



PERSONAL ASSETS RECORD

For the assistance of clients

Morgan McManus Solicitors,
The Diamond,
Clones,
Monaghan,
County Monaghan.

To assist in understanding what is required in:
Making a Will – Republic of Ireland
Making a Will- Northern Ireland
Go to our website at
<http://www.morganmcmanus.com/wills/wills.html>

Tel from ROI: 047 51011
Tel from NI: 00353 47 51011
Email: law@morganmcmanus.ie

Website : www.morganmcmanus.com

NB. Completing this list is NOT making a Will, nor is it instructions for a will

1. WHY COMPLETE THIS LIST?

Because your Executors/Next of Kin/Solicitor could spend many unnecessary hours trying to locate and identify possessions and essential documents after your death and completion of this list could save much time and therefore legal costs.

2. WHERE SHOULD I PUT THE LIST?

Give one copy to your solicitor and, if you wish, keep a copy in another secure place.

3. HOW OFTEN SHOULD I REVIEW SAME?

The list should be updated as your assets or personal circumstances change.

PERSONAL DETAILS

Full name and address

Former addresses

Date of birth

PPS / National Insurance number and type

and location of tax office

Occupation

Residence

Domicile of origin

Particulars of any instructions as to

Funeral/Grave/Arrangements

Date of this list

WILL

Date of Will

Location of Will

EXECUTORS

Names and Addresses

Relationship to Testator if any

ENDURING POWER OF ATTORNEY

Date and Location of EPA

Attorneys

Names and Addresses

Relationship to Donor if any

CIVIL STATUS

Married/Single /Separated/ Widow/er

/Divorced / Civil Partner

Husband's/Wife's name

Date of marriage

Date of Spouse's death, if applicable

If separated or divorced, where is copy of
divorce or separation agreement or order
for any matters affecting rights of
succession or orders affecting pension or
property

Civil partner's name and current address

Date of registration of the civil partnership

Has the civil partnership been dissolved or
annulled

Date of dissolution or annulment of same

If there are any agreements in place re co-habitation, where are they stored?

CHILDREN

Names, ages and addresses

Adopted/Foster/Step-Children/Non-Marital Children

PARTICULARS OF ASSETS (WITH APROX. VALUES) - AND INCLUDE LIABILITIES THEREON

HOUSE AND CONTENTS

Location of Deeds

Is there a Mortgage?

If so, is there a Mortgage Protection Policy?

Shares, attach list if possible - location of share certificates

Bank Accounts – Name and Location of Bank and Account Number

Credit Union - Name and Location of Bank and Account Number

JOINT PROPERTY/JOINT ACCOUNTS

1. Who provided the joint property, and
 2. Who is on death to receive the entire?
 3. The source of the joint property.
 4. Your relationship to the other joint holder/s
 5. How is income being dealt with at present
- Any Other Property?

INSURANCE

Life Assurance

Location of Policy Documents

Any nominated Accounts/policies

ADVISORS

Accountant

Solicitor

Stock Broker

Insurance Broker

OTHER INFORMATION
