THE CONSTRUCTION OF WILLS

ALBERT KEATING



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Dedicated to the Memory of my beloved wife Ruth

Me post te vivere mori sit nec ad vitam anima satis sit dimidia

PREFACE

In a construction suit involving a will, the first duty of the court is to ascertain and give effect to the intention of the testator. The raw material, so to speak, for this purpose is the will itself. At this stage the will will have passed the test of probate and it will be conclusive evidence of the testator's wishes. The language used by the testator will thereafter be viewed as providing the evidence of the testator's intention. Obviously, if a construction is required there is some doubt regarding the clarity of expression of intention. On a construction, bearing in mind that the testator's intention is the primary concern, the court will first read the will and give an ordinary meaning to the words used by the testator unless the context of the will suggests a different meaning. Where a testator uses the technical language of lawyers, the court will first presume that the testator intended a technical meaning to be given to the words, especially if the will was drafted professionally, unless there is a clear indication to the contrary in the will. The testator will be viewed as not only the author of the will but may also be its lexicographer. If the testator uses ordinary words but does not attach an ordinary meaning to them, he is free to do so for the purposes of his will, but in order to have them interpreted in this way he must provide the dictionary; the same applies in the case of technical words used by him. This will be the approach of the court to the language of the will.

Where a reading of the will does not divulge the testator's intention, the court may then fall back on rules of construction which will become applicable unless a contrary intention appears from the will. For instance, even the basic rule of construction that every will shall be construed to speak and take effect as if it had been executed before the death of the testator is subject to a contrary intention appearing from the will. In other words, a rule of construction may be applied to effectuate the testator's intention unless he intends otherwise. Where, however, the attempt to effectuate the testator's intention is in conflict with a rule of law, the rule of law prevails. For instance, where a gift is the subject of construction and its terms infringe the rule against perpetuities, the gift will be invalid no matter what the intention of the testator, although the court will be slow to apply the rule in the case of wills. Furthermore, where an equitable doctrine or concept becomes applicable, it will first be applied in furtherance of the testator's intention if at all possible but may be applied in the interests of justice and fairness regardless of the testator's intention.

Where a will exists, there is a presumption against an intestacy and the court will do all in its power to construe a gift so as to save it from an intestacy. It may be said here that section 99 of the Succession act 1965 also allows for such an approach to be taken by the court. However, there is a limit to what the court can do and where a gift cannot be saved without rewriting a testamentary provision the gift will fail

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as the court is not empowered to rewrite a will even in a case where it is clear to the court what the testator intended to do. This is where duty and power come into collision. In an appropriate case, however, and within the circumstances allowed by section 90 of the Succession Act 1965, the court may admit extrinsic evidence, and while, of course, section 90 does not empower the court to rewrite a will it does allow the admission of extrinsic evidence where it assists the court in deciphering the testator's intentions or to explain a contradiction appearing on the face of the will.

Other matters may also impinge on a will. It may happen that after the death of the testator it is alleged that he created a *donatio mortis causa* during his lifetime to take effect on his death and a gift in his will disposes of the same subject matter. Or that the legal right of a surviving spouse has to be taken into account, or that the testator's children have decided to make an application under section 117 of the Succession Act 1965. In the case of a *donatio mortis causa* there must be sufficient evidence to show that the conditions for creating such a gift have been satisfied and where it is so the subject matter of the *donatio* will not form part of the estate to be distributed by the will. In the case of the spouse's legal right and an application by the testator's children under section 117 while the will will stand the testator's estate may be affected by the value of the legal right and by the court order under section 117 and a distribution in furtherance of the will accordingly.

Where a will containing a foreign element is involved the rules of private international law may also become applicable and due cognisance will be given to such rules by the court in the construction of the will.

It is the intention of the author to approach the subject matter of the book bearing in mind the foregoing perspectives and out of which he has constructed his format. To facilitate, this approach the book is divided into three parts. The first part deals with procedural rules applied by the court to the construction of a will. The second part considers the application of the substantive rules of construction and equitable doctrines and concepts which may be relied on by the court during the course of a construction, and also deals with the creation of non-testamentary gifts which may obtrude on a will. The third part deals with the interpretation of statutory rights and claims arising out of the making of a will and because they are payable out of the estate available for distribution they may also affect the dispositions made by the will.

