

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 2<sup>nd</sup> 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.