



## Estate Planning Packet

Laura A. Schroeder, Esq.  
[schroeder@water-law.com](mailto:schroeder@water-law.com)

Olivia V. Marovich  
[o.marovich@water-law.com](mailto:o.marovich@water-law.com)

1915 NE Cesar E. Chavez Blvd.  
Portland, OR 97212

Phone: (503) 281-4100  
FAX: (877) 600-4971  
[www.water-law.com](http://www.water-law.com)

## HOW MUCH DO YOU KNOW ABOUT A WILL?

Your will is a very important document for you and your family. It provides a myriad of asset transfer abilities and often compliments the personal trusts you establish.

1. If you have a will, your estate does not go through probate. T F
2. Your witnesses must read your will. T F
3. Life insurance must pass by the will. T F
4. Probate typically takes more than three months. T F
5. A will can create a spendthrift trust. T F
6. Heirs pay income tax on proceeds of a will. T F
7. A will can be challenged in court. T F
8. A will controls money in a joint bank account. T F
9. A will is probated before the funeral. T F
10. Both you and your spouse should have wills. T F
11. Joint ownership is an adequate will substitute. T F
12. A joint will is one document for two people. T F
13. A handwritten will must be notarized. T F
14. A will can nominate a guardian for your child. T F
15. A will is the only way property can be transferred from one generation to another. T F
16. A trust created by a will is a testamentary trust. T F
17. Assets passed by a will are not in the taxable estate. T F
18. If you own property in more than one state, your estate may need to be probated in each state where property is located. T F
19. If you do not have a will, your property may pass under the laws of your state. T F
20. A properly written will written over 20 years ago is no longer valid. T F
21. A will designed to pass assets into a living trust is called a pour-over will. T F
22. If you do not have a will, the person you want is automatically selected to be your children's guardian. T F
23. In case more than one will is submitted for probate, state court may decide which is the valid will. T F
24. If you have a living trust, you do not need a will. T F
25. To be valid, a will must be signed. T F

**WILL INFORMATION SHEET**

Date \_\_\_\_\_

Name of Client: \_\_\_\_\_

Residence Address: \_\_\_\_\_

Residence Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Marital Status:  Single  Married  Divorced  Widow / Widower Year married: \_\_\_\_\_

	Client	Spouse (if married)
Full Name		
Former/Other Name		
S.S. No.		
Vet ID No.		
Birth Date		
Birthplace		
Occupation		
Prior Marriages		

CHILDREN OF THIS MARRIAGE	
Name: _____	DOB: _____
Name: _____	DOB: _____
Name: _____	DOB: _____
Name: _____	DOB: _____
CHILDREN OF FORMER MARRIAGE(S)	
Name: _____	DOB: _____
Name: _____	DOB: _____
Name: _____	DOB: _____
Name: _____	DOB: _____

Guardian of Minor Children: \_\_\_\_\_ Relationship: \_\_\_\_\_

Alternate: \_\_\_\_\_ Relationship: \_\_\_\_\_

Guardian / Conservator (self): \_\_\_\_\_ Relationship: \_\_\_\_\_

Alternate: \_\_\_\_\_ Relationship: \_\_\_\_\_

Personal Representative: \_\_\_\_\_ Relationship: \_\_\_\_\_

1st Alternate Per. Rep.: \_\_\_\_\_ Relationship: \_\_\_\_\_

2nd Alternate Per. Rep.: \_\_\_\_\_ Relationship: \_\_\_\_\_

Beneficiaries (in the event of common disaster):  
 \_\_\_\_\_ Relationship: \_\_\_\_\_  
 \_\_\_\_\_ Relationship: \_\_\_\_\_  
 \_\_\_\_\_ Relationship: \_\_\_\_\_

**ASSETS**

Property	Location or Description	In Name of:	Value
Residence			
Real Property			
Bank Accounts			
Stocks and Bonds			
Other			

**LIFE INSURANCE, DEATH BENEFITS, AND RETIREMENT BENEFITS**

Company	Insured	Beneficiary	Contingent Beneficiary	Amount

**ADMINISTRATIVE ITEMS**

Special Funeral Arrangements: \_\_\_\_\_

Location of Safety Deposit Box: \_\_\_\_\_ In Name of: \_\_\_\_\_

Special Bequests:

Special Family Problems:

Special Provisions of Will:

## **Will Information Sheet Addendum**

Do you have a current will?

Is it signed and witnessed?

Are the originals in your possession?

Do you know where the originals are? If not please locate them as soon as possible.

Do you have an existing Prenuptial Agreement, Trust or other Estate Planning Documents?

