

Personal Assets Record

1. 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 and it would help to save legal costs and anxiety.

2. What must I do with the completed list?

Give one copy to your solicitor. If you wish, keep a copy in another secure place such as a Bank. Review it as appropriate.

N.B. THIS LIST IS NOT A WILL - ENSURE YOU CONSULT YOUR SOLICITOR FOR ADVICE ON MAKING YOUR WILL.

PERSONAL DETAILS:

Name: _____

Address: _____

Contact Details: _____

Date of Birth: _____

Marital Status: _____

Spouse's name: _____

Date of Marriage: _____

Children: Names: _____ Age: _____

1. _____

2. _____

3. _____

4. _____

5. _____

Spouse's date of death _____

Date list made: _____

Date reviewed. _____

WILL

My Will is with: _____

My Will is dated: _____

My Executor(s) are: Name: _____

Address: _____

Name: _____

Address: _____

ADVISORS.

1. Solicitors: _____

2. Accountant: _____

3. Stock-broker: _____

4. Insurance broker: _____

5. Other: _____

BANK ACCOUNTS: Sole Name/Joint names.

Sole Joint
(With whom)

Bank: _____ A/C NO: _____

Bank: _____ A/C NO: _____

Bank: _____ A/C NO: _____

OTHER ACCOUNTS (Building Society, Post Office, etc.)

ANY NOMINCATIONS ON THE ABOVE ACCOUNTS:

REAL PROPERTY:

Sole **Joint**
(With whom)

Dwelling house: _____

Mortgage provider: _____

A/C NO: _____

The deeds of my house are with:

INSURANCE:

I have in force the following life and personal accident insurance policies:

Company	Policy No:	On whose life	Policy Document is with:
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1. _____

2. _____

3. _____

4. _____

5. _____

Other Insurances:

Policy No.

My household Insurance is with:

My real property is insured with:

My permanent health care insurance is with:

My car(s) insurance is with:

My V.H.I. /Quinn Direct/Vivas No. is:

My other insurances are:

TAXES:

My tax office is: _____

My Income tax/ P.P.S. No. is: _____

EMPLOYMENT:

Company/works name; _____

Job description: _____

Payroll/works No: _____

PENSION:

I am/am not a member of the following pension scheme

My Social Welfare No. is: _____

My Pension No. is: _____

I am in receipt of the following Social Welfare Payments:

INVESTMENTS (Give details of stocks & Shares, Unit Trusts, Bonds, Saving Certs)

OTHER:

**Cashin & Associates,
3 Francis Street,
Ennis,
Co.Clare
Tel:065/6840060**

www.cashinlaw.com

**Mary P.Cashin. B.A., LL.B., Dip. Prop. Tax., A.C.I. Arb.
Sheila Lynch, B.A., LL.B.**