

IHT Forms



Where the IHT400 pulls information from within Troika

Overview

The IHT400 form pulls information in from Troika, predominantly entered under two menu options, **Estate Details – Edit**, and **Load Data**. This document confirms each and every field within the current full IHT400 integrated form, and exactly where the information comes from within Troika. This will assist in the event of query.

IHT400 – Inheritance Tax Account (version HMRC 09/20)

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| Box 1 | Title | Entity Details of deceased > General tab > Title |
| | Surname | Entity Details of deceased > General tab > Surname |
| | First name(s) | Entity Details of deceased > General tab > Forenames |
| Box 2 | | Entity Details of deceased > Individual tab > Date of Death |
| Box 3 | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 4 | | Entity Details of deceased > General tab > Male/Female |
| Box 5 | | Estate Details – Edit > Deceased Details tab > Date of Birth |
| Box 6 | | Estate Details – Edit > Deceased Details tab > Domicile |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT400_7 |
| Box 8 | | Estate Details – Edit > Deceased Details tab > Marital Status |
| Box 9 | | Estate Details – Edit > Deceased Details tab > Effective Date |
| Box 10 | A spouse or civil partner | Estate Details – Edit > Family Details tab |
| | Brothers or sisters | Estate Details – Edit > Family Details tab |
| | Parents | Estate Details – Edit > Family Details tab |
| | Children tick | Estate Details – Edit > Family Details tab > Children > Surviving Deceased |
| | Children number | Estate Details – Edit > Family Details tab > Children > Total, if “Surviving Deceased” is ticked |
| | Grandchildren tick | Estate Details – Edit > Family Details tab > Grandchildren > Surviving Deceased |
| | Grandchildren number | Estate Details – Edit > Family Details tab > Grandchildren > Total, if “Surviving Deceased” is ticked |
| Box 11 | Postcode | Estate Details – Edit > Deceased Details tab > Deceased Address |
| | House number | Estate Details – Edit > Deceased Details tab > Deceased Address |

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| | Rest of address | Estate Details – Edit > Deceased Details tab > Deceased Address |
| Box 12 | Yes/No | Load Data > Assets/Liabs > Subsection IHT400_12 |
| | Details | Load Data > Assets/Liabs > Subsection IHT400_12 |
| Box 13 | | Estate Details – Edit > Deceased Details tab > Occupation |
| Box 14 | | Estate Details – Edit > Deceased Details tab > NI Number |
| Box 15 | | Estate Details – Edit > Deceased Details tab > Tax Reference |
| Box 16 | | Estate Details – Edit > Deceased Details tab > Power of Attorney in Force |
| Box 17 | Name of firm or person dealing with the estate | Estate Details – Edit > Administrative Details tab > Name of person or firm dealing with estate |
| | Postcode | Entity Details of person or firm dealing with estate > Address tab > Form Address |
| | House or building number | Entity Details of person or firm dealing with estate > Address tab > Form Address |
| | Rest of address | Entity Details of person or firm dealing with estate > Address tab > Form Address |
| Box 18 | | Estate Details – Edit > Administrative Details tab > Contact |
| Box 19 | | Entity Details of contact at person or firm dealing with estate > General tab > Telephone If not present, Entity Details of person or firm dealing with estate > General tab > Telephone |
| Box 20 | | Entity Details of deceased > General tab > Your Ref. |
| Box 21 | | Load Data > Assets/Liabs > Subsection IHT400_23 |
| Box 22 | | Load Data > Assets/Liabs > Subsection IHT400_23 |
| Box 23 | | Load Data > Assets/Liabs > Subsection IHT400_23 |
| Box 24 | | Estate Details – Edit > Deceased Details tab > Date of Will |
| Box 25 | | Load Data > Assets/Liabs > Subsection IHT400_26 |
| Box 26 | | Load Data > Assets/Liabs > Subsection IHT400_26 |
| Box 27 | | Load Data > Assets/Liabs > Subsection IHT400_28 |
| Box 28 | | Load Data > Assets/Liabs > Subsection IHT400_28 |
| Box 29a | | Estate Details – Edit > Inheritance Tax Account tab > 435 ticked |
| Box 29b | | Estate Details – Edit > Inheritance Tax Account tab > 436 ticked |
| Box 29c | | Estate Details – Edit > Inheritance Tax Account tab > 402 ticked |
| Box 30 | | Estate Details – Edit > Inheritance Tax Account tab > 403 ticked |
| Box 31 | | Estate Details – Edit > Inheritance Tax Account tab > 404 ticked |
| Box 32 | | Estate Details – Edit > Inheritance Tax Account tab > 405 ticked |

