

MAKING A WILL CHECKLIST

Summary of items to consider
when calling to your solicitor to make a Will

FAMILY CIRCUMSTANCES

- Are you Single/Married/Co-habiting Partner/Divorced/Separated?
- What is your occupation?
- Have you children or other dependants?
- Do any of your dependants have special needs?

FAMILY HOME

Is your home:

- Owned?
- Rented?
- Mortgaged?

OTHER PROPERTY

- Do you own other property?
- Is that residential/commercial/land?
- Do you lease or rent property?
- Do you own property abroad?
- What are the approximate values?

MONEY

- Do you have savings?
- Do you have Loans?
- Have you details of all Banks/Post Office(Ireland State Savings)/Credit Union(nominations)/Prize Bonds?

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INCOME

What is your current status?

- Employed
- Self-employed
- Employed + Self-Employed
- Retired

PENSIONS

What pensions do you have in place?

- Private Pension
- Occupational Pension
- Are you, or will you be, in receipt of an Old Age Pension?
- Is your pension contributory or non-contributory?
- Are you in receipt of a pension from abroad? UK/USA etc.?

LIFE POLICIES

- Do you have a Life Insurance policy/policies?
- Are these policies adequate?

INVESTMENTS

- Do you have Stocks or Shares?

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INSURANCES

What Insurance policies do you hold?

- House/Buildings other policies
- Personal Health Insurance
- Do you have a medical card?

ADVISORS

What are the contact details of your:

- GP
- Accountant
- Financial Advisor
- Agricultural advisor

OTHER INFORMATION

Is there any further information you believe needs to be considered in the making of your Will?