



GET A QUOTE MAKING A WILL CLIENT QUESTIONNAIRE

WE WILL NEED TO CONTACT YOU

Please give us the following contact details:

Name*: [*mandatory]

Email*: [*mandatory]

Phone:

Postal address:

PERSONAL DETAILS

1. WHAT IS YOUR MARITAL/CIVIL STATUS?

Single

Married

In a civil partnership

Divorced/civil partnership dissolved

Widow/surviving civil partner

Cohabiting

Other, please explain:

2. HAVE YOU BEEN SEPARATED, DIVORCED OR HAD A CIVIL PARTNERSHIP DISSOLVED?

Yes No

3. IF SEPARATED, DIVORCED OR HAD A CIVIL PARTNERSHIP DISSOLVED, WAS THE SEPARATION, DIVORCE OR DISSOLUTION OBTAINED IN IRELAND?

Yes No

YOUR ASSETS

4. WHAT ASSETS DO YOU HAVE? PLEASE INDICATE IF THE ASSET IS IN YOUR SOLE NAME:

House/apartment	Sole name	Jointly with others
Land	Sole name	Jointly with others
Pension schemes	Sole name	Jointly with others
Life policies	Sole name	Jointly with others
Shares	Sole name	Jointly with others

Other, please explain:

5. DO YOU HAVE ANY ASSETS THAT ARE OUTSIDE THIS JURISDICTION – FOR EXAMPLE, A HOLIDAY HOME ABROAD?
Yes No
6. WHAT IS YOUR ESTIMATE OF THE VALUE OF YOUR ESTATE?
Less than €500,000
€500,000 to €1 million
More than €1 million

(This information is important to indicate to us whether tax advice will be needed.)

YOUR DEPENDANTS (SPOUSE/CIVIL PARTNER AND CHILDREN)

7. DO YOU HAVE CHILDREN?
Yes No
8. IF YES, HOW MANY CHILDREN ARE UNDER 18 YEARS?
9. IF YES, HOW MANY CHILDREN ARE OVER 18 YEARS?
10. DO YOU NEED TO MAKE SPECIAL ARRANGEMENTS FOR A SPOUSE/CIVIL PARTNER OR ANY CHILD WHO IS LIVING WITH A DISABILITY?
Yes No
11. HOW MANY BENEFICIARIES ARE THERE LIKELY TO BE?
12. PLEASE LET US KNOW ANYTHING ELSE ABOUT YOUR CIRCUMSTANCES OR ASSETS THAT YOU BELIEVE WOULD BE IMPORTANT FOR US TO KNOW AT THIS POINT. FOR INSTANCE, ARE YOU CONCERNED THAT THERE WILL BE DISPUTES IN THE FAMILY ABOUT THE TERMS OF THE WILL?

DISCLAIMER

Our quotation for professional fees will not include additional work that might arise from your particular circumstances.

Examples would include the following, but there could also be other additional work:

- Preparation of an enduring power of attorney document to provide for decisions to be made on behalf of the person making the will, should they develop dementia. (A separate quotation for this work can be provided, on request.)
- Work related to establishing whether the individual making the will has the necessary mental capacity to do so. This might include consulting with a medical practitioner.
- Taxation advice.
- If the person making the will has been separated, divorced or had a civil partnership dissolved, advice relating to the succession rights of former spouses/partners, including their entitlements to pensions or property of the person making the will.
- Wills involving businesses.
- Wills involving farms.
- Wills involving trust* property.
- Advice relating to potential litigation against the estate of the person making the will.

* *A trust is a legal mechanism whereby property can be put in the names of people (trustees) who do not own it, but simply hold it for the benefit of others. The trustees make the necessary ongoing arrangements in relation to the property.*

COMPLETING THE QUESTIONNAIRE

If you opt to complete the questionnaire yourself before contacting a firm, then when you have selected a firm or firms, you can send the completed questionnaire to them by email or post.