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| Box 33 | | Estate Details – Edit > Inheritance Tax Account tab > 406 ticked |
| Box 34 | | Estate Details – Edit > Inheritance Tax Account tab > 407 ticked |
| Box 35 | | Estate Details – Edit > Inheritance Tax Account tab > 408 ticked |
| Box 36 | | Estate Details – Edit > Inheritance Tax Account tab > 409 ticked |
| Box 37 | | Estate Details – Edit > Inheritance Tax Account tab > 410 ticked |
| Box 38 | | Estate Details – Edit > Inheritance Tax Account tab > 411 ticked |
| Box 39 | | Estate Details – Edit > Inheritance Tax Account tab > 412 ticked |
| Box 40 | | Estate Details – Edit > Inheritance Tax Account tab > 413 ticked |
| Box 41 | | Estate Details – Edit > Inheritance Tax Account tab > 414 ticked |
| Box 42 | | Estate Details – Edit > Inheritance Tax Account tab > 415 ticked |
| Box 43 | | Estate Details – Edit > Inheritance Tax Account tab > 416 ticked |
| Box 44 | | Estate Details – Edit > Inheritance Tax Account tab > 417 ticked |
| Box 45 | | Estate Details – Edit > Inheritance Tax Account tab > 418 ticked |
| Box 46 | | Estate Details – Edit > Inheritance Tax Account tab > 419 ticked |
| Box 47 | | Estate Details – Edit > Inheritance Tax Account tab > 420 ticked |
| Box 48 | | Automatically populated |
| Box 49 | | IHT404 > Box 5 |
| Box 50 | | IHT404 > Box 10 |
| Box 51 | | IHT405 > Box 7 > Column G |
| Box 52 | | IHT406 > Box 1 |
| Box 53 | | Load Data > Assets/Liabs > Subsection IHT400_53 |
| Box 54 | | IHT406 > Box 5 |
| Box 55 | | IHT407 > Box 6 |
| Box 56 | | IHT409 > Box 7 IHT409 > Box 15, if the answer to IHT409 > Box 12 is No Load Data > Assets/Liabs > Subsection IHT400_56 |
| Box 57 | | IHT410 > Box 6 |
| Box 58 | | Automatically calculated |
| Box 59 | | Automatically calculated |
| Box 60 | | IHT400 > Box 58 |
| Box 61 | | IHT400 > Box 59 |
| Box 62 | | IHT411 > Box 1 > Column 4 |
| Box 63 | | IHT411 > Box 2 > Column 4 |

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| Box 64 | | <p>IHT411 > Box 1 > Column 5</p> <p>IHT411 > Box 2 > Column 5</p> <p>IHT412 > Box 1 > Column 5</p> <p>IHT412 > Box 2 > Column 5</p> <p>IHT412 > Box 3 > Column 5</p> <p>IHT412 > Box 4 > Column 5</p> <p>IHT412 > Box 5 > Column 5</p> |
| Box 65 | | <p>IHT412 > Box 1 > Column 4, if the answer to Load Data > Assets/Liabs > Subsection IHT412_1 'Are you paying tax by instalments' is No</p> <p>IHT412 > Box 2 > Column 4, if the answer to Load Data > Assets/Liabs > Subsection IHT412_2 'Are you paying tax by instalments' is No</p> |
| Box 66 | | <p>IHT412 > Box 1 > Column 4, if the answer to Load Data > Assets/Liabs > Subsection IHT412_1 'Are you paying tax by instalments' is Yes</p> <p>IHT412 > Box 2 > Column 4, if the answer to Load Data > Assets/Liabs > Subsection IHT412_2 'Are you paying tax by instalments' is Yes</p> |
| Box 67 | | <p>IHT412 > Box 3 > Column 4</p> <p>IHT412 > Box 4 > Column 4</p> <p>IHT412 > Box 5 > Column 4</p> |
| Box 68 | | IHT405 > Box 8 > Column G, if the type has been entered as '1' in Load Data > Assets/Liabs > Subsection IHT405_8 > Additional Information |
| Box 69 | | <p>IHT413 > Box 7</p> <p>IHT413 > Box 18 total</p> <p>IHT405 > Box 8 > Column G, if the type has been entered as '2' in Load Data > Assets/Liabs > Subsection IHT405_8 > Additional Information</p> |
| Box 70 | | IHT405 > Box 8 > Column G, if the type has been entered as '3' in Load Data > Assets/Liabs > Subsection IHT405_8 > Additional Information |
| Box 71 | | IHT415 > Box 7 |
| Box 72 | | IHT415 > Box 9 |
| Box 73 | | IHT416 > Box 3 total |
| Box 74 | | Load Data > Assets/Liabs > Subsection IHT400_74 |
| Box 75 | | Load Data > Assets/Liabs > Subsection IHT400_75 |
| Box 76 | | Load Data > Assets/Liabs > Subsection IHT400_76 |

