



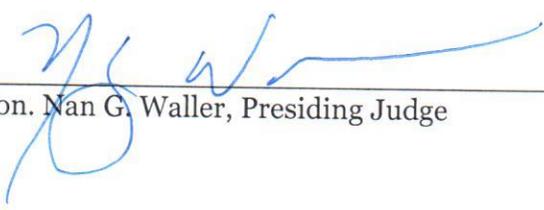
4. The purpose of the bond and letters testamentary/letters of administration;
5. Explanation of Notice to heirs, devisees and interested parties and how to marshal assets;
6. A review of the requirements of publication, notice to creditors and payment of creditors;
7. Explanation of what assets need to be included in the inventory and deadlines for filing and how to identify probate verses non-probate assets;
8. A review of how to determine validity of claims, and the time limits regarding claims;
9. A discussion of the process for estate distribution, including an explanation of court authority and the importance of keeping clear records.
10. A review of the process for closing the estate and common timelines

#### C. FOR TRUSTEES

1. Introduction to the Oregon Statutes that define the roles of trustees and responsibilities to the protected person/beneficiaries and the Court;
2. Explanation of the reasons why someone would create a trust;
3. Definition of key words in the trust document and explain revocable, irrevocable, testamentary, special needs trusts;
4. A review the importance of the trust document in making decisions;
5. Explanation of what to do if the trust document is unclear or there is disagreement;
6. Instructions for how to recognize which actions require Court approval and which do not;
7. Practical tools for tracking diverse duties, tracking timelines, and record keeping duties;
8. Clear instruction regarding expectations regarding ethical behavior for trustees;
9. Tips on using attorney time well, meeting Court expectations, and working with advocates and caregivers involved with the protected;
10. Explanation of what to do if the job is too much for the trustee;

This order is effective until superceded by further court order.

Signed this 3<sup>rd</sup> day of March, 2015

  
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Hon. Nan G. Waller, Presiding Judge