

TRUST & PROBATE

INFORMATION REQUIRED

TRUST VARIATIONS

- A copy of the Will/Trust instrument.
- Statement of the trust asset values and the income being generated.
- If property is involved an open market rent on a shorthold assured tenancy basis may need to be estimated.
- Dates of birth of life tenant(s).
- Dates of birth of non-charity reversionary beneficiaries.
- A completed medical questionnaire (available on this site).
- Details of any IHT complications.
- Details of the basis of the taxation of the trust on an ongoing basis and on any variation.