

ESTATE PETITION (ORS 113.035)

(Requirements that apply ONLY to testate estate are in **bold**)

Decedent's Name: _____ **Case No.** _____ **DOD:** _____

- Small Estate Exists
 - Data entry on small estate completed and case related to full estate
- Out of State Estate Exists
 - Proof of Primary Probate – certified copies of **WILL** & Order (ORS 113.065)
- Wrongful Death Only?
 - ORS 114.453(1) Statement wrongful death only
 - ORS 114.453(2) Names, relationship, and addresses of beneficiaries
- Original Will (date: _____) Codicil?** (date: _____)
 - Intestate Estate
- Affidavit of Witnesses** (ORS 113.055)
- Venue
- Information re: decedent PR heirs **devisees**
- Statement that reasonable efforts have been made to locate heirs [ORS 113.035(6)] and beneficiaries if wrongful death only [ORS 114.453(3)]
- ORS 113.035(8): Persons asserting interest based on will ineffective, another will exist, or promise to make/revoke will, not make/revoke will, or die intestate.
- ORS 113.035(9): Person asserting interest based on contention that a parent willfully deserted or neglected decedent.
- Personal Representative(s) **per Will** or per ORS 113.085
 - PR is Sole Heir
- Alternate Personal Representative(s):**
 - Consents/Declinations
- Bond/Restrictions
 - Amount of Bond\$ _____
 - Amount of Restricted Property \$ _____
 - Verification of Restriction?
 - Bond Waived in Will?** Yes No
 - Bond Waived by Consent? Yes No
 - If yes, statement of no creditors?
- Initial Estate Value: \$ _____

NOTES:

Date of Initial Review: _____ **By:** _____ **(Initials)**

