

INHERITANCE TAX CALCULATOR

By completing the Inheritance Tax Calculator below you will have a fair indication of whether or not your family has a potential Inheritance Tax liability.

	£
Your Assets	
Market value of family home	
Contents and personal effects	
Savings and investments (including endowments, PEPs and ISAs)	
Other assets (Business, car, boat, second home, trusts, etc.)	
Money owed to you	
Total assets	_____
Your liabilities	=====
Outstanding mortgage on your home	
Bank loans/overdraft	
Credit cards/hire purchase	
Other liabilities	
Total liabilities	_____
	=====
Taxable value of estate (Assets less liabilities)	
Less £325,000 nil rate band (2009/10)	325,000

Net estate	=====

Your family's potential Inheritance Tax liability (Net estate x 40%)	=====

“ ... not just numbers

AUDIT

ACCOUNTS

TAXATION

BUSINESS SUPPORT

CORPORATE FINANCE

STRATEGIC DEVELOPMENT

For a consultation, without obligation, to assess your current or potential liability to Inheritance Tax, please call David Bowler on 01332344246.