INSTRUCTION QUESTIONNAIRE FOR WILL

Client

1. Date:	
2. Full Name and Address:	
3. Occupation:	
4. Particulars of any instructions as to funeral/grave arrangements:	
5. Any previous Will? Yes/No	If yes, where held: Note: A new Will usually includes a clause which revokes the "old" Will.
6. Executors Names and Addresses:	
7. Trustees (if different from Executors) Names and Addresses:	
8. Guardians of Minor/Dependent Children Names and Addresses:	
9. Husband/Wife's Name:	
10. Date of Marriage:	
11. Children: (full name and date of birth)	
12. Other close next of Kin/dependents:	

13. Particulars of Assets (with approx values) – and	
include liabilities	
Note: Continue List on separate sheet if necessary – give details of all assets in Ireland and elsewhere in which Testator has an interest.	Joint Property:
	Settled Property:
	Pension Scheme Benefits:
	Life Assurance:
	Business:
	Farm:
14. (a) Reasons for not	
including dependants (Spouse's legal	
right/provision for children)	
(b) Separation?	
(c) Any Succession Act Renunciation executed?	

15. (a) Have you already made gifts to beneficiaries to be named in the proposed Will?	
If so give details	
(b) Have appropriate returns been made to Revenue? (Particulars on separate sheet if necessary)	
16. (a) Have beneficiaries under proposed will received other gifts/inheritances known to you since 2 nd June 1982? (b) If so give details	

17. Specific Bequests: (Give name of beneficiary and relationship to you and details of property and assets) to be left to each beneficiary: (a) Jewellery, special articles (b) Personal and household chattels generally (c) House and immovables (d) Investments etc	
18. Charitable Legacies:	
19. Pecuniary Legacies:	
20. (a) Residue (i.e. balance of estate after specific legacies) (b) Any division of Residue? (c) Trust of Residue for children? (d) Trust until what age?	

21. Correspondence to	
Home/Office?	
Telephone No: Original Will to be kept by Solicitor/Client/Bank/Other	
22. Any Special	
Requirements?	
Please use separate page if necessary.	