**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**](mailto: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:**