As the construction jurisdiction of the court regarding wills is confined to the internal evidence of the will, subject to the limited occasions allowed by section 90 of the Succession Act 1965, for the admission of extrinsic evidence the author has thought it illustrative and instructive in certain cases to recite the relevant portion of the will which the court was called upon to construe in order to appreciate more fully the exercise of the court's jurisdiction in this instance. While it is accepted that a will is peculiar to its author and has no "twin brother," and that a construction of a will in one case may be of little or no assistance in other cases, where a rule of construction is required to be applied, or indeed, a rule of law, a case requiring this may have a more general application and may be relevant to other cases where that particular rule is required to be used.

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The author wishes to express his gratitude to various wonderful people who provided encouragement and assistance during the writing of this book. He wishes particularly to express his love and gratitude to his children, Grattan, Sarah, Eddie and Giorgio without whose encouragement and strength the author might not have continued especially in the aftermath of their beloved mother's death. He also wishes to acknowledge with gratitude the friendly, efficient and professional assistance of Catherine Dolan, Commercial Manager, and Dave Ellis, Editorial Manager of Round Hall Sweet & Maxwell. He would also like to express a special thanks to his colleagues, Gráinne Callanan, Dr. Shane Kilcommins, Jason O'Riordan and Walter O'Leary.

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FOREWORD

In this latest contribution to a series of books which have rapidly become the touchstone for both practitioners and students of probate law in Ireland, Mr. Keating turns the spotlight on that most nebulous of subjects, the principles and practice of testamentary construction. The sure-footed manner in which the author guides us through the complexities of his subject is a testament to both his intuition and his endeavour. Mr. Keating masterfully avoids the hazards of ambiguity, the lifeblood of his subject matter. In so doing, the book succinctly addresses the fallout from the collision that often occurs between the court's duty to give effect to the intention of the testator and the limitations on its powers in this regard.

The first part of the book focuses on the procedural rules of construction, with a particularly cogent summary of the law in relation to the permissible use of extrinsic evidence in the ascertainment of the testator's intention. This part also contains a weighty section on the construction of foreign wills and the law governing foreign succession rights, statutory rights and intestacies. In this, the author expands upon an area previously addressed in his earlier works, most notably *Probate Causes and Related Matters*, where he analyses how the rules of private international law impact on the constructive of certain wills.

The substantive rules of construction, dealt with in the second part of the book, include such matters as the construction of absolute and conditional gifts, class rights and powers of appointment. While much of the source material is familiar, the author teases out the most salient elements of the law in both a user-friendly and thorough format. The circumstances in which equitable doctrines and nontestamentary gifts affect the construction of wills are also clearly sign posted in this part of the book.

The third and final part of the work deals with the interpretation of statutory rights and claims: the legal and related rights of a spouse and the moral duty of the testator to make adequate provision for his children. The increased complexity of family life and relationships in the present day has led to a complex statutory framework, which Mr. Keating once again presents in a coherent and structured manner. His ability to introduce common law concepts and principles at the appropriate time serves to answer the most pressing issues on which the statute law is silent or ambiguous.

The Construction of Wills constitutes a valuable contribution to our understanding of how the law of probate endeavours to extract the intention of the testator from an abstract document, while simultaneously doing justice to all parties with a legitimate interest therein. It is a work crafted at the coal face of probate law, but retains an admirable objectivity throughout. Space has been allocated with a view

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to reflecting the proportionate importance of the issue raised. As with all good books, what the author says is important, what he does not say is also important for the fact that he does not say it. It is with great pleasure that I accepted the invitation to pen this foreword, as it affords me the best seat in the house to wholeheartedly recommend this book.

