



## Will Drafting Information Sheet

**Executor:** the person or persons ( a maximum of two can be appointed) who you appoint in your will to carry out the terms of the will.

**Beneficiary:** a person in a will who takes a gift

**CAT:** Capital Acquisitions Tax, also know as gift or inheritance tax. It is the tax that an individual who receives a gift or inheritance must pay. For 2016 the rate of CAT is 33%. Depending on your relationship with the person giving you the gift there is a tax free threshold and below are the thresholds for 2017.

	<b>Group A</b>	<b>Group B</b>	<b>Group C</b>
<b>Relationship to Disponer</b>	Son/Daughter	Parent*/Brother/Sister/ Niece/Nephew/Grandchild	Relationship other than Group A or B
<b>Threshold</b>	€310,000	€32,500	€16,250

\*Where Child predeceases (i.e. dies before) the Parent, then the Parent can qualify for Group A threshold.



## Personal details

Name	
Address	
Occupation	
Date of Birth	
PPS Number	
Instructions in relation to your burial*	

*\*(note this should be communicated to your family as your Will may not be read until after your funeral)*

## Executors and trustees

	Name	Address
Executor		
Trustee One		
Trustee Two		



## Family and Dependants

Spouse/Civil Partner \_\_\_\_\_

Children

Name	Age	Under 18 (Yes/No)

Other Dependants\*:

Name	Address	Relationship to You

\*examples co-habiting partner, aged parents, handicapped relations

Guardians of Infant Children

Name	Address



**EOS**  
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**Assets**

House	
Contents (Insurance Value)	
Bank/Building Society Accounts (List individually)	
An Post Account	
Business	
Pension	
Life Insurance Policy (List if more than one)	
Other Property (ex: stocks and shares)	