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| | | IHT410 > Box 8 total IHT410 > Box 11 total IHT418 > Box 21 |
| Box 77 | | Automatically calculated |
| Box 78 | | Automatically calculated |
| Box 79 | | Automatically calculated |
| Box 80 | Details | Load Data > Assets/Liabs > Subsection IHT400_80 The following subsection entries are automatically created an associated IHT400_80 entry: Load Data > Assets/Liabs > Subsection IHT419_2, if loan is noted as secured on property |
| | Amount | Load Data > Assets/Liabs > Subsection IHT400_80 The following subsection entries are automatically created an associated IHT400_80 entry: Load Data > Assets/Liabs > Subsection IHT419_2, if loan is noted as secured on property |
| | Total mortgages and secured loans | Automatically calculated |
| Box 81 | Funeral Costs | Load Data > Assets/Liabs > Subsection IHT400_81_1 |
| | Headstone | Load Data > Assets/Liabs > Subsection IHT400_81_2 |
| | Other Costs | Load Data > Assets/Liabs > Subsection IHT400_81_3 |
| | Total cost of funeral | Automatically calculated |
| Box 82 | Details | Load Data > Assets/Liabs > Subsection IHT400_82 The following subsection entries are automatically created an associated IHT400_82 entry: Load Data > Assets/Liabs > Subsection IHT419_1 Load Data > Assets/Liabs > Subsection IHT419_2, if loan is not noted as secured on property Load Data > Assets/Liabs > Subsection IHT419_3 Load Data > Assets/Liabs > Subsection IHT419_4 Load Data > Assets/Liabs > Subsection IHT419_5_2 |
| | Amount | Load Data > Assets/Liabs > Subsection IHT400_82 The following subsection entries are automatically created an associated IHT400_82 entry: Load Data > Assets/Liabs > Subsection IHT419_1 Load Data > Assets/Liabs > Subsection IHT419_2, if loan is not noted as secured on property |

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| | | Load Data > Assets/Liabs > Subsection IHT419_3 Load Data > Assets/Liabs > Subsection IHT419_4 Load Data > Assets/Liabs > Subsection IHT419_5_2 |
| | Total other liabilities | Automatically calculated |
| Box 83 | | IHT400 > Box 80 |
| Box 84 | | Automatically calculated |
| Box 85 | | Automatically calculated |
| Box 86 | | Automatically calculated |
| Box 87 | | Automatically calculated |
| Box 88 | | Automatically calculated |
| Box 89 | | Automatically calculated |
| Box 90 | | Automatically calculated |
| Box 91 | | Automatically calculated |
| Box 92 | | Load Data > Assets/Liabs > Subsection IHT400_92_1 Load Data > Assets/Liabs > Subsection IHT400_92_2 Load Data > Assets/Liabs > Subsection IHT400_92_3 Load Data > Assets/Liabs > Subsection IHT408_14 Load Data > Assets/Liabs > Subsection IHT412_1 > Additional Amounts Load Data > Assets/Liabs > Subsection IHT412_2 > Additional Amounts |
| Box 93 | | Load Data > Assets/Liabs > Subsection IHT400_93_1 Load Data > Assets/Liabs > Subsection IHT400_93_2 Load Data > Assets/Liabs > Subsection IHT400_93_3 Load Data > Assets/Liabs > Subsection IHT405_7 > Additional Amounts Load Data > Assets/Liabs > Subsection IHT412_3 > Additional Amounts Load Data > Assets/Liabs > Subsection IHT412_4 > Additional Amounts Load Data > Assets/Liabs > Subsection IHT412_5 > Additional Amounts Load Data > Assets/Liabs > Subsection IHT413_17 > Additional Amounts, related to the first 413_3 Subsection IHTentry only Load Data > Assets/Liabs > Subsection IHT413_24 > Additional Amounts, related to the first 413_3 Subsection IHTentry only Manual entry required, where more than one 413_3 Subsection IHTentry is made |
| Box 94 | | Automatically calculated |

