

Asset Schedule for Inheritance Tax Planning

Please enter estimates of the current value of your assets, gifts and liabilities to give an idea of the make-up of your estate. Where assets/liabilities are joint please enter shares::

Assets	Self	Spouse/ Partner
Private residence (tenants in common / joint tenancy)* (freehold/leasehold)*	_____	_____
Other houses, flats etc and land	_____	_____
Investments: - Bank and Building Society accounts	_____	_____
- TESSAs	_____	_____
- National Savings	_____	_____
- PEPs / ISAs	_____	_____
- Unit Trusts (non PEP)	_____	_____
- Stocks and Shares	_____	_____
- Investment Bonds	_____	_____
- Endowment policies (non mortgage)	_____	_____
- Other	_____	_____
Business assets: - Shares in private companies	_____	_____
- Share in partnership interests	_____	_____
Chattels, jewellery, works of art, cars, boats etc.	_____	_____
Life insurance: - Endowment policies (re mortgage)	_____	_____
- Whole of Life policies	_____	_____
- Term policies	_____	_____
- Death-in-Service	_____	_____
Interest in property held under Trust	_____	_____
Total Assets:	=====	=====
<u>Gifts</u>	_____	_____
Gifts (of over £3000 in any one year) made in the last 7 yrs	=====	=====
<u>Liabilities</u>		
Mortgage	_____	_____
Other loans	_____	_____
Overdraft	_____	_____
Other liabilities	_____	_____
Total Liabilities:	=====	=====

* delete as applicable

Contact a member of our Probate Team at any time for expert advice on 01223 417200

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