

INHERITANCE TAX ASSET CHECKLIST

ASSET DETAIL (eg. Bank Account, Bonds etc)	IN WHOSE NAME (Insert name(s))	APPROXIMATE PRESENT VALUE
YOUR HOME:		
BANK ACCOUNTS:		
BUILDING SOCIETIES:		
INSURANCE SAVINGS PRODUCTS:		
LIFE ASURANCE POLICIES:		
NATIONAL SAVINGS:		
STOCK & SHARES:		
PROPERTIES IN U.K. :		
PROPERTIES OVERSEAS:		

**IN ADDITION WE WILL NEED TO HAVE DETAILS OF ANY
BUSINESS INTERESTS OR PRIVATE COMPANY
SHAREHOLDINGS YOU MAY HAVE AND WHETHER OR NOT
YOU ARE INVOLVED IN AGRICULTURE**