



INSTRUCTIONS FOR MY WILL

(This should be completed to give an overview of the value of your estate and your wishes. Precise details of each asset are not required.)

PERSONAL DETAILS

Full Name

Address

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Occupation

Date of Birth

PPS Number

Instructions in relation to burial (note this should be communicated to your family as your Will may not be read until after your funeral)

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EXECUTORS AND TRUSTEES

An Executor is the person responsible for administering your estate. You can choose the number of executors you wish to appoint.

Trustees will only be required where you wish to set up a trust under the will. A trust will usually be set up where the beneficiaries are minor children or are in some way unable to manage their own affairs.

Name 1

Address

Name 2.....

Address



FAMILY AND DEPENDANTS

Spouse/Civil Partner

Children: (Names and ages)

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Other dependants, e.g. co-habiting partner, aged parent or handicapped relation:

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GUARDIANS OF MINOR CHILDREN

This may be required in the instance where both parents or guardians are not in a position to care for the children

Name 1

Address

Name 2.....

Address

DETAILS OF ASSETS

Details of family home.....

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Is this property owned jointly?

Is this property subject to mortgage?

Details of any other properties.....

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Are any such properties owned jointly?

Are any such properties subject to mortgages?

Details of financial institutions where accounts are held(e.g. banks, building societies, An Post, Credit Union etc.)

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Pension details

Life Insurance Policy details.....

Other Property details (e.g. stocks or shares).....

Location of title deeds or share certificates

