

# IHT CONFIDENTIAL

## Questionnaire



	SELF	PARTNER
Name:		
Email:		
Date of Birth:		

### CHILDREN

NAME	DATE OF BIRTH	MARITAL STATUS

### GRANDCHILDREN

NAME	DATE OF BIRTH	MARITAL STATUS

ASSETS	SELF	PARTNER
Home		
Other property		
Bank/Building society Deposits		
Investment shares/Bonds/PEP/ISA		
Business Interest		
Anticipated Inheritance		
Life assurance & Pensions		
Other		

LIABILITIES	SELF	PARTNER
Mortgage		
Personal Credit (Loans, cards etc.)		
Other liabilities/guarantees		