



Considerations when making a will

Full name of yourself/partner/spouse

Full name and date of birth of children

Date of birth _____

Date of birth _____

Date of birth _____

Date of birth _____

Are you intending to marry in the near future?

Yes

No

How is your home owned?

Sole Name

Joint Name

Do you have any business assets? If so, whose name are they in?

Make a list of all your assets and approximate value, together with any outstanding liabilities.

Do you have in mind who you would like to appoint as Executors of your Will?

Do you wish a partner of A & S Ireland to be Executor and/or Trustee?

Yes

No

If your children are under the age of eighteen, who would you like to appoint as their guardians?

Do you have any items you wish to bequeath?

Yes

No

Do you wish to leave any gifts of money to anyone?

Yes

No

Do you wish to have any specific charities that you would like to benefit?

Yes

No

Have you thought how much your estate is likely to be valued at when you die and, if so, has this any inheritance Tax implications for the beneficiaries?

Yes

No

Who would you like to bequeath your Residue to?

Yes

No
