

QUESTIONNAIRE FOR REVOCABLE FAMILY TRUST
(Long Form)

Name: (Husband) _____ Phone # H: _____
Address: _____ Phone # W: _____
_____, Oregon 97 _____
DOB: _____ Citizenship: _____
SS# _____ Education: _____
General Health: _____
Employment History: _____

Present Spouse's Name: _____ Phone No.: _____
DOB: _____ Citizenship: _____
SS#: _____ Education: _____
General Health: _____
Employment History: _____

What is the approximate gross value of your estate including life insurance?
\$ _____

Husband:

Have you ever been married before? If yes, state the circumstances of the termination of that marriage and whether you owe any support to your former spouse? If so, how much and what are the terms? _____

Do you have any children by any prior relationships, marital or otherwise? _____
If the answer is Yes, please list names, birthdates, and if you have custody of that child.
1. _____
2. _____
3. _____
4. _____

If you have custody (now or in the future), who would you like to be the children's guardian if their mother is unavailable? (Do not name a married couple; their marriage may be dissolved)
1. _____
(name) (Address)
2. _____
(name) (Address)

Are any of these children adopted? _____ If yes, please indicate if you want adopted children treated the same as natural children. Yes/No Do any of these children receive any state or federal aid for any disability? Yes/No

Wife:

Have you ever been married before? If yes, state the circumstances of the termination of that marriage and do you owe any support to your former spouse? If so, how much and what are the terms? _____

Do you have any children by any prior relationships, marital or otherwise? _____
If the answer is Yes, please list names, birthdates, and if you have custody of that child.

1. _____
2. _____
3. _____
4. _____

If you have custody (now or in the future), who would you like to be the children's guardian if their father is unavailable? (Do not name a married couple; their marriage may be dissolved.)

1. _____
(name) (Address)
2. _____
(name) (Address)

Are any of these children adopted? _____ If yes, please indicate if you want adopted children treated the same as natural children. Yes/No Do any of these children receive any state or federal aid for any disability? Yes/No

Husband: You are presently married to _____. Do you and your present wife have a Prenuptial Agreement? Yes/No If yes, please provide a copy of that Prenuptial Agreement to Mr. Hattenhauer.

Children with your present spouse:

1. _____ Age: _____
(name)
_____ Married: Yes/No
(Street address)
_____ Employment: _____
(City and State)
If they have children: _____ Date of Birth: _____
(name)
_____ Date of Birth: _____
(name)
_____ Date of Birth: _____
(name)
_____ Date of Birth: _____
(name)

(City and State)

If they have children: _____ Date of Birth: _____
(name)
_____ Date of Birth: _____
(name)
_____ Date of Birth: _____
(name)
_____ Date of Birth: _____
(name)

6. _____ Age: _____
(name)
_____ Married: Yes/No
(Street address)
_____ Employment: _____
(City and State)

If they have children: _____ Date of Birth: _____
(name)
_____ Date of Birth: _____
(name)
_____ Date of Birth: _____
(name)
_____ Date of Birth: _____
(name)

Are any of these children adopted? Yes/No If yes, please indicate if you want adopted children treated the same as natural children. Yes/No

Are any of these children receiving federal or state aid for any disability? Yes/No

If any of your children are minors, other than your spouse, who would you like to be the guardian of any of these children if you should die?

1. Name: _____
(Do not name a married couple. Their marriage may be dissolved.)

Address: _____

Phone: () _____

2. Name: _____
(Do not name a married couple. Their marriage may be dissolved.)

Address: _____

Phone: () _____

Who is to be the Trustee for any Trust set up for any of these children? You should be advised that I usually put a health, education and welfare trust in the Trust for any child that is less than the age of 30, and therefore I will need two Trustees of that trust.

1. Name: _____

(Do not name a married couple. Their marriage may be dissolved.)

Address: _____

Phone: () _____

2. Name: _____

(Do not name a married couple. Their marriage may be dissolved.)

Address: _____

Phone: () _____

If you are married, the typical trust I prepare is a joint trust. A joint trust is usually easier for a married couple to manage. It continues after the death of a spouse. Initially, both husband and wife are Trustees. The survivor continues as Trustee. After the survivor dies, it is necessary to nominate a successor. Who do you wish to serve as the successor Trustee for your estate plan? A successor Trustee is the person who organizes your affairs after your death. The successor Trustee marshals the assets, pays the estate debts and then distributes the remainder as you have set forth in your Will. Usually a trusted family member is nominated first. Is that what you wish? Yes/No Please name two individuals to serve, or at least one, if your spouse will be named first.

1. Name: _____

Address: _____

Phone: () _____

2. Name: _____

Address: _____

Phone: () _____

Do you want a Durable Power of Attorney? Yes/No (A Durable Power of Attorney is a document that permits your spouse, or whoever you name to receive this power, and I recommend that it be your spouse, to sign your name to legal documents when you are absent.)

Do you want a machine or other artificial means to keep you alive if you are unconscious and are not going to make a recovery? Yes/No If the answer is Yes, who do you want to have the authority to "pull the plug" on the machine? _____

The typical answer is spouse, then a trusted loved one. If it is other than spouse, please contact Mr. Hattenhauer. Presuming you want an Advance Directive, I need the full name and address of both people that you name.

1. Name: _____
 Address: _____
 Phone: () _____

2. Name: _____
 Address: _____
 Phone: () _____

Testamentary Plan. A typical testamentary plan is one where you leave everything to your spouse if they survive you, and, if they don't, everything to your children. Some people like to make specific gifts of family heirlooms to either their children or a child from some other marriage/relationship or specific bequests to charitable institutions, such as churches or schools. Please write down for me where you would like your estate to go upon your death. If your estate only involves yourselves and minor children, please direct where it should go if you and your spouse and your minor children are all killed in the same catastrophic accident.

- Residue: Number of shares: _____
1. _____ shares
 2. _____ shares
 3. _____ shares
 4. _____ shares
 5. _____ shares
 6. _____ shares
 7. _____ shares
 8. _____ shares

Specific bequests:

_____ to _____
 _____ to _____
 _____ to _____

If there is something that you think is important for you to tell me that I have not asked in this document, please write it here.

If you have any questions about what is in this questionnaire or how it should be filled out, please call Mr. Hattenhauer at (503) 226-3221.

