**Client Overview Form (2 pages)**

|  |  |  |
| --- | --- | --- |
|  | **Client 1** | **Client 2** |
| **Family Name** |       |       |
| **Forename(s)** |       |       |
| **Marital Status** |  |  |
| **Age** |       |       |
| **UK Domicile for IHT?** | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |
| **If the client is widowed was the deceased’s spouse's NRB used?** | Yes [ ]  No [ ]  N/A [ ]  | Yes [ ]  No [ ]  N/A [ ]  |
| **LPA in place?** | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |

|  |
| --- |
| **Children** |
| **Name** | **Age** | **Country of residence if not UK?** | **Child of Client 1 only** | **Child of Client 2 only** | **Joint Child** |
|       |  |       | [ ]  | [ ]  | [ ]  |
|       |  |       | [ ]  | [ ]  | [ ]  |
|       |  |       | [ ]  | [ ]  | [ ]  |
|       |  |       | [ ]  | [ ]  | [ ]  |

|  |
| --- |
| **Primary Aims** |
| **Bloodline Protection:** Yes [ ]  No [ ]  | **Generational IHT:** Yes [ ]  No [ ]  |
| **Other Aims/Points of Note:**      |

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 or on behalf of Solidus, are fully aware of and abide by their duties under GDPR.

**Submit this form to** **support@solidustrusts.co.uk** **and we will respond with the relevant advice and recommendations**

**normally within five working days.**

**Client’s Estate Values**

|  |  |  |  |
| --- | --- | --- | --- |
| **NET ASSETS** | **Client 1** | **Client 2** | **Joint Assets** |
| **Primary Property**  |       |       |       |
| **UK Holiday Home**  |       |       |       |
| **BTL Property(ies)** |       |       |       |
| **Overseas Property****Is there a foreign Will for the Property?** |      Yes [ ]  No [ ]  |      Yes [ ]  No [ ]  |      Yes [ ]  No [ ]  |
| **BPR qualifying business assets** |       |       |  |
| **Non BPR business assets** |       |       |  |
| **Nature of business** |       |       |  |
| **Investments** |       |       |       |
| **Savings & Cash** |       |       |       |
| **Total Assets** | £0.00 | £0.00 | £0.00 |
| **LIFE ASSURANCE** | **Client 1** | **Client 2** | **Joint** |
| **Personal Life Cover** |       |       |       |
| Already in trust? | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |
| **PENSIONS** | **Client 1** | **Client 2** |  |
| **Pensions/SIPP** |       |       |  |
| Death benefit already directed to trust?  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |  |
| **Death in Service** (not directed to trust) |       |       |  |

**Notes:**