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WILL INSTRUCTION FORM

This should be completed to provide us with an overview of the value of your estate and your wishes. *Precise details of each asset are not required.*

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:

Other close next of kin / dependants:

Is there a previous Will? Yes / No

Executors / Trustees 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 :

(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:

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