

**Personal Details:**

Name and Address:

Phone No.:

Mobile No.:

Email:

Date of Birth:

PPSN:

Married / Single / Separated / Widow(er) / Divorced / Civil Partner

Husband's / Wife's / Partner's name:

(Please provide us with copy of Divorce or Separation Order for any orders affecting rights of succession/ pension/ property)

**Children:**

Name/ Address/Age

(1)

(2)

(3)

Notes on children: Health / Education / Special needs etc.:

Adopted / Foster / Step-children / Non-Marital Children:

Any predeceased children:

Other close next of kin / dependants:

Is there a previous Will? Yes / No

**Executors (An Executor is the person you nominate to be your estate's legal representative when you die. Their main job is to apply to the High Court for a grant of probate which is the legal document required in order to deal with your estate ie sell your assets, transfer your money and pay beneficiaries. We recommend that you appoint two executors.**

**Trustees are required where you are going to set up a trust eg if you have children who are minors or who you wish to inherit later than 18. You must have two trustees and should be people you trust. Your executors and trustees can be the same people.**

I wish to appoint in my new Will:

**Executors:**

**Trustees:**

(1) Name:

(1) Name:

Address:

Address:

(2) Name:

(1) Name:

Address:

Address:

Relationship to me if any:

Relationship to me if any:

**Guardian/s to be appointed in the case of minor children**

**(Guardians are the people who have the legal right to care for your children on a day to day basis and will be involved in important decisions such as education and medical decisions etc (if there are no other guardians appointed) Again your guardians, trustees and executors can all be the same people or sometimes guardians are different to trustees.**

(1) Name:

(1) Name:

Address:

Address:

**Who do you want to leave your estate to:**

Names and addresses will be required.

Any special bequests :

Use back of this page if extra space is required.

## **PARTICULARS OF ASSETS**

We require details of any asset that you want to bequest in your Will. Otherwise we do not require details of all the assets listed below however you can complete same as a record for yourself of your assets.

- (A) Property:**
- (B) Property (other than my home)**
- (C) Any business assets that I own?**
- (D) Private company shares owned by me?**
- (E) Bank accounts etc.**
- (F) An Post**
- (G) Pension**
- (H) Life Insurance Policies**
- (I) Other property (e.g. stocks and shares)**

**JOINT PROPERTY:**

**Do you own any property / bank accounts jointly with other persons?**

**SPECIAL BEQUESTS: (USE BACK OF SHEET IF NECESSARY)**

- 1. Jewellery, special articles:**
  
- 2. Personal household contents generally:**
  
- 3. Cash / Bank accounts:**
  
- 4. House:**
  
- 5. Investments etc.**

**Residue –**

**The residuary estate is everything else which has not been specifically named above. Please note that the residuary estate can be quite valuable and great care should be given to it's distribution and may increase or decrease in value over time.**

**Who do you wish to inherit the remainder of your estate after the above disposals?**

**Please provide the name and addresses of any residuary beneficiaries.**

**Particulars of any wishes as to Funeral / Grave / Arrangements**