

# Estate form

Customer reference number

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**Estate Accounts of the late**

## Estate assets

Please enter the details of **all** assets held in the **sole name** of the deceased (if assets are not held, please select not applicable where appropriate):

**Property value**

(please enter the value in first field, or tick N/A if not applicable)

£  N/A **Property Ownership confirmation**

Please select appropriate option

Sole ownership of deceased Tenants in Common Joint ownership **Bank account**

(please enter the value in first field, or tick N/A if not applicable)

£  N/A **Savings account**

(please enter the value in first field, or tick N/A if not applicable)

£  N/A **Building Society account**

(please enter the value in first field, or tick N/A if not applicable)

£  N/A **ISA account**

(please enter the value in first field, or tick N/A if not applicable)

£  N/A **Insurance policy paid out to estate**

(please enter the value in first field, or tick N/A if not applicable)

£  N/A **Pension paid out to estate**

(please enter the value in first field, or tick N/A if not applicable)

£  N/A **Shares/Unit Trusts**

(please enter the value in first field, or tick N/A if not applicable)

£  N/A **National Savings account**

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

**Premium Bonds**

(please enter the value in first field,  
or tick N/A if not applicable)

£  N/A

**Motor vehicle**

(please enter the value in first field,  
or tick N/A if not applicable)

£  N/A

**Sole Trader Commercial vehicle(s)**

(please enter the value in first field,  
or tick N/A if not applicable)

£  N/A

**Sole trader Commercial property**

(please enter the value in first field,  
or tick N/A if not applicable)

£  N/A

**Sole Trader Commercial stock value**

(please enter the value in first field,  
or tick N/A if not applicable)

£  N/A

**Other (please specify)**

Please tick if other is not applicable

Name of asset  Value of asset £  N/A

Name of asset  Value of asset £  N/A

**Total value of assets**

£

# Estate liabilities

Please enter the details of **all** liabilities held in the **sole name** of the deceased (if liabilities are not held, please select not applicable where appropriate):

## Funeral expenses

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Income tax

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Inheritance tax

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Capital Gains tax

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## National Insurance

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Solicitor's Fee

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Mortgage

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Credit Card no. 1

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Credit Card no. 2

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Credit Card no. 3

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Store Card

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Bank Loan no. 1

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Bank Loan no. 2

(please enter the value in first field, or tick N/A if not applicable)

£  N/A

## Bank Loan no. 3

(please enter the value in first field, or tick N/A if not applicable)

£  N/A



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