

MICHAEL MONAHAN SOLICITOR

WILLS INSTRUCTION SHEET

Date: _____ In Attendance: _____

1. DETAILS OF TESTATOR

Full Name and Address of Testator:

Occupation: _____

PPS Number: _____

Executor(s)/Trustee(s) Name(s) & Address(es):

A. _____ B. _____

2. MARITAL STATUS:

Married	Single	Widowed	Separated	Divorced
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Spouses Name: _____

Date of Marriage: _____

Children:

Forenames

Surname

Date of Birth

Has Status of Children Act 1987 been explained? Yes / No

**3.PARTICULARS OF ANY INSTRUCTIONS AS TO FUNERAL / BURIAL
ARRANGEMENTS:**

4ANY PREVIOUS WILL? Yes / No

If yes, where held? _____

**5.PARTICULARS OF ASSETS & LIABILITIES (WITH APPROXIMATE
VALUES):**

A.Liabilities:eg. Mortgage, loans etc.

(I) _____

(II) _____

(III) _____

(IV) _____

B.Houses / apartments and contents:

C.Location of Title Deeds:

D.Bank Accounts:

Name & Address of Bank	Account No.	Sort Code
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

E.Shares:

1. _____
2. _____
3. _____

F.Joint Property and how it is held:

G.Settled Property:

H.Pension Schemes:

- | | |
|----------|----------|
| 1. _____ | 2. _____ |
| _____ | _____ |
| _____ | _____ |

I.Section 60 Policies:

- | | |
|----------|----------|
| 1. _____ | 2. _____ |
| _____ | _____ |
| _____ | _____ |

J.Life Assurance Policies:

- | | |
|----------|----------|
| 1. _____ | 2. _____ |
| _____ | _____ |
| _____ | _____ |

Location of documents: _____

Any other assets (use separate sheet if necessary): _____

Property outside the State: _____

6.SUCCESSION ACT 1965

Reasons for not including dependants (spouse / children): _____

Succession Act 1965 rights explained? Yes / No

Section 117 Children and Section 117 explained? _____

If Separated, any Orders under Section 9 or Section 14 Family Law Act 1995?

If Divorced, any Orders under Section 18(10) of the Family Law (Amendment) Act 1996? _____

Any Succession Act Renunciation executed? _____

7.BEQUESTS

Name of Beneficiary _____ Bequest _____

Name of Beneficiary _____ Bequest _____

Name of Beneficiary _____ Bequest _____

Name of Beneficiary _____ Bequest _____

Name of Beneficiary _____ Bequest _____

Has Testator made gifts to beneficiaries to benefit other than under the proposed Will?

Have appropriate returns been made to the Revenue (Particulars on separate sheet). _____

Have beneficiaries under proposed will received other gifts / inheritances known to the Testator since 2nd June 1982? _____

Has Testator been advised of potential liability of proposed beneficiaries?

Spouse: Universal legatee provided survives one month: Yes / No

Has Spouse executed Will: Yes / No

Sole Executor: Yes / No

Special Bequests: (Use Separate Sheet if necessary)

Jewellery / special items: _____

Personal and household chattels (section 56 1965 Act): _____

House and immovables: _____

Investments etc: _____

Charitable legacies: _____

Pecuniary legacies: _____

Residue: _____

Provision to avoid lapse of residue: _____

Settlement of residue – children – income – 21/25 – Capital 21 – 25 _____

Powers of trust involved – investment / advance / lend / borrow / apportionment / appropriation / manage land / run business / etc.

Charging clause? If professional executor / trustee: Yes / No

Non application of section 63 Succession Act 1965? Yes / No

8. SPECIAL QUERIES

Farm Property? _____

Powers of Appointment? _____

Will to be engrossed / drafted? _____

Draft to go for approval to Testator / Bank / Accountant? _____

If testator's Accountant / Valuer to be consulted re any values has this been done? Yes / No.

Correspondence to Home / Office? _____

Telephone Number for Correspondence? _____

Original Will to be kept by? _____

Costs quoted? _____

Signed/ _____