

## 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 amount on your mortgages

£

Any bank overdrafts

£

Credit cars debits

£

Unpaid bills

£

Other commitments (*hire purchase agreements etc*)

£

### Total Liabilities

£

### Total value of your assets minus liabilities at current prices

£