FREDERICK MORRIS, President, The High Court

October 2001

ABBREVIATIONS

Ad. & E. Adolphus & Ellis's Reports (1834–1841) Add. Addams' Ecclesiastical Reports (1822–1826)

All E.R. All England Law Reports

A.C./App. Cas. Appeal Cases (A.C.-1891 to date)

Atk. Atkyns (1736–1755)

B. & A. Barnewell & Adolphus' King's Bench Reports (1830–1834)

B. & Ald. Barnewall & Alderson (1817–1822)

B. & S. Best & Smith (1861–1870)

Beav. Beavan's Rolls Court Reports (1838–1866)
Bing. Bingham's Common Pleas Reports (1822–1840)

Bro. Ch. C. Brown's Chancery Cases (1778–1794)

Carth. Carthew's King's Bench Reports (1668–1701)
C.B.N.S. Common Bench Reports (New Series) (1856–1865)

Ch./Ch. D. Chancery (1891 to date) (1875–1890) Ch. App. Chancery Appeals (1865–1875)

Cl. & F. Clark & Finnelly's House of Lords Cases (1831–1846)

C.L.Y.B. Current Law Year Book

Co./Co. Rep. Coke's King's Bench Reports (Eliz. I-James I)

Cox Eq. Cox's Equity Cases (1745–1797)

Cowp. Cowper's King's Bench Reports (1774–1778)

Cr.M. & R. Crompton, Meeson & Roscoe's Exchequer Reports (1834–1835)

Cr. & M. Crompton & Meeson's Exchequer Reports (1832–1834)
Cr. & Ph. Craig & Phillips' Chancery Reports (1840–1841)

Curt. Curteis' Ecclesiastical Reports (1834–1844)

D. & War.
Dea. & Sw.
Deane & Swabey's Ecclesiastical Reports (1841–1843)
De G. & J.
De Gea & Jones' Chancery Reports (1856–1859)

De G. & Sm.

De Gex & Smale's Vice-Chancellor's Reports (1846–1852)

De G.F. & J.

De Gex, Fisher & Jones' Chancery Reports (1831–1846)

De G.J. & S.

De Gex, Jones & Smith's Chancery Reports (1831–1846)

De G.M. & G. De Gex, Macnaghten & Gordon's Chancery Reports (1851–1857)

Dick. Dicken's Chancery Reports (1559–1792)

Dr. & Sm. Drewry & Smale's Vice Chancellor's Reports (1859–1865)
Dr. & War. Drury & Warren's Irish Chancery Reports (1841–1843)
Drew. Drewry's Vice Chancellor's Reports (1852–1859)

E. & B. Ellis & Blackburn's Queen's Bench Reports (1852–1858)

E. & E. Ellis & Ellis' Queen's Bench Reports (1858–1861)

Eq. Equity Cases (1866–1875)

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Esp. N.P. Espinasse's Nisi Prius Reports (1793–1810)

Fam. Family Division (1972 to date)

Fam. L.J. Family Law Journal

H. & C. Hurlstone & Coltman (1862–1866)

Hag. Ecc. Haggard's Ecclesiastical Reports (1827–1833)

Hare Hare's Chancery Reports (1841–1853) H.L.C./H.L. Cas. House of Lords Cases (1847–1866)

Hurl. & C. Hurlstone & Coltman's Exchequer Reports (1862–1866)

I.C.L.M.D. Irish Current Law Monthly Digest

I.L.T. Irish Law Times

Ir. Eq. Irish Equity Reports (1838–1850)
Ir. Jur. Rep. Irish Jurist Reports (1935 to date)
Ir. R. C.L. Irish Reports, Common Law
I.L.R.M. Irish Law Reports Monthly
I.L.T.R. Irish Law Times Reports

I.R. Irish Reports (1833–1893) (1893 with date to date)

John, & H. Johnson & Hemming's Vice-Chancellor's Reports (1859–1862)

Jur. Jurist (1837–1854)