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| Box 95 | | Automatically calculated |
| Box 96 | | Automatically calculated |
| Box 97 | | IHT417 > Box 5 |
| Box 98 | | IHT417 > Box 10 |
| Box 99 | | IHT418 > Box 12, if the answer to Load Data > Asset/Liabs > Subsection IHT418_7 questions were 'Yes' |
| Box 100 | | IHT418 > Box 17, if the answer to Load Data > Assets/Liabs > Subsection IHT418_7 questions were 'Yes' |
| Box 101 | | Load Data > Assets/Liabs > Subsection IHT400_101 |
| Box 102 | | Automatically calculated |
| Box 103 | | Automatically calculated |
| Box 104 | | IHT403 > Box 17 |
| Box 105 | | IHT418 > Box 18, if the answer to Load Data > Assets/Liabs > Subsection IHT418_7 questions were 'No' |
| Box 106 | | IHT409 > Box 32, if the date of death is between 6 April 2006 and 5 April 2007 inclusive IHT409 > Box 42, if the date of death is between 6 April 2006 and 5 April 2007 inclusive |
| Box 107 | | Automatically calculated |
| Box 108 | | Automatically calculated |
| Selection | Working out the Inheritance Tax | Load Data > Assets/Liabs > Subsection IHT400_110 |
| Box 109 | | Load Data > Assets/Liabs > Subsection IHT400_110 |
| Box 110 | Yes | Load Data > Assets/Liabs > Subsection IHT400_110 |
| | Total value of assets | Load Data > Assets/Liabs > Subsection IHT400_110 |
| Box 111 | | Automatically calculated |
| Box 112 | | Load Data > Assets/Liabs > Subsection IHT400_110 |
| Box 113 | | Load Data > Assets/Liabs > Subsection IHT400_110 |
| Box 114 | | Load Data > Assets/Liabs > Subsection IHT400_110 |
| Box 115 | | Automatically calculated |
| Box 116 | | Load Data > Assets/Liabs > Subsection IHT400_110 |
| Box 117 | | Automatically calculated |
| Box 118 | | Automatically calculated |
| Box 119 | | Automatically calculated |
| Box 120 | | Estate Details – Edit > Inheritance Tax Account tab > 423 ticked |
| Box 121 | Grant | Estate Details – Edit > Administrative Details tab > Type of Grant |

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| | IHT401 | Estate Details – Edit > Inheritance Tax Account tab > 401 ticked |
| | IHT402 | Estate Details – Edit > Inheritance Tax Account tab > 402 ticked |
| | IHT403 | Estate Details – Edit > Inheritance Tax Account tab > 403 ticked |
| | IHT404 | Estate Details – Edit > Inheritance Tax Account tab > 404 ticked |
| | IHT405 | Estate Details – Edit > Inheritance Tax Account tab > 405 ticked |
| | IHT406 | Estate Details – Edit > Inheritance Tax Account tab > 406 ticked |
| | IHT407 | Estate Details – Edit > Inheritance Tax Account tab > 407 ticked |
| | IHT408 | Estate Details – Edit > Inheritance Tax Account tab > 408 ticked |
| | IHT409 | Estate Details – Edit > Inheritance Tax Account tab > 409 ticked |
| | IHT410 | Estate Details – Edit > Inheritance Tax Account tab > 410 ticked |
| | IHT411 | Estate Details – Edit > Inheritance Tax Account tab > 411 ticked |
| | IHT412 | Estate Details – Edit > Inheritance Tax Account tab > 412 ticked |
| | IHT413 | Estate Details – Edit > Inheritance Tax Account tab > 413 ticked |
| | IHT414 | Estate Details – Edit > Inheritance Tax Account tab > 414 ticked |
| | IHT415 | Estate Details – Edit > Inheritance Tax Account tab > 415 ticked |
| | IHT416 | Estate Details – Edit > Inheritance Tax Account tab > 416 ticked |
| | IHT417 | Estate Details – Edit > Inheritance Tax Account tab > 417 ticked |
| | IHT418 | Estate Details – Edit > Inheritance Tax Account tab > 418 ticked |
| | IHT419 | Estate Details – Edit > Inheritance Tax Account tab > 419 ticked |
| | IHT420 | Estate Details – Edit > Inheritance Tax Account tab > 420 ticked |
| | IHT421 | Manual entry required |
| | IHT430 | Estate Details – Edit > Inheritance Tax Account tab > 430 ticked |
| | IHT435 | Estate Details – Edit > Inheritance Tax Account tab > 435 ticked |
| | IHT436 | Estate Details – Edit > Inheritance Tax Account tab > 436 ticked |
| | C1 | Manual entry required |
| | Boxes in the account that are provisional here | Any load data entry which has been made with the 'Estimate' tick box ticked will have its Subsection IHTdisplayed here |
| Declaration | Surname 1 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of first Personal Representative > General tab > Surname |
| | First name(s) 1 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of first Personal Representative > General tab > Forenames |

