



Estate Calculation Form

Before meeting a professional adviser, it is helpful to list your main assets and to calculate the value of your estate. Complete this table before seeking advice.

What you own:

House (*include whether this is sole or joint ownership and how it is registered*)

	£
Other Property	£
Personal effects e.g. car, furniture, pictures, jewellery	£
Cash	£
Bank and Building Society Accounts	£
Stocks, Share and Unit Trusts and other UK Investments	£
National Savings	£
Life Policies/savings plans	£
Any money owed to you	£
Overseas investments	£
Business Interests	£

Total Assets £

Deduct your liabilities

Any outstanding mortgages	£
Any bank overdrafts	£
Credit card balances	£
Unpaid bills	£
Other commitments (<i>hire purchase agreements etc</i>)	£

Total Liabilities £

Total value of your assets minus liabilities at current prices £