

CONFIDENTIAL

PERSONAL ASSETS RECORD

Presented by PAUL W TRACEY SOLICITORS

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This Assets record should be completed and kept in a safe place. It can be of great assistance to family members in tracing documents.

N.B THIS IS NOT A WILL – PLEASE CONTACT OUR OFFICES FOR FURTHER ADVICE

1. NAME _____
- ADDRESS _____
- DATE OF BIRTH _____
- PPS/PRSI Number _____
- SPOUSE'S NAME _____
- DATE OF MARRIAGE _____
- DATE OF SEPARATION/DIVORCE (if applicable) _____
- SPOUSE'S DATE OF DATE (if applicable) _____
- DATE OF THIS LIST _____

2. WILL

My Will is with: _____

My Will is dated: _____

My executor(s) are: Name _____

Address _____

Name _____

Address _____

3. ADVISERS

(a) Solicitors: Paul W Tracey Solicitors

(b) Accountant: _____

(c) Insurance broker: _____

(d) Other: _____

4. BANK/FINANCIAL INSTITUTION ACCOUNTS

Bank: _____ A/C No. _____

Bank: _____ A/C No. _____

Bank: _____ A/C No. _____

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

5. PROPERTY

My Home (Address) _____

My Mortgage is with: _____

A/C No. _____

The Deeds of my home are with: _____

6. I own the following property (other than my home).

Other Properties;

Cars

7. 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 contents 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: _____

8. TAXES

My Income Tax/PRSI No. is: _____

9. EMPLOYMENT

Company/works name: _____

Job description: _____

Payroll/works No.: _____

10. PENSIONS

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

My Pension No. is: _____

I am in receipt of the following Social Welfare Payments:

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

INVESTMENT	CERTIFICATE OF A/C No.	CERTIFICATE DOCUMENTS WITH

12. OTHER INFORMATION

Signed: _____

Dated: _____

Wil8601