

DO NOT NOTARIZE THIS FORM
REVOCABLE TRUST WORKSHEET

First Contact Date: _____ FAWN CHESHEWALLA Completion Date: _____
FAX: 918-287- 5693 clcheshewalla@osage-tribe.org Phone: 918-287-5433

Mailing: P.O. Box 779, Pawhuska Oklahoma 74056
FOR OFFICE USE ONLY – DO NOT WRITE ABOVE THIS AREA

SECTION A

1. Do you have a C.D.I.B. card proving you are Osage? (Circle) Yes or No
2. Are you Osage (Circle) Yes or No
3. Adopted? (Circle) Yes or No
4. Own Restricted Land? (Circle) Yes or No
5. Complete the following if known Headright % _____ Annuitant # _____
6. Was Headright left to you in a (Circle) Life Estate or outright?
7. Your Name: _____ - _____
8. Your Street or P.O.Box number: _____
9. City: _____ State: _____ Zip: _____
10. Telephone (____) _____
11. Social Security#: _____
12. Date of Birth: _____ / _____ / _____

SECTION B

List of Beneficiaries: Who Receives What?
Keep in mind you can only leave a life estate to a non-Osage once,
the next heir must be an Osage!

1. Life Estate: (this usually is for a spouse or partner to use for their lifetime)

Name: _____ Osage? (Circle) Yes or No
Address _____
City / State resides _____ Relationship: _____
Comment: _____

.....
2. Upon death of Life Estate recipient:

Name: _____ Osage? (Circle) Yes or No
Address _____
City / State resides _____ Relationship: _____

Comment: _____

.....

Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____

.....

Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____

.....

3. Heirs to receive Outright

Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____

.....

Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____

.....

Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____

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Comment: _____
.....

Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____
.....

4. Adopted children: Provide proof of adoption:

Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____
.....

Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____
.....

5. Disinheritance: (example- To my son/daughter I leave all my love and affection)

This prevents your trust from being challenged due to omission of a child.

Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____
.....

Disinheritance: (example- To my son/daughter I leave all my love and affection)

This prevents your trust from being challenged due to omission of a child.

Name: _____ Osage? (Circle) Yes or No

Address _____
.....

City / State resides _____ Relationship: _____

Comment: _____

.....
6. Predeceasing a beneficiary causes a remainderman. You have choices; consult the instructions for examples. If you have questions please call me. No heirs? You can leave it to any Osage Indian. You cannot leave it to a church, foundation or non-human. Be specific on what you want. List beneficiaries below:

Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____

.....
Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____

.....
Name: _____ Osage? (Circle) Yes or No

Address _____

City / State resides _____ Relationship: _____

Comment: _____

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Address _____

City / State resides _____ Relationship: _____

Comment: _____

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