

Deceased's assets at the date of death

Make the fullest enquiries so that you can show that the figures on this form are correct. If you cannot find the value for an item, you may include your best estimate.

Assets added to the estate for Inheritance Tax for which a grant of representation is not required

- 9.1** Gifts and other lifetime transfers (after deduction of allowable exemptions) made in the 7 years before they died. This does not include legacies in the will.

Show the date and description of gifts, who they were made to and any exemptions you have deducted in the box below

Box 9.1 £

- 9.2** Deceased's share of joint assets passing automatically to the surviving joint owner even if they are the husband, wife or civil partner.

For example, a house owned as joint tenants, joint bank accounts or household goods. Describe the asset and give its whole value in the box below and say what share the deceased owned. If it is a house, give the address. Put the value of the deceased's share in box 9.2

Box 9.2 £

- 9.3** Assets held in trust for the benefit of the deceased during their lifetime.

Please tell us what assets were in the trust, the name of the person who set up the trust and the date it was set up

Box 9.3 £

- 9.4** Nominated assets

Box 9.4 £

- 9.5** Assets outside of the UK

Box 9.5 £

Gross value of assets for which a grant is not required
(add together the figures in boxes 9.1 to 9.5)

Box A £