

Fact Find

Application Type

joint

Relationship

wife

Client 1

Client\_name\_1

Client 2

fname

Client Details

<div>Gender</div> <div>Male</div>	<div>DOB</div> <div>16/11/2022</div>	<div>Gender</div> <div>Male</div>	<div>DOB</div> <div>16/11/2022</div>
<div>Nationality</div> <div>British</div>	<div>Residence</div> <div>UK</div>	<div>Nationality</div> <div>British</div>	<div>Residence</div> <div>UK</div>
<div>Home Telephone</div> <div>p1_2382348234</div>	<div>Mobile Number</div> <div>p1_98827983</div>	<div>Home Telephone</div> <div>p1_2382348234</div>	<div>Mobile Number</div> <div>p1_98827983</div>
<div>Email</div> <div>updateparty111@gmail.com</div>	<div>Owned</div> <div>Yes</div>	<div>Email</div> <div>updateparty111@gmail.com</div>	<div>Owned</div> <div>Yes</div>
<div>Address</div> <div>Some random address</div>	<div>Residence Type</div> <div>Main</div>	<div>Address</div> <div>Some random address</div>	<div>Residence Type</div> <div>Main</div>
<div>Employment Status</div> <div>Employed</div>	<div>Health Status</div> <div>Good</div>	<div>Employment Status</div> <div>Employed</div>	<div>Health Status</div> <div>Good</div>
<div>Employment Notes</div>	<div>Health Notes</div> <div>test notes</div>	<div>Employment Notes</div>	<div>Health Notes</div> <div>test notes</div>
<div>Are you able to read &amp; sign unaided ?</div> <div>Yes</div>		<div>Are you able to read &amp; sign unaided ?</div> <div>Yes</div>	
<div>Are you abput to marry or enter any civil partnership ?</div> <div>Yes</div>	<div>Date</div> <div>16/11/2022</div>	<div>Are you abput to marry or enter any civil partnership ?</div> <div>Yes</div>	<div>Date</div> <div>16/11/2022</div>

Dependants

Full Name	Gender	DOB
Client Name	Male	16/11/2022
Capacity Issues	Appoint Guardians	Appoint as beneficiary
true	false	true

Full Name	Gender	DOB
Client Name	Male	16/11/2022
Capacity Issues	Appoint Guardians	Appoint as beneficiary
true	false	true

Full Name	Gender	DOB
Client Name	Female	16/11/2022
Capacity Issues	Appoint Guardians	Appoint as beneficiary
true	false	true

Full Name	Gender	DOB
Client Name	Female	16/11/2022
Capacity Issues	Appoint Guardians	Appoint as beneficiary
true	false	true

Gifts Have you gifted any asset or monetary gifts in the last 7 years ? : **No**

Gift To	
John Cena	
DOB	Value
16/11/2022	£ 245

Gift To	
roopa	
DOB	Value
16/11/2022	£ 245

Properties

Main Residence	
Address	
xyz of partyl	
Town	County
Downtown	Some County
Pincode	Country

Main Residence	
Address	
xyz of partyl	
Town	County
Downtown	Some County
Pincode	Country

456543	UK
Tenant type	Registered
Yes	Yes
Value	Mortgage
£	£ 987
Term	Net value
10	£ 43,598,475,948
Note	
some note abt properties	

456543	UK
Tenant type	Registered
Yes	Yes
Value	Mortgage
£ 72873	£ 987
Term	Net value
10	£ 43,598,475,948
Note	
some note abt properties	

Savings

Bank & Building Societies	
Account/Name	Balance
account_test_2	£ 6,343

ISAs	
Account/Name	Balance
account_test_2	£ 7,643,874

Bank & Building Societies	
Account/Name	Balance
account_test_2	£ 6,343

ISAs	
Account/Name	Balance
account_test_2	£ 7,643,874

Shares & Investments

Private Company Shares	
Inheritance Tax Treatment	
Inside Estate	
Description	Value
sdfjsdfjsdj	£ 3,475,783,463

Other	
Inheritance Tax Treatment	

Private Company Shares	
Inheritance Tax Treatment	
Inside Estate	
Description	Value
sdfjsdfjsdj	£ 3,475,783,463

Other	
Inheritance Tax Treatment	

Outside Estate	
Description	Value
sdfjsdfjsdj	£ 3,475,783,463

Outside Estate	
Description	Value
sdfjsdfjsdj	£ 3,475,783,463

Life Insurance

Policies with a name beneficiary or written into trust will NOT form part of a client's estate for IHT purposes

