



Will Guide and Instruction Form

Name:

Address:

Phone Number:

Email address:

Can a draft Will be emailed to you at this address? ☐ Y ☐ N

Marital status: ☐ never married ☐ married ☐ widowed ☐ separated
☐ legally separated ☐ divorced ☐ co-habiting

Do you have children? ☐ Y ☐ N

EXECUTORS

Choose trustworthy age appropriate people as your Executors. While one is required for a valid Will, it is advisable to appoint two. Only one needs to act for the administration. There are no restrictions on who can be your Executor. It can be a family member who is also a beneficiary. The Executors do not need to be present when the Will is being signed.

Executor 1:

Name:

Address:

Relationship to you:

Executor 2:

Name:

Address:

Relationship to you:

Assets

	Held	Nominated?
Property	<input type="checkbox"/> solely <input type="checkbox"/> jointly	
Bank account	<input type="checkbox"/> solely <input type="checkbox"/> jointly	
Credit union	<input type="checkbox"/> solely <input type="checkbox"/> jointly	<input type="checkbox"/> Y <input type="checkbox"/> N
Life policy	<input type="checkbox"/> solely <input type="checkbox"/> jointly	<input type="checkbox"/> Y <input type="checkbox"/> N
Shares		

HOW DO YOU WANT TO DISTRIBUTE YOUR ESTATE?

Name	Relationship to you	Details of gift
1.
.....
2.
.....
3.
.....
4.
.....
5.
.....
6.
.....

If any of the above people die before you, do you want their children to inherit that gift equally? ☐ Y ☐ N

Signed:

.....

Next Steps

- | | |
|---|--------------------------|
| 1. Return this form to us. | <input type="checkbox"/> |
| 2. Book an appointment online to come in to review it and sign your Will. | <input type="checkbox"/> |
| 3. Please bring: Photo ID | <input type="checkbox"/> |
| Proof of address on a utility bill or bank statement | <input type="checkbox"/> |

Previous Wills

When a new Will is validly signed, it cancels the previous Will. The prior will does not have to be destroyed. It is advisable to tell your Executor where you made your most recent Will. The original Will is stored in our office.

Fee

The fee is €184.50 per Will.

Payment is made when signing your Will at our office, by card, cash or cheque.