

ESTATE PETITION (ORS 113.035)

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

Decedent's Name: _____ **Case Number:** _____

_____ 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** (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 Witness (113.055)**

_____ Venue

_____ Information re: ___ decedent ___ PR ___ heirs ___ **devisees**

_____ Statement that reasonable efforts have been made to locate heirs [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 exists, 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 (Circle One)**
_____ Bond Waived by Consent? Yes / No (Circle One)
_____ If yes, statement of no creditors?

_____ Initial Estate Value: \$ _____

Notes: _____

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