Insurance Type	Value
Term	£ 753,487
Provider	asjhdsjhfsj
Up to date Death Benefit Nomination Form	
Yes	

Insurance Type	Value
Term	£ 753,487
Provider	asjhdsjhfsj
Up to date Death Benefit Nomination Form	
Yes	

Insurance Type	Value
Other	£ 43,546
Provider	gfhfhgh
Up to date Death Benefit Nomination Form	
Yes	

Insurance Type	Value
Other	£ 43,546
Provider	gfhfhgh
Up to date Death Benefit Nomination Form	
Yes	

Pension

These can generally can be considered to NOT included in a Client's estate

Pension Type	Status
Other	Active
Provider	Value
ajsfnsfjsfg dnf	£ 7,434
Up to date Death Benefit Nomination Form	
Yes	

Pension Type	Status
Other	Active
Provider	Value
ajsfnsfjsfg dnf	£ 7,434
Up to date Death Benefit Nomination Form	
Yes	

Assets

Vehicles	Vehicles								
<table><tr><td>Description</td><td>Value</td></tr><tr><td>nsdmsd</td><td>£ 28,322</td></tr></table>	Description	Value	nsdmsd	£ 28,322	<table><tr><td>Description</td><td>Value</td></tr><tr><td>nsdmsd</td><td>£ 28,322</td></tr></table>	Description	Value	nsdmsd	£ 28,322
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nsdmsd	£ 28,322								

Business Assets

Shares can attract upto 100% of relief / Property at up to 50% relief

<div>Company Name</div> <div>xyz</div> <table><tr><td>Type</td><td>Percentage Share</td></tr><tr><td>Limited&gt;</td><td>49743</td></tr><tr><td>Trading Business</td><td>Share Value</td></tr><tr><td>Yes</td><td>£</td></tr></table> <div><div>Property</div><div><div>Business Property</div><div>businessProperty</div></div><table><tr><td>Net Value</td><td>Mortgage</td></tr><tr><td>£ 89787</td><td>£ 9809</td></tr></table></div>	Type	Percentage Share	Limited>	49743	Trading Business	Share Value	Yes	£	Net Value	Mortgage	£ 89787	£ 9809	<div>Company Name</div> <div>xyz</div> <table><tr><td>Type</td><td>Percentage Share</td></tr><tr><td>Limited&gt;</td><td>49743</td></tr><tr><td>Trading Business</td><td>Share Value</td></tr><tr><td>Yes</td><td>£</td></tr></table> <div><div>Property</div><div><div>Business Property</div><div>businessProperty</div></div><table><tr><td>Net Value</td><td>Mortgage</td></tr><tr><td>£ 89787</td><td>£ 9809</td></tr></table></div>	Type	Percentage Share	Limited>	49743	Trading Business	Share Value	Yes	£	Net Value	Mortgage	£ 89787	£ 9809
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Liabilities

<div>Secured Loans</div> <table><tr><td>Lender</td><td>Outstanding Balance</td></tr><tr><td>lender test</td><td>£ 874578</td></tr></table>	Lender	Outstanding Balance	lender test	£ 874578	<div>Secured Loans</div> <table><tr><td>Lender</td><td>Outstanding Balance</td></tr><tr><td>lender test</td><td>£ 874578</td></tr></table>	Lender	Outstanding Balance	lender test	£ 874578
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## Beneficiaries

If you were to die first, are all assests  
soley in your name to be left to the other  
client in the first instance?

Yes

If you were to die first, are all assests  
soley in your name to be left to the other  
client in the first instance?

Yes - 0

Name	Relationship
John Doe	Spouse
Gender	DOB
Male	16/11/2022
Vulnerable	Note
Yes	Some random note

If you were to die first, are all assests  
soley in your name to be left to the other  
client in the first instance?

Yes

Name	Relationship
John Doe	Spouse
Gender	DOB
Male	16/11/2022
Vulnerable	Note
Yes	Some random note

## Exclusions

Name	Gender
tyuds	Male
DOB	Relationship
16/11/2022	wife
Reason of exclusion	
some random reason for exclusion which cannot be exclaimed	

Name	Gender
tyuds	Male
DOB	Relationship
16/11/2022	son
Reason of exclusion	
true	