

# WILL PLANNER

Thomas W Enright Solicitors  
John's Place  
Birr  
Co Offaly  
R42 EP98  
info@thomaswenright.ie  
057 912 0293

Thomas W. Enright  
SOLICITORS 

## 1. You

**Full Name:**..... **Date of Birth:** ..... / ..... / .....

**Address:** .....

..... **Eircode:**.....

**Telephone Number:** (Home)..... (Mobile) .....

**Marital Status:** Single  Divorced  Engaged  Remarried  Married  Widowed  Separated

## 2. Your spouse or partner

**Full Name:**..... **Date Of Birth:** ..... / ..... / .....

**Address:** .....

..... **Postcode:**.....

**Telephone Number:** (Home)..... (Mobile) .....

**Marital Status:** Single  Divorced  Engaged  Remarried  Married  Widowed  Separated

## 3. Children

| Full Name | Address | Date of Birth | Status* |
|-----------|---------|---------------|---------|
|           |         |               |         |
|           |         |               |         |
|           |         |               |         |
|           |         |               |         |

\* Whether the child is from this relationship, a previous relationship or other circumstances.

# Thomas W. Enright

SOLICITORS



#### 4. Do you have an existing Will?

You: Yes  No

Your Spouse or Partner: Yes  No

#### 5. Nominated guardians for any child yet to reach adulthood. If a trust is required for minor children, details of this will be discussed with you.

| Full name | Address |
|-----------|---------|
|           |         |
|           |         |

#### 6. Do you have any particular funeral wishes? Make sure to inform your next-of-kin now.

#### 7. The value of your estate

This section helps you work out the value of your estate.

##### The approximate value of your major assets

|   |   |
|---|---|
|   | € |
| Your home (or your share in it)                   | € |
| Other property or land                            | € |
| Cars and other vehicles                           | € |
| Home contents including furniture and fittings    | € |
| Items of particular value (e.g. jewellery or art) | € |
| Money in banks and building societies             | € |
| Shares, investments, Premium Bonds                | € |
| Insurance and pensions                            | € |
| Other savings and assets                          | € |

##### Total Assets

##### Your major liabilities

|  |   |
|--|---|
|  | € |
| Your mortgage  | € |
| Loans and overdrafts                                 | € |
| Credit cards   | € |
| Credit or hire purchase agreements Other liabilities | € |
| <b>Total Liabilities</b>                             | € |

Assets less liabilities = estate value

€

## 8. Bequests

**Specific items e.g. cars, ornaments, jewellery.** List the names and addresses of individuals and charities\* to whom you would like to make a specific gift.

| Name | Address | Description |
|------|---------|-------------|
|      |         |             |
|      |         |             |
|      |         |             |
|      |         |             |
|      |         |             |

**Pecuniary bequests (set amounts of money).** List the names and addresses of individuals and charities\* to whom you would like to leave a specific sum of money

| Name | Address | Amount (€) |
|------|---------|------------|
|      |         |            |
|      |         |            |
|      |         |            |
|      |         |            |
|      |         |            |

**Residuary bequests (all of the remainder of your estate).** List the names and addresses of those to whom you would like to leave the rest of your estate, in any particular shares

| Name | Address | Amount (€) or % |
|------|---------|-----------------|
|      |         |                 |
|      |         |                 |
|      |         |                 |
|      |         |                 |
|      |         |                 |

## 9. Choice of Executors

Usually, one or two beneficiaries in the will are and/or a solicitor are appointed. If a solicitor or other professional is appointed, they will your authorisation to charge a fee for the service.

Name of Executors: (1) .....  
(2) .....

Address of Executors: (1) .....  
.....  
(2) .....  
.....

Relationship to you: (1) .....  
(2) .....

# Thomas W. Enright

SOLICITORS



## 10. Legal meanings

**These are some of the words and terms you might encounter when making your Will.**

### **Administrator**

A person appointed by law to finalise your affairs if you die without leaving a will.

### **Beneficiary**

Anyone who receives something from your will.

### **Bequest (or legacy)**

A gift in a will. Gifts are normally pecuniary (a specific sum of money), residuary (generally stated as a share of what is left after all other gifts have been made) or specific (a particular item or property).

### **Codicil**

An addition or amendment to an existing will.

### **Estate**

The net value of everything you own at your time of death.

### **Executor**

A person you appoint to make sure the directions in your will are carried out.

### **Guardian**

A person appointed by a parent to look after their children in the event of their death before the children reach adulthood.

### **Intestacy**

The situation that exists if you die without a valid will.

### **Inheritance Tax**

A tax levied at 33% of the value of your estate over certain thresholds depending on your relationship to beneficiaries.

### **Probate**

The process that proves your will as a valid document.

### **Testator**

The person making the will.

### **Trust**

A provision you can put in your will to treat part of your assets in a particular way after your death.

# Thomas W. Enright

SOLICITORS

