

CLIENT OVERVIEW FORM

1 CLIENT STATUS

Legal Partnership

Blended Family

Cohabiting

Single

The documents we will provide based on this completed form will be produced without direct instructions or a full review of the specific facts and should not be relied upon as legal and/or financial advice. Any use of the documents are at the recipients own risk and they are strongly advised to seek independent advice before execution.

2 CLIENT DETAILS

Client 1

Full Name

Age

UK long-term resident for IHT purposes Yes

No

If the client is widowed, was the deceased spouse's NRB used?

Yes

No

N/A

LPA in place?

Yes

No

Client 2

Full Name

Age

UK long-term resident for IHT purposes Yes

No

If the client is widowed, was the deceased spouse's NRB used?

Yes

No

N/A

LPA in place?

Yes

No

3 CHILDREN DETAILS

Name	Age	Country of residence? (if not the UK)	Settlor 1 natural/ legally adopted	Settlor 2 natural/ legally adopted	Both
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4 PRIMARY AIMS

Bloodline protection

Yes

No

Generational IHT

Yes

No

Other aims/points of note

5 CLIENT'S ESTATE VALUES

Please provide approximate values to ensure that we can confirm the most approximate planning.

Assets	First Settlor	Second Settlor	Joint Assets
Primary Property	£	£	£
UK Holiday Home	£	£	£
BTL Property(ies)	£	£	£
Overseas Property - Is there a foreign Will for the property?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Business Relief Qualifying Assets	£	£	
Non Qualifying Business Assets	£	£	
Nature of Business			
Investments	£	£	£
Savings & Cash	£	£	£
Total Property & Assets	£	£	£

Pensions/DIS	First Settlor	Second Settlor
Pension	£	£
DIS Value	£	£
Death benefits already directed to trust?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

	First Settlor	Second Settlor	Joint Assets
Total Property, Assets, Pensions and DIS	£	£	£

Life Assurance	First Settlor	Second Settlor	Joint Assets
Personal Life Cover	£	£	£
Already in Trust	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Solidus IEP Ltd (**Solidus**) is fully committed to full compliance with the requirements of the General Data Protection Regulations (**GDPR**) and will follow procedures which aim to ensure that all employees and legal and professional partners, who have access to any personal data held by on behalf of Solidus, are fully aware of and abide by their duties under GDPR.

Please return this application to:

support@solidustrusts.co.uk