

# Personal Affairs Checklist

Seirbhís Chúnaimh  
d'Fhostaithe na Státseirbhíse



Civil Service Employee  
Assistance Service

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**This is a confidential document.  
Keep it in a safe place at all times.**

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# PART 1

## Glossary of Terms

### Civil Status

This means being single, married, separated, divorced, widowed, in a civil partnership within the meaning of the ***Civil Partnership and Certain Rights and Obligations of Cohabitants Act 2010*** or being a former civil partner in a civil partnership that has ended by death or been dissolved.

### Estate

The term used to describe all the deceased person's belongings. This includes property, money and personal belongings; in fact everything that has to be distributed after death.

### Legal Personal Representative

Person who deals with the administration of the estate of a deceased person, i.e. generic term for both executors and administrators.

### Testator

This means a person who makes a Will.

### Executor

Person named by testator to prove his/her Will and administer his/her estate.

### Administrator

Person appointed to administer an estate where the deceased did not leave a Will.

### Codicil

This is a document for adding to, altering, or confirming a Will previously made by the testator.

### Grant of Probate

Legal document obtained from the Probate Office proving the Will and entitling the executor to administer the estate.

### Grant of Administration

Legal document obtained from the Probate Office proving entitlement of the next-of-kin to administer the estate where the person died without making a Will.

### Inheritance

Refers to a transfer of an asset by a person on death under Capital Acquisition Tax law.

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## Introduction

### Purpose of this booklet

This booklet has been produced by the Civil Service Employee Assistance Service (CSEAS) for civil servants. It provides a means of recording concise details of your personal affairs and papers. The information contained herein may be useful to family/next-of-kin in the event of your death.

**PART 2** of this booklet can be **completed by you** as a detailed record of your personal affairs and papers.

It is advisable to keep your completed document in a safe and secure place. If you choose to save this booklet electronically (when completed) please ensure it is saved to a secure area on your computer where it can be easily accessed by family/next-of-kin, if required.

### Civil Service Employee Assistance Service (CSEAS)

The CSEAS is a centralised service within the Department of Public Expenditure and Reform (DPER). Services and supports are provided on a regional basis to civil servants which aim to positively enhance their wellbeing. This Service is an important component of an ethos of promoting employee wellness, resilience and organisational effectiveness.

Upon the death of a serving civil servant the Civil Service Employee Assistance Service is available to provide practical information, advice and support to the family of the deceased civil servant.

Telephone: **0761 000 030**  
email: **cseas@per.gov.ie**  
website: **www.cseas.per.gov.ie**

### Other sources of information and advice

- Citizens Information **www.citizensinformation.ie**
- Civil Service Pensions Information Centre **www.cspensions.gov.ie**
- Dept. of Social Protection **www.welfare.ie**
- Health Service Executive **www.hse.ie**
- Pensions Ombudsman **www.pensionsombudsman.ie**
- Probate information **www.courts.ie**
- Revenue **www.revenue.ie**
- Think ahead **www.thinkahead.ie**

**The following links can only be accessed through civil service work-place computers. The relevant contact phone numbers are included**

- Peoplepoint **www.peoplepoint.gov.ie** Phone: **076 107 1000**
- Payroll Shared Service **www.pssc.gov.ie** Phone: **076 100 2702**

## Making a Will

It is prudent that you engage a qualified solicitor to assist you in drawing up and supervising the execution of your Will.

The two main reasons for making a Will are:

### **(A) You choose who may act as your Executor to administer your assets after your death**

It is prudent that you appoint at least two executors, both of whom should be competent in their roles, younger than you and respected in your family to ensure your estate is administered properly and without dispute as soon as possible after your death.

### **(B) You decide who will inherit your estate**

Making a Will allows you decide how your assets will be administered. It allows you distribute your assets in the most tax efficient manner possible, having regard to the relevant tax thresholds and reliefs of the various beneficiaries in your estate.

Check **[www.revenue.ie](http://www.revenue.ie)** for further information on Capital Acquisitions Tax thresholds applicable to inheritances.

