Personal Asset Record

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Whilst every care has been taken in the preparation of this document, the information provided is for guidance only and is not a substitute for legal advice in any particular situation. The information is correct as of the date of publication.

PERSONAL ASSETS RECORD

Why complete this list?

1.   In order that your next-of-kin and your Solicitor will be able to find your assets reasonably quickly otherwise your next-of-kin and Solicitor may not be able to find them or may find them after considerable cost and anxiety.

2.   What should I do with the completed list? At least keep one copy with your own personal papers and give another copy, if you wish, to your Solicitor, your Executor and any other close professional advisor.

3.   **NAME:**

     Address:

     Husband/Wife's name:

     Date of list: Dates reviewed:

4.   **MY ORIGINAL WILL IS WITH:**

     My Executor(s) are:-

     Name:

     Address:

     Name:

     Address:

5.   **<u>ADVISORS:-</u>**

(a) Solicitors

(b) Accountants

(c) Insurance Broker

(d) Others

6.   **<u>BANK ACCOUNTS:-</u>**

Bank:
Account Number:

Building Society:-
Account Number:

Post Office:-
Account Number:

Other Accounts:-

7.   **<u>PROPERTY:-</u>**

The title deeds of my home are with:

Other property/ies with:

8.   **<u>INSURANCE:-</u>**

I have the following Life and Personal Accident Insurance Policies.

Company:
Policy Number:
On whose life:
Policy Document is with:

9.   **<u>ADDITIONAL ASSETS:-</u>**

I own the following additional assets of value

10.   **<u>TAXES:</u>**

My tax office is at:-
My income tax/PRSI number is:

11.   **<u>OTHER INFORMATION:-</u>**

Issued by W Terence Liston & Co, Solicitors