

2 Minute Health Check System

2 Minute Inheritance Tax Planning Health Check

		All OK	Needs attention	Urgent!
1.	Do you know the value of your estate on death?	Yes	Don't know	No
2.	Have you prepared a tax efficient will?	Yes	Don't know	No
3.	Have you considered giving life time gifts?	Yes	Don't know	No
4.	Have you used your life time transfer exemptions?	Yes	Don't know	No
5.	Have you used your annual exemption?	Yes	Don't know	No
6.	Have you considered transfers between spouses?	Yes	Don't know	No
7.	Have you considered the use of Trusts to mitigate IHT effects	Yes	Don't know	No

Action Points

		Completed
1.		
2.		
3.		
4.		
5.		
6.		
7.		