

Confirmation

Your name and address

Your reference

HMRC reference

About the person who has died

Surname

Forenames

Date of death

Title

Occupation

Date of birth

Place of death

Address

Postcode

Testate/Intestate
(delete as appropriate)

**Total estate for
Confirmation**

£

Executors

Full name(s) and address(es). If nominate, list in order shown in the Will, etc.

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Recorded in the Court Books of the
along with relative Deeds

Declaration by

1. who declares that the deceased (full name)

died on the date and at the place shown on page 1

domiciled in

2. That I am

3. That I/ _____ have entered or am/are about to enter, upon possession and management of the deceased's estate as Execut _____ foresaid along with the said

4. That I do not know of any testamentary settlement or writing relating to the disposal of the deceased's estate or any part of the deceased's estate other than that mentioned in paragraph 2.

5. That the Inventory (on pages 3 -) is a full and complete Inventory of the:

- heritable estate in Scotland belonging to the deceased or the destination of which (s)he had the power to and did evacuate
- moveable estate of the deceased in Scotland
- real and personal estate of the deceased in England and Wales and in Northern Ireland
- estate of the deceased situated elsewhere

including property, other than settled property, over which (s)he had and exercised an absolute power of disposal.

6. That confirmation of the estate in Scotland, England and Wales and Northern Ireland amounting in value to £ _____ is required.

To the best of my knowledge and belief the information I have given in this form is correct and complete.

Signature

Date

Warning to Executors

You may be liable to penalties or prosecution if you fail to make full enquiries and to include all property on which Inheritance Tax is payable.

Inventory

Inventory of:

- the heritable estate in Scotland belonging to the deceased or the destination of which (s)he had power to and did evacuate
- the moveable estate of the deceased in Scotland
- the real and personal estate of the deceased in England, Wales and Northern Ireland
- the estate of the deceased situated elsewhere.

Include property, other than settled property, over which the deceased had and exercised an absolute power of disposal.

List the estate under these headings and in this order

Estate in Scotland (heritable property first)

Estate in England and Wales

Estate in Northern Ireland

Summary for confirmation

Estate elsewhere (say in which country).

<i>Item No</i>	<i>Description</i>	<i>Price of shares</i>	<i>£</i>
		<i>Carried forward</i>	

1. Value of estate for Confirmation

Gross value of estate	1.1	£ <input type="text"/>
Less: funeral expenses	1.2	£ <input type="text"/>
standard security/mortgage	1.3	£ <input type="text"/>
other debts and liabilities	1.4	£ <input type="text"/>
Net value of estate	1.5	£ <input type="text"/>

2. About the deceased (if you have completed a form IHT400 do not complete sections 2 and 3; go to section 4)

At the time of death was the deceased

a	married or in a civil partnership	
b	single	
c	divorced or former civil partner	
d	widowed or surviving civil partner	a, b, c or d <input type="checkbox"/>

Surviving relatives

Spouse or civil partner	<input type="checkbox"/>	Parent	<input type="checkbox"/>	Sister(s)/brother(s)	<input type="checkbox"/>
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Number of children/grandchildren who survived the deceased

Children	<input type="text"/>	Grandchildren	<input type="text"/>
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Tax district and reference for the deceased

District UTR NINO

3. Gross value of estate for Inheritance Tax (see page 21 of C3)

Net value of estate for Inheritance Tax	A	£ <input type="text"/>
Net qualifying value of estate	B	£ <input type="text"/>
	C	£ <input type="text"/>

4. For Inheritance Tax, is the estate

- an excepted estate **D** **or**
- an exempt and excepted estate **E**

Or has form IHT400 been submitted to HMRC? **F**

5. Summary of amounts to be paid before Confirmation

Tax and interest now being paid which may not be paid by instalments (box 117 on form IHT400, or box 63 on form IHT400 Calculation)	£ <input type="text"/>
Tax and interest now being paid which may be paid by instalments (box 62 on form IHT400 Calculation)	£ <input type="text"/>
Total tax and interest now being paid	£ <input type="text"/>

For HMRC use only

Received this day the sum of
£ _____

For Inheritance Tax and interest thereon

HMRC Cashiers

For Commissioners of
HM Revenue & Customs

The stamp and receipt are provisional. The Inventory will be examined after it has been recorded and the amount of tax will then be adjusted if appropriate.