

 **Schedule 1 - Assets**

|  |  |
| --- | --- |
| ITEM | Value £ |
| House /property |  |
| Bank Accounts |  |
| Building Society Accounts |  |
| Investments |  |
| Life Insurance |  |
| Pensions |  |
| Household Possessions / Cars |  |
| Other Assets |  |
| TOTAL ASSETS | £ |

Liabilities

|  |  |
| --- | --- |
| ITEM | Value £ |
| Outstanding Mortgage |  |
| Bank loans |  |
| Overdraft |  |
| Credit Cards |  |
| Other Money Owed |  |
| TOTAL LIABILITIES | £ |

|  |  |
| --- | --- |
| Net Estate = Total Assets – Total Liabilities =  | £ |

**Note**

Inheritance tax information 2014/15 Tax Rate

Net Estate up to £325,000 Nil

Over £325,000 40%

[reduced to 36% if 10% or more of estate is left to charity]



**Schedule 2 - Beneficiaries**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| NAME | ADDRESS | %SHARE | AMOUNT | SPECIFICITEM |
|  |  |  |  |  |
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