

Full Name and Address

Former Address

Date of Birth

PPS (RSI) Number

Occupation

Residence

Domicile

Particulars of any instructions as to Funeral / Grave / Arrangements

Is there a previous will? Yes / No.

Where held?

Executors / Trustees:

More than one, Name and

Relationship to Testator if Any

Addresses

Martial Status of Testator

Married / Single / Separated / Widow / er / Divorced

Husband's / Wife's name

Date of marriage

(Check copy of divorce or separation agreed or order for any matters affecting rights of succession or orders affecting pension or property)

Children

Names and Address

(present ages in brackets)

Notes on children

Adopted / Foster / Step-Children / Non-Marital Children

Other Close next of kin / dependants

Advice given on s98 Succession Act and instructions are as follows.

Advice given on s 63 of Succession Act and instructions are as follows.

Explanation of Provisions of Status of Children Act, instructions are as follows:

Particulars of Assets (with approx. values) - and include liabilities thereon

House and Contents

(Location of Deeds)

Shares, Attach list of possible. (Location of share certificate)

Bank Accounts

Joint Property

Settled Property

(Any reference)

Pension Scheme Benefits }

(Required in Will?)

Section 72 (60) Policies }

Life Assurance

Location of Policy Documents

Testator's Accountant / Valuer

Name / Address

(This is needed for example for valuation of shares / income tax queries)

Note: Continue list on separate sheet if appropriate give details of all assets in Ireland and elsewhere in which Testator had an interest.

Reasons for not including dependents (spouse's rights / provision for children)

Succession Act rights explained re spouse?

If separated, any Orders under Section 9 or Section 14 of the Family Law Act, 1995?

If divorced, any Orders Under Section 18 (10) of the Family Law (Amendment) Act, 1996?

Any Succession Act Renunciation executed? If so where is same

Advice given on s 117 of Succession Act if applicable and instructions are as follows.

Capital Acquisitions Tax:

Note gifts / inheritance pre 5 December 1991 free of CAT: Those as from that date aggregated under the new system. (Assuming death after 5 December 2001).

Has testator made gifts to beneficiaries who are to benefit under the proposed Will?

Give details

If so have appropriate returns been made to the Revenue? (Particulars on a Separate Sheet)

Have beneficiaries under proposed will received other gifts / inheritances known to Testator by anybody else?

Has the Testator been advised of potential tax liability and or possible exemptions of proposed beneficiaries?

Has the testator been advised of possible exemptions of any asset which attracts same? e.g. Farmland

Terms of Will

Spouse: Universal legatee provided survives one month - YES / NO

Has spouse executed Will?

Sole Executor - YES / NO

N.B. If spouse universal legatee set out provisions to apply if spouse fails to survive by one month - Commorientes Clause.

Special Bequests: (Use Separate Sheet if necessary)

- (a) Jewellery, special articles
- (b) Personal and household chattels generally
Section 56 Succession Act
- (c) House and immovables
- (d) Investments etc

Charitable Legacies

Pecuniary Legacies

Residue

Is there any division of 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.

Charge (if professional executor or trustee)

Special Queries

Power of Appointment?

Is a Trust Needed?

Trustees?

Trust Fund?

Beneficiaries?

Most appropriate type of Trust? E.g. Trust for Sale? Discretionary / Fixed Trust?

Ultimate Default Trust?

Terms of Retainer