



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

Children

Name

Age

- | | | |
|----|-------|-------|
| 1. | ..... | ..... |
| 2. | ..... | ..... |
| 3. | ..... | ..... |
| 4. | ..... | ..... |
| 5. | ..... | ..... |
| 6. | ..... | ..... |
| 7. | ..... | ..... |

Do any of your children have special needs? Y N

Are you a guardian of any children? Y N

Do you have any foster children? Y N

Do you have any adopted children? Y N

Do you have any step children? Y N

Do any of your children have another guardian appointed to them? Y N

Have you given any of your children any gifts to date? Y N

If so, have these been in advancement of an inheritance? Y N

Are any of your children not taking a benefit under your Will? Y N

TRUSTEES - Two must be appointed

Assets have to held by Trustees for children under 18. This age can be extended. The Trustees can be same people as the Executors. The Trustees will have a different role. They will be responsible for holding the finances of the estate for the benefit of the minors while the Trust is in place. Two are required where property is in the estate. The Will is the document that creates the Trust, should both parents die with a child aged under 18. The Trustees may be the same people as your Executors and Guardians.

Trustee 1:

Name:

Address:

Relationship to you:

Trustee 2:

Name:

Address:

Relationship to you:

At that age would you like the Trust to end ?

(After 21, there are tax implications. This will be discussed with you at your appointment)

GUARDIANS

Guardians are appointed to have day to day custody and care of minor children. They can be the same people as the Trustee and Executors. Only one is required.

Guardian 1:

Name:

Address:

Relationship to you:

Guardian 2:

Name:

Address:

Relationship to you:

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.
2. Book an appointment online or over the phone to come in to review it and sign your Will.
3. Please bring:
 - Photo ID
 - Proof of address on a utility bill or bank statement
 - A copy of your title deeds or folio number
 - A copy of any family law court orders or agreements made
 - A copy of any previous Will made

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

Starts from €200.00 per Will.

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