K. & J. Kay & Johnson's Vice Chancellor's Reports (1854–1958)

K.B. King's Bench Division (1901–1952)
Keen Keen's Rolls Court Reports (1836–1838)
Lee Lee's Ecclesiastical Judgements (1752–1758)
L.J.C.P. Law Journal Reports, New Series, Common Pleas
L.J. Ch. Law Journal Reports, Chancery (1831–1946)

L.J.Ir. Law Journal, Irish

L.J.P.D. & A. Law Journal Reports, New Series, Probate,

Divorce, Admiralty (1876–1946)

L.J.P.M. & A. Law Journal Reports, Probate, Matrimonial &

Admiralty (1860-1865)

L.J.P. & M. Law Journal Reports, New Series, Probate &

Matrimonial (1858–1875)

L.R. H.L. Law Reports, House of Lords (1866–1875)

L.R. Ir. Law Reports, Ireland (1878–1893)

L.R.P. & D. Law Reports, Probate & Divorce Cases (1865–1875)

L.T./L.T.R. Law Times Reports (1859–1947)
Lutw. Lutwyche's Common Pleas Reports
M. & Gr. Manning & Granger (1840–1844)
M. & K. Mylne & Keen (1832–1835)

M. & W. Meeson & Welsby's Exchequer Reports (1836–1847)
Mac. & G. Macnaghten & Gordon's Chancery Reports (1849–1852)

Maddock's Reports (1815–1822)

McCl. & Y. McCleland & Younge's Exchequer Reports (1824–1825)

Mer. Merivale's Chancery Reports (1815–1817)
Milw. Milward's Irish Ecclesiastical Reports

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Mod. Rep. Modern Reports (1669–1732)

Moo. P.C./Moore P.C. Moore's Privy Council Cases (1836-1862)

My. & Cr. Mylne & Craig's Chancery Reports (1835–1841)

N.C. Notes of Cases (1841–1850)

N.I. Northern Ireland Law Reports (1925 to date)

N.I.Y.B. Northern Ireland Year Book

N.Z.L.R. New Zealand Law Reports (1883 to date)

O.R. Ontario Reports (1823 to date)

P. Law Reports, Probate (1890 to date)

P. & D. Law Reports, Probate & Divorce (1865–1875)

P. & M. Probate & Matrimonial (1858–1875)

P.D. Law Reports, Probate, Divorce and Admiralty Division

(1875 - 1890)

P. Wms. Peere Williams' Chancery Reports (1695–1735)

Ph. Phillips' Chancery Reports

Phill. Ecc. Judg. Phillimore's Ecclesiastical Judgments (1809–1821)
Phill. Ecc. R. Phillimore's Ecclesiastical Reports (1809–1821)

Prec. Ch. Precedents in Chancery (1689–1722)

Q.B./Q.B.D. Queen's Bench Division (1841 to date) (1875–1890) Rob./Rob. Eccl. Robertson's Ecclesiastical Reports (1844–1853)

Rus. Russell's Chancery Reports (1823–1829)

Russ. & M. Russell & Mylne's Chancery Reports (1829–1833)
Salk. Salkeld's King's Bench Reports (1689–1712)

Sch. & Lef. Schoales & Lefroy (1802–1807)

Sim. Simons' Vice Chancellor's Reports (1826–1852)

S.J. Solicitors' Journal (1857 to date)

Sw. & Tr. Swabey & Tristram's Ecclesiastical Reports (1858–1865)

Taunt. Taunton's Common Pleas Reports (1807–1819)
T.L.R. Times Law Reports (1884–1950) (1951 to date)
Turn. & R. Turner & Russell's Chancery Reports (1822–1825)

Vern. Vernon's Chancery Reports (1681–1719)
Ves. Jun. Vesey Junior's Chancery Reports (1754–1817)
Ves. Sen. Vesey Senior's Chancery Reports (1746–1755)
Wightw. Wightwick's Exchequer Reports (1810–1811)

W.L.R. Weekly Law Reports (1953 to date)

W.N. Weekly Notes (1866–1952)

Y. & C. Younge & Collyer's Exchequer Reports (1834–1842)

You. Younge's Exchequer Reports (1830–1832)

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January 18, 2001
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