

Are you interested in making a Will?

Please take the time to fill out this questionnaire and Martina

or any of her staff will be more than happy to meet with you

to discuss any queries that you may have.

Wills Check List

If you are thinking of making a Will we, at MM Family Law Solicitors, require certain information. You must understand that if we are to properly advise you, we must ask questions about your personal assets and finances. Once this form is complete, please call us to arrange an appointment and we will be happy to answer any queries you may have.

The information we need is as follows:

1. State your name and full residential address.

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1. State your occupation and work address.

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1. State your date of birth.

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1. State your PPS number

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1. Home telephone number.

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1. Work telephone number.

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1. Mobile number.

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1. E-mail address.

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1. Are you over eighteen years of age? Yes\No

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1. Are you married? Yes\No

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1. Spouses name?

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1. Have you Children? If so state each of their names and dates of birth.

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1. Are you separated or divorced? If so, please state the dates upon which the separation and\or divorce occurred.

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1. If separated or divorced, are there any Court Orders in existence?

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1. Have you decided upon an Executor or Executors? These are people over eighteen years of age, who need not be members of your family, but on whom you will rely to ensure that your Will is properly dealt with after your death and that all of the assets are protected and the bequests fulfilled. You need a minimum of one but we would usually recommend two. Please state the names and addresses of your preferred choices.

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1. We will need details of the people whom you wish to benefit – if it is mostly family, then taxation problems may not arise due to the reasonably generous reliefs that are available. However, if you wish to provide a benefit for non family members, certain issues could arise. In either case, a full discussion will be necessary and we invite you to contact us in this regard.

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Please note that any instructions that you may have with regard to burial should be communicated to your family/friends, as your Will shall not be read until after your funereal.

It is recommended that you make a note of your personal assets including bank and post office account details, pensions, life insurance, shares etc. This can be kept with a copy of your Will amongst your own personal documents.

My previous Will (if any) is with: …………………………………………………………………………………

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