

CONFIDENTIAL
Personal Assets Record

11. EMPLOYMENT

Company/works name: _____

Job Description: _____

Payroll/works No: _____

12. PENSIONS

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

Please ensure to list pensions from previous employments

13. INVESTMENTS (Give details of Stocks & Shares, Unit Trusts, Bonds, Savings Certs etc)

Investment	Certificate of A/C No	Certificate Documents with

14. OTHER INFORMATION

- 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 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 with a bank. Review it as appropriate

NB. THIS LIST IS NOT A WILL – ENSURE YOU CONSULT YOUR SOLICITOR FOR ADVICE ON MAKING YOUR WILL

3. NAME: _____

ADDRESS: _____

DATE OF BIRTH: _____

SPOUSES NAME: _____

DATE OF MARRIAGE: _____

SPOUSES DATE OF BIRTH (if applicable) _____

DATE MADE THE LIST: _____

DATE REVIEWED: _____

DATE REVIEWED: _____

DATE REVIEWED: _____

4. My will is with: _____

My will is dated: _____

My executor(s) are: Name _____

Address _____

My executor(s) are: Name _____

Address _____

5. ADVISERS

- (A) Solicitors: _____
- (B) Accountant: _____
- (C) Stock-broker: _____
- (D) Insurance Broker: _____
- (E) Other: _____

6. BANK ACCOUNTS

Institution/Bank	A/C No	A/C Type	Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

OTHER ACCOUNTS (Building Society, Post Office, etc) (Give Details)

7. REAL PROPERTY

My Home (address) _____

My Mortgage is with: _____

A/C No: _____

The Deeds of my home are with: _____

Estimated value of property	Year
_____	_____
_____	_____
_____	_____
_____	_____

8. I own the following property (other than my home) (give details as above)

	Property	Estimated Value	Year
1.	_____	_____	_____
2.	_____	_____	_____
	Property 1:		Property 2:
Mortgage	_____		_____
Deeds are located:	_____		_____
Mortgage Indemnity/Life cover:	_____		

9. INSURANCE

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

Company	Policy No	On whose life	Policy document is with

OTHER INSURANCES: _____ Policy No. _____

My household insurance is with: _____

My real property is insured with: _____

My permanent health insurance is with: _____

My car(s) insurance is with: _____

My V.H.I No is: _____

My other insurances are: _____

10. TAXES

My tax office is at: _____

My Income Tax/PRSI No is: _____