

Record of Gifts

This record of gifts will be of great help to those dealing with your affairs with HMRC after you have passed away. There are generally 3 types of gift made for IHT purposes: those that are exempt; those that are potentially exempt and those that are chargeable lifetime transfers. The sequencing of gifts and the time of your passing may have an impact on how your estate is treated for inheritance tax. If you would like any further details please speak to your financial adviser at Beckford James.
 Helpful link - <https://www.gov.uk/inheritance-tax/gifts>

Your Name:

Date of Gift	Tax Year of Gift <i>e.g. 2020/21</i>	Recipient of Gift	Relationship of Recipient <i>i.e. Daughter, Son, Charity</i>	Description of Assets Gifted <i>i.e. Cash, Shares, Property</i>	Was the Gift made in Trust <i>Yes or No</i>	Value of Gift

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