

WILL QUESTIONNAIRE

This Will questionnaire is designed as a guide to help you prepare for questions your solicitor will ask at your appointment. If you are unsure about any of the questions, your solicitor will be happy to discuss them with you.

1. You

Full Name:..... **Date of Birth:** / /

Address:
..... **Eircode:**.....

Telephone Number: (Home)..... (Mobile)

Marital Status: Single Divorced Engaged Remarried Married Widowed Separated

2. Your Spouse

Full Name:..... **Date of Birth:** / /

Address:
..... **Eircode:**.....

Telephone Number: (Home)..... (Mobile)

Marital Status: Single Divorced Engaged Remarried Married Widowed Separated

3. Children

Full Name	Address	Date of Birth

4. Do you have an existing Will?

You: **Yes** **No**

Your Spouse: **Yes** **No**

5. Nominated Guardians for any children yet to reach adulthood.

Full Name	Address

6. Estimated Asset Value

Your home (please confirm if you Own this in your sole name or jointly)	<input type="text"/>
Other property or land	<input type="text"/>
Cars and other vehicles	<input type="text"/>
Home contents including furniture & fittings	<input type="text"/>
Items of particular value (e.g. jewellery or art)	<input type="text"/>
Money in Banks and Building Societies	<input type="text"/>
Other savings and assets	<input type="text"/>

9. Name of Executors

Name of Executors: (1)

(2)

Address of Executors: (1)

.....

(2)

.....

Relationship with you: (1)

(2)

*You can appoint one Executor but we would recommend two. The Executors need to be over eighteen and of sound mind.

10. Legal Meanings

These are some of the words and terms you might encounter when making your Will .

Administrator

A person appointed by law to finalise your affairs if you die without leaving a Will.

Beneficiary

Anyone who receives something from your Will.

Bequest (also often called a legacy)

A gift in a Will. Gifts are normally pecuniary (a specific sum of money), residuary (generally stated as a percentage share of what is left after all other gifts have been made) or specific (a particular item or property).

Codicil

An addition or amendment to an existing Will.

Estate

The total value of everything you own at your time of death, minus any outstanding commitments.

Executor

A person you appoint to make sure the wishes stated in your Will are carried out.

Guardian

A person appointed by a parent to look after their children in the event of their death before the children reach adulthood.

Intestacy

The situation that exists if you die without a valid Will.

Inheritance Tax

A tax levied at the value of your estate.

Probate

The process that determines whether your Will is valid. Once your Will has been probated then the executors can distribute your estate.

Testator (male) and Testatrix (female)

The person making the Will.

Trust

A provision can be out in your Will to treat part of your assets in a particular way after your death.