

Name:-----

You may find it useful to complete this Inheritance Tax Checklist. Please see attached personal balance sheet for completion. By listing all of your assets and liabilities you will get an indication of the potential value of your estate. It is a useful starting point in assessing whether you have a potential Inheritance Tax Liability.

If it looks as if you have a liability then there are a number of steps you can take to mitigate the amount payable. With Inheritance Tax planning it is essential to start as early as possible. This will give you the best opportunity to take full advantage of the alternative options available to minimise the eventual Inheritance Tax bill.

1. If you are a foreign domiciliary, how long have you been resident or living in the UK?
2. Domiciliary of spouse?
3. Please provide details of gifts over £3,000 made in the last 7 years:

Date	Recipient	Amount

4. Have you made a will? If so please provide a copy, or failing this, brief details of the material contents

5. Please list the name of children, grandchildren, relatives and friends to whom you may consider making gifts in order to reduce IHT. In the case of children under 18, please provide dates of birth.

Name	Date of Birth	Relationship	Amount

6. Please complete the Personal Balance Sheet (enclosed with this form) and then return to us
7. Please provide details of any life cover policies in respect of your own life written into trust
8. Consider whether it would be appropriate for you to execute a lasting power of attorney for use in the event that you are incapacitated.
9. Does your estate plan make adequate provision for any long term care that your (or your spouse or civil partner) may need?

Are you interested in Business Potential taster?

Do you have a relevant life policy?