

Eoin O'Connor and Company Solicitors

CLIENTS INSTRUCTION SHEET FOR DRAFTING A WILL

FULL NAME AND ADDRESS:

FORMER ADDRESSES:

DATE OF BIRTH:

_____ PPS

NUMBER:

OCCUPATION:

MARRIED/SINGLE/SEPARATED/WIDOW/DIVORCED: _____

_ HUSBAND'S/WIFE'S NAME:

_____ PARTICULARS OF

ANY INSTRUCTIONS AS TO FUNERAL/GRAVE/ARRANGEMENTS: _____

DO YOU HAVE A PREVIOUS WILL? YES/NO IF YES, WHERE IS IT HELD?

_____ WHO DO YOU WISH TO

BE THE PERSON RESPONSIBLE FOR YOUR AFFAIRS AFTER YOUR DEATH?

YOUR RELATIONSHIP TO THE ABOVE PERSON?

CHILDREN NAMES ADDRESSES AGES

NOTES ON CHILDREN ADOPTED/FOSTER/STEP-CHILDREN/NON-MARITAL

CHILDREN: _____ OTHER CLOSE NEXT OF KIN/DEPENDANTS:

_____ PARTICULARS OF ASSETS:

LIABILITIES:

HOUSE AND CONTENTS:

LOCATION OF DEEDS:

_____ SHARES:

BANK ACCOUNTS:

JOINT PROPERTY:

PENSION SCHEME BENEFITS:

LIFE ASSURANCE: YES/NO IF YES LOCATION OF POLICY DOCUMENTS:

_____ **ACCOUNTANT: YES/NO IF YES NAME**

AND ADDRESS: _____

IF CHILDREN/SPOUSE NOT INCLUDED IN WILL PLEASE SET OUT REASONS FOR YOUR DECISION:

**HAS SPOUSE EXECUTED WILL? YES/NO WOULD YOU LIKE TO CONSIDER LEAVING MONEY/ITEMS TO
A PARTICULAR CHARITY? YES/NO IF YES, NAME AND ADDRESS OF THE CHARITY**

YOUR INSTRUCTION AS FOR DISTRIBUTION OF YOUR ESTATE?