

**Inheritance Tax
Planning Schedule**
June 2023

Inheritance Tax Planning Schedule

Client Name:

Date of Completion:

Client Reference:

Personal Information

	Self	Spouse/Civil Partner
Full Name:		
Address:		
Marital Status:		
Date of Birth:		
Place of Birth:		
If applicable, number of years lived in the UK		

Descendants

Children

Name(s):		
Date(s) of Birth:		

Grandchildren

Name(s):		
Date(s) of Birth:		

Personal/Family Assets

	Total (£)	Self (£)	Spouse/Civil Partner (£)
Business Assets and Interests			
Land and Property			
Main Residence			
Other Land and Property (UK and Overseas)			
Other Investments			
ISA's, Cash at Bank, Building Society, National Savings			
Quoted Investments			
Unquoted Investments			
Sundry Investments			
Personal Assets			
Household Contents and Chattels			
Jewellery, Artwork and Antiques			
Other Valuables (i.e. cars, boats, etc.)			
Gross Personal Estate			

Personal/Family Assets Cont.

	Total (£)	Self (£)	Spouse/Civil Partner (£)
Pension Funds			
Life Insurance Policies			
Gross Insured Assets/ Funds			
Liabilities			
Mortgage			
Property Loans - Others			
Sundry Investments			
Total Debts			
Net Estate			

Other Information

Other Financial Interests

Self (£)

Spouse/Civil Partner (£)

Trust Interests		
Possible Future Inheritances		

Lifetime Gifts - If applicable

Date	Description	Amount

Additional Information - If applicable

Previous marriage(s) - Details of former Spouse/Civil Partner	
Date of his/her death (if applicable)	
Other information - Have you made a Will? May we have a copy?	
Have you made a Lasting Power of Attorney for Health and Welfare?	
Have you made a Lasting Power of Attorney for Property and financial affairs?	

Inheritance Tax Planning Schedule

I / we confirm the information held in this document to be an accurate reflection of my / our personal and financial circumstances, and I / we understand it will form the basis of any advice provided to me / us by Monahans.

Name:

Signed:

Date:

Spouse / Civil Partner:

Signed:

Date:



Bath

Lennox House
3 Pierrepont Street
Bath BA1 1LB
01225 472800

Chippenham

14a Forest Gate
Pewsham
Chippenham
Wiltshire SN15 3RS
01249 766966

Frome

Unit 11
The Business Courtyard
Standerwick, Frome
Somerset BA11 2QB
01373 830955

Glastonbury

3 Landmark House
Wirral Park Road
Glastonbury
Somerset BA6 9FR
01458 836810

Swindon

Hermes House
Fire Fly Avenue
Swindon
Wiltshire SN2 2GA
01793 818300

Taunton

Suite B, Blackdown House
Blackbrook Park Avenue
Taunton
Somerset TA1 2PX
01823 462400

Trowbridge

County Gate
County Way
Trowbridge
Wiltshire BA14 7FJ
01225 785520