.

Although it is difficult to specify exactly what conflicts of interest may arise in the future, there are potential issues that can be identified. For instance, since we would be representing you both, each of you would be our client. As a result, confidential or secret matters which one of you may discuss with a member of this office, could not be protected by the attorney-client privilege from disclosure to the other. Stated simply, we cannot agree to withhold information from either of you which was given to us by the other. Please understand, however, we are still responsible to keep any information either of you provides us strictly confidential from third parties.

As you know, if a disagreement arises between the two of you regarding your estate planning, we can point out the ramifications of different possible alternatives. However, our Rules of Professional Ethics prevent us from advocating the position of one of you against the other.

For example, if either of you have been previously married and have separate families, this could create additional potential problems. Although your families may be on good terms at this time, it would not be unusual for your estate plans to differ or for one of you to have a falling out with the other's family. If this were to occur, it could result in a change in the estate plan of one of you, which could create a conflict of interest between the two of you.

In the event either of you receives an inheritance and choose to deal with it differently than the rest of your assets, this too, could create a potential conflict of interest between the two of you.

The possibility of divorce must also be recognized. Our recommendations today could affect income, property or support provisions in any divorce proceeding.

We are only allowed to represent you both only to the extent that we can act to the best of our ability on behalf of each of you. In the event you come to a substantial disagreement during the course of our representation regarding how your separate estates should be structured or in the event the two of you develop a serious conflict, we may be forced to resign from representing you. In that event, we would advise you to obtain separate, independent counsel.

Please review this Ethical Statement carefully and, if you like, feel free to consult with other counsel before deciding what to do. In the event you wish to proceed with our representation, please sign below and return to our office when we meet. By signing and returning, you will

have acknowledged that you have read and understand this Ethical Statement and that you ask us to proceed with representing both of you in your estate planning.

We look forward to working closely with the two of you and will represent you both to the best of our ability. Please let us know if you have any questions or comments.

Consent

We acknowledge that we have read and understand the terms of this Ethical Statement. We consent to the law firm of Innovative Law Group representing both of us in our estate planning on the terms and conditions set out in this Ethical Statement, we understand the discussion of conflicts of interest set out above and agree that between the two of us, there shall be no confidence or secrets disclosed to you by one of us which you cannot reveal to the other.

Client

Client

Date: _____

Date: _____



Privacy Policy Notice

Attorneys who provide legal services involving financial matters of clients (such as real estate transactions, wills, contracts, etc...) are now required by federal law to inform their clients of their policies on the privacy of client information. The purpose of this notice is to explain how we will continue to protect your privacy and what we do with information you provide to us.

We are firmly committed to protecting the privacy of current, former and future clients and to protecting the security and confidentiality of your nonpublic personal information. As Oregon attorneys, we are bound by the Oregon Code of Professional Responsibility which also requires us to protect your confidentiality. Our policies and our professional standards are even more stringent than those now required by federal law. Therefore, we have always protected your right to privacy and will continue to do so. Federal law now also requires that we let you know how we are protecting your privacy.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you that is provided to us by you or obtained by us in the course of providing you with legal services that you have requested. This information, in some cases, includes information about your personal finances and property.

Disclosure of Information

We disclose nonpublic personal information about you only as necessary to provide you with the legal services that you have requested. For instance, our staff may have access to your nonpublic personal information in order for us to efficiently provide you with legal services. In some situations we may provide information to another organization (such as your accountant, your realtor or your insurance company) in order to obtain information or assist in providing legal services.

We do not disclose any nonpublic personal information about you to anyone, except as is necessary in order to provide you with the legal services that you have requested.

You Have The Right to Prohibit Disclosure

If for any reason you do not want us to provide nonpublic personal information about you to these other parties in providing you with legal services, you may direct us not to make those disclosures. If you wish to direct us not to disclose information, please call Alan Thayer at 541-345-2325.

Your Privacy Is Important to Us

We retain records and files relating to the professional services you have asked us to provide. In order to guard your nonpublic personal information, we maintain physical, electronic and procedural safeguards that comply with the Code of Professional Responsibility that governs our profession. Please call us with any questions that you may have about how we protect your privacy.