Information on probate is available at **[www.courts.ie](http://www.courts.ie)**

## PART 2

### My Personal Details

Name		Date of Birth	
Home Address			
Civil Status *			
Spouse/Civil Partner/Partner's Name			
Children's Names	Dates of Birth		

\* See page 3 for a glossary of terms

Do you have an adult child with special needs?  
**If yes, please provide details under Children (above)**

### Social Welfare Details

PPSN	
Social Welfare payment or pension (if applicable)	
Social Welfare Claim Number (if applicable)	

## Contact Details of my Legal Personal Representative(s)

Name and Address of my Legal Personal Representative (No.1)	Contact phone number/email address
Name and Address of my Legal Personal Representative (No.2)	Contact phone number/email address

## Details of my Will

I have made a Will - please tick	Yes		No	
My Will is placed with/at				
Date of my Last Will & Testament				
Codicil to my Will & date (if any)				
Contact details of my Solicitor				
- <i>Name and Address</i>				
- <i>Contact number / email address</i>				

## My Employment Details

Employer (former employer if retired)	
Employer's Address	
Employer's Registered Number	
Employer's Phone Number	
Personnel/Payroll Number	
PSSC Pension Number (if retired)	
PPSN (see P.60/Tax Certificate)	
Social Insurance Class (see Note below)	

Directorship(s) held - please tick	Yes		No	
Name & Address of company				
Tax Ref. No.				

### Note:

- Most established civil servants recruited prior to 6th April 1995 pay social insurance at Class B rate
- Most civil servants recruited to established posts on or after 6th April 1995 pay social insurance at Class A rate
- All non-established civil servants pay social insurance at Class A rate
- Social insurance Class D rate applies to permanent and pensionable employees in the public service other than those paying Class B and Class C (Army) recruited prior to 6th April 1995
- Check [www.welfare.ie](http://www.welfare.ie) for Social Welfare benefits under the various social insurance classes



## Group and Scheme Memberships

### Membership - please tick

Civil Service Spouses' & Children's Pension Scheme	Yes		No	
Civil Service Credit Union	Yes		No	
Cana Credit Union (Revenue staff only)	Yes		No	
Hospital Saturday Fund	Yes		No	
Public Service Friendly Society (PSFS)	Yes		No	
An Post National Instalment Savings Scheme (NIS)	Yes		No	
An Post Savings Account	Yes		No	
Private Health Insurance	Yes		No	
- <i>Company Name</i>				
Income Continuance Plan	Yes		No	
- <i>Company Name</i>				
Life Assurance Policy	Yes		No	
- <i>Company Name</i>				
Additional Voluntary Contribution Scheme	Yes		No	
- <i>Company Name</i>				
Trade Union	Yes		No	
- <i>Please specify</i>				
Prize Bonds	Yes		No	
- <i>List the numbers</i>				
Other group scheme	Yes		No	
- <i>Please specify</i>				

## My Personal Documents

Document held	Tick	Details and location of document(s) List the reference number (if applicable)
Birth Certificate		
Marriage Certificate/Civil Partnership Certificate		
Divorce/Separation/Civil Partnership Dissolution docs.		
Passport		
Life Assurance policies		
Insurance policies as follows:		
- House insurance		
- Car insurance		
- Mortgage Protection		
- Others		
Property Deed(s) as follows:		
- Family home		
- Other properties & addresses (e.g. farmland)		
Mortgage paper(s)		
Grave plot papers		
Medical Card (if held)		

## Bank/Building Society/Post Office Account Details

Bank/Building Society*	
Address	
Account details	
- IBAN	
- BIC	
Account details	
- IBAN	
- BIC	
Account details	
- IBAN	
- BIC	

Bank/Building Society*	
Address	
Account details	
- IBAN	
- BIC	
Account details	
- IBAN	
- BIC	
Account details	
- IBAN	
- BIC	

Post Office*	
Post Office Address	
Account(s) details	

\*If any account is a joint account give the other account holder's contact details

## Credit Union Account Details

Credit Union*	
Credit Union Address	
- Account(s) details	

Credit Union*	
Credit Union Address	
- Account(s) details	

\*Include Nominee Name and contact details

## Stocks/Shares/Investment Details

Company Name(s)	
Address(es)	
Stocks / Shares / Investment details	

## Credit Cards

Credit Card Company	
Address	
Credit Card Account(s) details	

## Car Details

Car Make, Model & Reg. No.	
Motor Insurance Co. & Address	
Motor Insurance Policy No.	

## Other Assets

(e.g. Jewellery, Artwork, Collectibles, Boat)

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## Home Utilities

Utility Item	Provider	Account No.
➤ Electricity		
➤ Gas		
➤ Telephone (mobile)		
➤ Telephone (landline)		
➤ TV Network provider		
➤ Wifi/Broadband		
➤ TV Licence		
➤ Refuse Collection		
➤ Water Charges		

## Miscellaneous Additional Information

Date of completion of this document: \_\_\_\_\_

Signed: \_\_\_\_\_



