

CONFIDENTIAL

PERSONAL ASSETS RECORD

WHY COMPLETE THIS LIST? Because next-of-kin and solicitors could spend needless hours trying to locate and identify possessions and essential documents after your death. Save legal costs and anxiety.

WHAT SHOULD I DO WITH THE COMPLETED LIST? Give one copy to your solicitor, to put with your Will. If your wish, keep a copy in another secure place, and let the executor(s) appointed in your Will know where it is.

You may also wish complete this list as you prepare to make a Will, and bring it with you when you meet with your Solicitor to make your Will.

NB this is not a Will.

Ensure that you consult a solicitor for advice on making your Will.

1. NAME _____

ADDRESS _____

DATE OF BIRTH _____

DATE THIS LIST WAS MADE _____

DATE REVIEWED _____

As applicable:

SPOUSE/ CIVIL PARTNER'S NAME _____

DATE OF MARRIAGE/ CIVIL PARTNERSHIP _____

DATE OF DEATH OF SPOUSE/ CIVIL PARTNER _____

2. WILL

My Will is with _____

My Will is dated _____

The names and addresses of my executor(s) are _____

3. ADVISORS

SOLICITOR _____

ACCOUNTANT _____

INSURANCE BROKER _____

OTHER _____

4. **BANK ACCOUNTS etc** (provide the name and location of any bank, building society, credit union, post office etc where you have an account)

INSTITUTION _____ a/c number _____

INSTITUTION _____ a/c number _____

INSTITUTION _____ a/c number _____

INSTITUTION _____ a/c number _____

5. REAL PROPERTY

MY HOME _____

MY MORTGAGE IS WITH _____

A/C NUMBER _____

THE DEEDS OF MY HOME ARE WITH _____

OR MY PROPERTY IS REGISTERED UNDER FOLIO NUMBER _____

I OWN THE FOLLOWING PROPERTY (other than my home). Give details as above:

6. INSURANCE

I have the following life and personal accident insurance policies:

COMPANY POLICY No. ON WHOSE LIFE DOCUMENT IS WITH

OTHER INSURANCES:

Policy No.

My household insurance is with _____

My real property is insured with _____

My health insurance _____

My car(s) insured with _____

Other _____

7. TAXES

My VAT/ income tax/ PRSI number (delete as appropriate) _____

My PPS number is _____

8. EMPLOYMENT or BUSINESS

Name _____

Job/ business description _____

Registered company number _____

9. PENSIONS

I am a member of the following pension scheme _____

My pension number is _____

My PPS number is _____

I am in receipt of the following Social Welfare Payments _____

10. INVESTMENTS (Give details of stocks and shares, bonds, savings certs etc)

Investment	Certificate number	Documents are located

11. ANY OTHER RELEVANT INFORMATION
