SOLIDUS

LIFE INTEREST TRUST FULFILMENT

If a deceased client has a Life Interest Trust in the Will then it is the duty of the Executors to transfer the assets to the Trustees of the Life Interest Trust under the terms of the Will (after Grant of Probate is obtained). The Executors cannot ignore the Life Interest Trust as they will be failing in their duties. It is then the Trustees' responsibility to manage the Trust property and act in the Beneficiaries' interests.

Please note: if the application is not fully completed, the application will not be processed. Finalised IHT form information is essential and we cannot proceed without it

Please note Solidus will rely upon the valuations provided and has no responsibility for their accuracy.

If the application is not fully and clearly completed it will cause delays or be returned.

Checklist: The following information MUST be included

Solidus Reference (if applicable) e.g. 1234_abc	☐	
Copy of the IHT 205/400 forms	☐	
Copy of the Will and any Codicils	☐	
Copy of the Death Certificate	☐	
Copy of the Grant of Probate	☐	
"Red Book" Property Valuation	☐	
AML for Trustees	☐	

Deceased's name

Full name

Date of Death

Surviving Spouse

Title

Full name

Address

Tel.

Postcode

ASSETS TO BE TRANSFERRED TO THE TRUST

Please provide accurate values of the estate assets

Value of main residence	£
Value of liquid assets	£
Other	£
Total estate value	£

Trustee names/addresses have changed?
(if yes, please add changes in the notes space provided below)

Yes ☐ No ☐

Please note any name or address changes of Trustees:

Further notes:

DATA PROTECTION STATEMENT

Solidus IEP Ltd (“**Solidus**”) is totally committed to full compliance with the requirements of the General Data Protection Regulations (“**GDPR**”) and the Data Protection Act 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 or on behalf of Solidus, are fully aware of and abide by their duties under GDPR.

Solidus, in respect of its business purpose, needs to collect and use information from Licensees and their referred clients in order to operate and carry out its function. This information is handled and dealt with properly however it is collected, recorded and used and whether it is held on paper or within computer data records.

CLIENT AUTHORISATION

We hereby instruct Solidus to draft the relevant documents and Deeds to fulfil the Life Interest Trust.

We hereby instruct Solidus to draft the relevant documentation and acknowledge that Solidus will instruct their legal partners to review the drafted documentation. We agree to pay the costs even if we fail to complete the planning.

For the purpose of compliance with Data Protection Laws, we consent to Solidus holding our personal details, together with those of all parties named in our planning. These details will only be used by Solidus for the purpose of this planning and will never be sold to or shared with third parties for the purpose of marketing.

Following the completion of this planning, we authorise Solidus or their legal partners to contact us directly if there is a requirement which we, or the Trustees, need to be made aware of.

Print Name	
Signature	
Date	
Print Name	
Signature	
Date	

ADVISER'S CONFIRMATION

As the Financial Adviser to the above clients I confirm that I have discussed the purpose and details of life interest fulfilment. I understand that I am responsible for the advice, signing and witnessing of the documentation.

I agree to all aspects of the planning being reviewed by Solidus' legal partners if required.

Please prepare the documentation under existing law and I accept Solidus' Terms of Engagement which are available in the Licensee area of their Website.

Sending this application form via email, with or without signature, also constitutes my agreement to the above terms.

Print Name	
Signature	
Date	

NEXT STAGES

1. We will confirm the required instructions. We will then draft the required documents and share them with our legal partners.

2. Once we have our legal partners approval, we will prepare final documents.

3. Final documents are then sent to the Financial Adviser.

4. Documents will be returned to Solidus for verification.

5. Solidus will then either store the documents with the client's other documentation or send them back to the Financial Adviser.

Please return this application to:

By post:	By email:
Solidus IEP Ltd, Premier House, 1-5 Argyle Way, Stevenage, SG1 2AD	applications@solidustrusts.co.uk