Drescher Elson Sperber, P.C.

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21 S 2nd St
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Personal Information

First Spouse's Full Legal Name ______________________________

AKA(s) ______________________ Date of Birth ______________

Address ______________________________

County of Residence ______________ Email ______________

Phone: Home ______________ Bus. ______________ Cell ______

Second Spouse's Full Legal Name ______________________________

AKA(s) ______________________ Date of Birth ______________

Address ______________________________

County of Residence ______________ Email ______________

Phone: Home ______________ Bus. ______________ Cell ______

Children (minors and adult)

Full Legal Name of Child	Date of Birth	Parents

If any of your children are minors, please also think about whom you would want to act as guardians and provide their name, address, and phone number on a separate sheet.

Who will be in Charge of Your Finances if Both of You are Unable?

First Choice – Name, Address, Phone **Relation**

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Second Choice – Name, Address, Phone **Relation**

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Plan of Distribution

Briefly, how do you want your property disposed of at your death? Please provide any other information you think is pertinent to your estate plan.

Special Concerns

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Documents to Bring to the Meeting

1. Addresses to all real estate you own, whether in Oregon or other states.

2. Original Trust, Will, Trust and Powers of Attorney (for assets and/or health care), Advance Directive for Health Care, if any. (If you are only able to locate copies, that is fine.)

3. Most recent statement for all bank accounts, including but not limited to savings and checking accounts, certificates of deposit, brokerage, etc.

4. Most recent statement for any Pension, Profit Sharing Plan, IRA, 401(k), or other retirement plans in which you have an interest.

5. Stock certificates, mutual fund share certificates, limited partnership investment certificates, and any and all other documents evidencing any other investments you may have.

6. The declaration page of all life insurance policies on your life, as well as any other policies you own which insure the lives of other people, if any.

7. Partnership Agreements in which you are a partner, or of any Buy/Sell Agreements to which you are a signatory, if any.

Please bring actual statements rather than a compilation of the information in a list as there is information on the actual statements that aids me in having a meaningful discussion with you about your estate plan.

If you are unable to gather all of these documents before our meeting, please do not worry - we will work with what we have! This list represents the "perfect world" for an initial meeting to discuss your estate plan.

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