

PRECEDENT:

Instructions for Will

INSTRUCTION SHEET – Please complete the following questionnaire and return as soon as possible.

Date _____ Place _____ Taken by _____

Your Name and Address _____

Occupation _____

Particulars of any instructions as to Funeral/Grave/Arrangements

Have you any previous will? Yes/No _____ Where held _____

Executors/Trustees/Guardians: _____

Names _____

Addresses and Occupations _____

What is your Marital Status

Married Single Separated Widow/er Divorced

Husband's/Wife's name _____

Date of marriage _____

If Divorced, name(s) and address(es) of former spouse(s) _____

Details of Separation Agreements/Separation Orders/other Family Law Orders, e.g. maintenance, custody, barring, access, pension adjustment orders, inheritance blocking orders _____

Children (present ages in brackets) _____

Natural/Adopted _____

Other Close next of kin/dependents _____

Particulars of Assets (with approx. values) – and include location addresses, account numbers, references, etc.

Liabilities _____

House and Contents _____

(Location of Deeds) _____

Shares _____

Bank Accounts _____

Joint Property _____

Settled Property _____

Pension Scheme Benefits _____} (Any reference) _____

Section 60 Policies _____}. (required in Will?) _____

Life Assurance _____

Location of Policy Documents _____

Note: Continue list on separate sheet if appropriate give details of all assets in Ireland and elsewhere in which Testator had an interest.

What do you want to do in your Will? Please give full details and indicate name(s), Address(es), occupation(s) and age(s) (approximately) of Beneficiary(ies).

If, for any reason, you are not including dependents (spouse's right/provision for children) please say why _____

Have you previously made gifts to beneficiaries who will benefit under the proposed Will?

Give details

Have appropriate returns been made to the Revenue in respect of previous gifts/inheritances? (Particulars on a Separate Sheet).

Have beneficiaries under proposed will received other gifts/inheritances known to Testator since 2nd June 1982?

Have you been advised of potential tax liability of proposed beneficiaries?

Has your spouse executed a Will? _____ Sole Executor – YES/NO ____

If married and if spouse/universal legatee fails to survive by one month –

Commorientes Clause. What fallback provision would you like to make?

Please state any special Bequests: (Use Separate Sheet if necessary)

(a) Jewellery, special articles _____

(b) Personal and household chattels generally Section 56 Succession Act

(c) House and immovables _____

(d) Investments etc. _____

Charitable Legacies _____

Pecuniary Legacies _____

If there is a Residue left after above please state any division of Residue _____

Correspondence to Home/Office? _____ Telephone No _____

Original will to be kept by: Solicitor at a cost of €20 per annum.