

Based on Appendix 8  
(Neb. Ct. R. Chapter 6, Article 14)  
CC 15:4 New 08/16  
Neb. Ct. R. §6-1464

**PERSONAL AND FINANCIAL  
INFORMATION OF PARTIES FOR  
ESTATES AND TRUSTS**

**THIS DOCUMENT IS CONFIDENTIAL AND SHALL NOT BE MADE PART OF THE COURT  
FILE OR PROVIDED TO THE PUBLIC PURSUANT TO [NEB. CT. R. § 6-1464](#).**

IN THE MATTER OF

Case No. \_\_\_\_\_

\_\_\_\_\_.

**PERSONAL AND FINANCIAL  
INFORMATION OF PARTIES FOR  
ESTATES AND TRUSTS**

**TO THE PERSONAL REPRESENTATIVE OR TRUSTEE: This form is to be filed only with the Court.  
Do not send this form to the interested parties. Fill out one form for each deceased or settlor.**

Full Name of the Deceased or Settlor:	Full Date of Birth of the Deceased or Settlor:	Full Social Security Number of the Deceased or Settlor:

**FINANCIAL INFORMATION OF THE DECEASED OR SETTLOR**

NAME AND ADDRESS OF FINANCIAL INSTITUTIONS

FULL ACCOUNT NUMBER(S)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

\_\_\_\_\_  
Signature (s)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name(s)

\_\_\_\_\_  
Street Address/P.O. Box Number

\_\_\_\_\_  
Bar Number and Firm Name (attorneys only)

\_\_\_\_\_  
City/State/ZIP Code

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Email Address

**Instructions:** When parties are required to report personal and financial information to the court, the complete information shall be provided on Appendix 8. On pleadings or documents to be filed with the court, financial account numbers, dates of birth, and Social Security numbers, where required, should reference Appendix 8: (i.e., "See Appendix 8"). Financial account numbers should be listed by the last four digits of the financial account when the account is reported on a pleading or document filed with the Court.