

Supplement 5 – Gifts (including Property) and Legacies

Client Surname		First Names	
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- All gifts shall be stated to be free of any taxes unless you state otherwise - please state in office notes
- Please affix this supplementary form to the instruction and tick the appropriate box on front page
- If a gift is made to a charity, please quote the charity number
- If the gift is the content of a bank or building society account, a share portfolio or an investment, please quote the account/policy numbers.

Gift of Property - Address	
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Do you wish the gift of property to be free of any mortgage i.e. mortgage is payable from the residue?	Yes/No
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How do you hold the property?	SOLELY / JOINTLY
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Beneficiary Name	
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Address	
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	Postcode
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Relationship to T1	Relationship to T2
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Gift to pass on death of:	1 st Testator / 2 nd Testator / After both deaths	Under 18?	YES / NO
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Description of Gift	
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Beneficiary Name	
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Address	
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	Postcode
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Relationship to T1	Relationship to T2
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Gift to pass on death of:	1 st Testator / 2 nd Testator / After both deaths	Under 18?	YES / NO
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Description of Gift	
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Beneficiary Name	
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Address	
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	Postcode
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Relationship to T1	Relationship to T2
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Gift to pass on death of:	1 st Testator / 2 nd Testator / After both deaths	Under 18?	YES / NO
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Description of Gift	
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Beneficiary Name	
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Address	
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	Postcode
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Relationship to T1		Relationship to T2	
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Gift to pass on death of:	1 st Testator / 2 nd Testator / After both deaths	Under 18?	YES / NO
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Description of Gift	
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Beneficiary Name	
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Address	
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		Postcode	
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Relationship to T1		Relationship to T2	
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Gift to pass on death of:	1 st Testator / 2 nd Testator / After both deaths	Under 18?	YES / NO
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Description of Gift	
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Beneficiary Name	
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Address	
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		Postcode	
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Relationship to T1		Relationship to T2	
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Gift to pass on death of:	1 st Testator / 2 nd Testator / After both deaths	Under 18?	YES / NO
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