Do you have an Advance Directive - Power of Attorney for Health Care?

Do you have a Durable Power of Attorney for the Management of Finances?

Please bring copies of these documents to your interview appointment with Laura!

## **Schroeder Law Offices, P.C. Estate Planning Suggested Resources**

### Links to Estate Planning Information Online

#### **Oregon State Bar**

The Oregon State Bar provides information to the public on a wide variety of topics such as Wills Trusts and Elder Law. This information is regularly reviewed updated and includes:

- What is a Will?
- What is Probate?
- What is a Trust?
- Advance Directives (Living Wills)
- Powers of Attorney and Other Decision Making Tools
- Revocable Living Trusts

Oregon State Bar > For the Public > Legal Information Topics > Wills Trusts and Elder Law

<http://www.osbar.org/public/legalinfo/wills.html>

The site also features short videos addressing some common questions. A downloadable guide, "Legal Issues for Older Adults" provides more in-depth information on a wide range of resources and topics including:

- Social Security and Other Benefit Programs
- Medicare
- Medicaid
- Property Ownership, Real Property Transfers, and Taxes
- Managing Your Property and Personal Affairs
- Estate Planning

<http://www.oregonstatebar.org/public/legalissuesbook.html>

#### **Oregon Revised Statutes**

The Oregon Revised Statutes (ORS) are the codified laws of the State of Oregon.

The ORS is published every two years. Each edition incorporates all laws, and changes to laws, enacted by the Legislative Assembly through the odd-numbered year regular session referenced in the volume titles for that edition.

Chapter 112 covers Intestate Succession and Wills:

[https://www.oregonlegislature.gov/bills\\_laws/ors/ors112.html](https://www.oregonlegislature.gov/bills_laws/ors/ors112.html)

#### **The American Bar Association**

The American Bar Association resources include an informative article by L. Rush Hunt entitled "Planning Your Death". The article includes links to various checklists and forms that may help guide you in considering a well written comprehensive estate plan:

[https://www.americanbar.org/content/newsletter/publications/gp\\_solo\\_magazine\\_home/gp\\_solo\\_magazine\\_index/planning\\_death.html](https://www.americanbar.org/content/newsletter/publications/gp_solo_magazine_home/gp_solo_magazine_index/planning_death.html)

### **Oregon Health Decisions – Advance Directive**

Oregon Health Decisions (OHD) is an independent, nonprofit 501(c)3 organization based in Tualatin, Oregon. Their mission is to educate and empower Oregonians to better understand their choices for final health care, talk with their loved ones about their decisions, and legally document their wishes in an Advance Directive. OHD provides materials and education to help people make better-informed decisions about their future health care needs and wishes.

Completing an Advance Directive for Healthcare is one of the most important steps you can take to prepare you and your loved ones to make crucial decisions about your final health care choices. When family members know your wishes they can stand by them and doctors will respect them.

The OHD Advance Directive Workbook is a comprehensive tool that will assist you and your family in understanding and planning end of life care decisions. It includes a current Oregon Advance Directive Form:

<https://oregonhealthdecisions.org/>

### **Christian Preamble /Family Blessing**

You may wish to add a Christian Preamble or Family Blessing to your will. A preamble or letter is a personal statement of your Christian faith and shares the gift of your faith as a witness to others. A Christian Preamble may be as simple or detailed as you desire. Although some people choose to write their own, there are many resources that provide examples of Christian Preambles. Below is a link to the Evangelical Lutheran Church in America workbook that includes a sample of Christian Preamble. Our office is happy to provide additional examples.

ELCA Will and Trust Workbook:

[http://download.elca.org/ELCA%20Resource%20Repository/Will\\_and\\_Trust\\_Workbook.pdf](http://download.elca.org/ELCA%20Resource%20Repository/Will_and_Trust_Workbook.pdf)

---

We hope you find these resources useful and informative. Please call our office or email our Estate Planning Paralegal, Olivia Marovich, if you have any questions or if we can be of additional service:

Schroeder Law Offices, P.C. 503-281-4100

[O.marovich@water-law.com](mailto:O.marovich@water-law.com) [www.water-law.com](http://www.water-law.com)



"We Do EVERYTHING Water"

**Laura A. Schroeder**  
Shareholder

(800) 574-8813 (o) (503) 887-4753 (c)  
[schroeder@water-law.com](mailto:schroeder@water-law.com)



"We Do EVERYTHING Water"

**Olivia V. Marovich**  
Paralegal

(503) 281-4100  
[o.marovich@water-law.com](mailto:o.marovich@water-law.com)

