



# 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  remarried

*\*Please bring a copy of your Separation Agreement or Divorce Order in with you*

**Name of Spouse/Partner:** .....

## 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)*

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**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: .....

**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.

If you are in a relationship, it is likely that you wish your spouse or partner to be your Executor and vice versa.

Do you want your spouse/partner to be your Executor?  Y  N

If this person pre-deceases you, then who do you wish to appoint as your Executor(s)?

**Executor 1:**

Name: .....

Address: .....

Relationship to you: .....

**Executor 2:**

Name: .....

Address: .....

Relationship to you: .....

**Assets**

Property ..... Held  solely  jointly

Bank account .....  solely  jointly

Credit union .....  solely  jointly

Is the account nominated?  Y  N

If it is nominated, who is the nominee? *Note: Nominated accounts do not come within the scope of a Will.*

Life policy .....  solely  jointly

Shares .....

Pension .....

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Is the account nominated?  Y  N

Other .....

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Please give details of a joint account holder's name or joint property owner's name. Jointly held assets do not come within the scope of a Will.

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**Liabilities**

Held

Mortgage .....  solely  jointly

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Fair Deal Loan .....

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Loans .....  solely  jointly

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**NOTES**

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**HOW DO YOU WANT TO DISTRIBUTE YOUR ESTATE?**

<b>Name</b>	<b>Relationship to you</b>	<b>Details of gift</b>
1. .... .....	.....	..... .....
2. .... .....	.....	..... .....
3. .... .....	.....	..... .....
4. .... .....	.....	..... .....
5. .... .....	.....	..... .....
6. .... .....	.....	..... .....
7. .... .....	.....	..... .....
8. .... .....	.....	..... .....
9. .... .....	.....	..... .....
10. .... .....	.....	..... .....

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
  - 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

€200 per person. Each person makes a separate single Will. The total cost for a couple is €400.

If additional documents are required for example Deeds of Renunciation, letters from doctors or affidavits, these additional documents will incur an additional cost.

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