



Will Guide and Instruction Form

Name:

Address:

Phone Number:

Email address:

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

Have you made a Will before? ☐ Y ☐ N

If so, where is the original Will located?

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

Date of Birth

1.

2.

3.

4.

5.

6.

7.

Do any of your children have special needs?	<input type="checkbox"/> Y	<input type="checkbox"/> N
Are you a guardian of any other children, not listed above?	<input type="checkbox"/> Y	<input type="checkbox"/> N
Do you have any foster children?	<input type="checkbox"/> Y	<input type="checkbox"/> N
Do you have any adopted children?	<input type="checkbox"/> Y	<input type="checkbox"/> N
Do you have any step children?	<input type="checkbox"/> Y	<input type="checkbox"/> N
Do any of your children have another guardian appointed to them?	<input type="checkbox"/> Y	<input type="checkbox"/> N
Have you given any of your children any gifts to date?	<input type="checkbox"/> Y	<input type="checkbox"/> N
If so, have these been in advancement of an inheritance?	<input type="checkbox"/> Y	<input type="checkbox"/> N
Are any of your children not taking a benefit under your Will?	<input type="checkbox"/> Y	<input type="checkbox"/> 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.

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

.....

.....

Approximate value €

Where are the Deeds located?

.....

Bank account(s)

Held
☐ solely ☐ jointly

.....

Approximate value €

Credit Union

Held
☐ solely ☐ jointly

.....

Approximate value €

Nominated?
☐ Y ☐ N

If nominated, what's the name of the nominee?

.....

Nominated accounts up to the value of €23,000 do not come within the scope of the Will. The excess over €23,000 will come into the estate and within the scope of a Will.

Life policy

Held
☐ solely ☐ jointly

.....

Approximate value €

Nominated?
☐ Y ☐ N

Shares

.....

Approximate value €

Pension

.....

Approximate value €

Other

.....

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.

.....

.....

Liabilities

Mortgage

Held
☐ solely ☐ jointly

Approximate value €

Name of Bank

Loans

Held
☐ solely ☐ jointly

Fair Deal loan

Approximate value €

HOW DO YOU WANT TO DISTRIBUTE YOUR ESTATE?

Name

Relationship to you

Details of gift

1.
.....

Should this person predecease you, who would you wish to take this gift?

.....

2.
.....

Should this person predecease you, who would you wish to take this gift?

.....

3.
.....

Should this person predecease you, who would you wish to take this gift?

.....

Should this person predecease you, who would you wish to take this gift?

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Should this person predecease you, who would you wish to take this gift?

Next Steps

1. Return this form to us. ☐
2. Book an appointment to come in to review it and sign your Will. ☐
3. Please bring: ☐
 - Photo ID ☐
 - Proof of address on a utility bill, bank statement, government document, payslip ☐
 - Separation agreement / Divorce order ☐
 - Previous Will ☐
 - Folio number or house Deeds ☐

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.

Tax Advice

Tax advice will be limited to the rates and tax-free thresholds currently in place. For more detailed tax advice, please contact a tax advisor. Details of a tax advisor can be provided, if required.

Cost

The fee is €300 per person. Each person makes a separate single Will. The total cost for a couple is €500. Payment is made when signing your Will at our office, by card, cash, cheque, online on our website, if submitting a form online, or remotely by payment link, which can be emailed to you.

NOTES