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| | Date of birth 1 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of first Personal Representative > Individual tab > Date of Birth |
| | National Insurance number 1 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of first Personal Representative > Individual tab > NI Number |
| | Phone number 1 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of first Personal Representative > General tab > Telephone |
| | Address and Postcode 1 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of first Personal Representative > Address tab > Form Address |
| | Signature 1 | Manual signature required |
| | Date 1 | Manual entry required |
| | Surname 2 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of second Personal Representative > General tab > Surname |
| | First name(s) 2 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of second Personal Representative > General tab > Forenames |
| | Date of birth 2 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of second Personal Representative > Individual tab > Date of Birth |
| | National Insurance number 2 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of second Personal Representative > Individual tab > NI Number |
| | Phone number 2 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of second Personal Representative > General tab > Telephone |
| | Address and Postcode 2 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of second Personal Representative > Address tab > Form Address |
| | Signature 2 | Manual signature required |

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| | Date 2 | Manual entry required |
| | Surname 3 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of third Personal Representative > General tab > Surname |
| | First name(s) 3 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of third Personal Representative > General tab > Forenames |
| | Date of birth 3 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of third Personal Representative > Individual tab > Date of Birth |
| | National Insurance number 3 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of third Personal Representative > Individual tab > NI Number |
| | Phone number 3 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of third Personal Representative > General tab > Telephone |
| | Address and Postcode 3 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of third Personal Representative > Address tab > Form Address |
| | Signature 3 | Manual signature required |
| | Date 3 | Manual entry required |
| | Surname 4 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of fourth Personal Representative > General tab > Surname |
| | First name(s) 4 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of fourth Personal Representative > General tab > Forenames |
| | Date of birth 4 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of fourth Personal Representative > Individual tab > Date of Birth |
| | National Insurance number 4 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of fourth Personal Representative > Individual tab > NI Number |

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| | Phone number 4 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of fourth Personal Representative > General tab > Telephone |
| | Address and Postcode 4 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of fourth Personal Representative > Address tab > Form Address |
| | Phone number 4 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of fourth Personal Representative > General tab > Telephone |
| | Signature 4 | Manual signature required |
| | Date 4 | Manual entry required |
| Checklist | | Manual entry required |
| Additional Information | | Load Data > Assets/Liabs > Subsection IHT400_7 Load Data > Assets/Liabs > Subsection IHT400_76 Load Data > Assets/Liabs > Subsection IHT400_92_1 Load Data > Assets/Liabs > Subsection IHT400_92_2 Load Data > Assets/Liabs > Subsection IHT400_92_3 Load Data > Assets/Liabs > Subsection IHT400_93_1 Load Data > Assets/Liabs > Subsection IHT400_93_2 Load Data > Assets/Liabs > Subsection IHT400_93_3 Load Data > Assets/Liabs > Subsection IHT400_101 Load Data > Assets/Liabs > Subsection IHT412_1 Load Data > Assets/Liabs > Subsection IHT412_2 Load Data > Assets/Liabs > Subsection IHT412_3 Load Data > Assets/Liabs > Subsection IHT412_4 Load Data > Assets/Liabs > Subsection IHT412_5 Manual entry also available |

IHT400 Calculation (version HMRC 12/19)

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| Box 1 | | Automatically calculated |
| Box 2 | | IHT402 > Box 20 |
| Box 3 | | Automatically calculated |
| Box 4 | | IHT403 > Box 7 Manual entry required (of zero, where IHT403 > Box 7 not applicable) |

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| Box 5 | | Automatically calculated |
| Box 6 | | IHT400 > Box 108 |
| Box 7 | | IHT435 > Box 25 |
| Box 8 | | IHT400Calc > Box 5 |
| Box 9 | | Automatically calculated |
| Box 10 | | Automatically calculated |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT400Calc_16 |
| Box 12 | | Load Data > Assets/Liabs > Subsection IHT400Calc_16 |
| Box 13 | | Load Data > Assets/Liabs > Subsection IHT400Calc_16 |
| Box 14 | | Automatically calculated |
| Box 15 | | Load Data > Assets/Liabs > Subsection IHT400Calc_16 |
| Box 16 | | Automatically calculated |
| Box 17 | | Load Data > Assets/Liabs > Subsection IHT400Calc_16 |
| Box 18 | | Automatically calculated |
| Box 19 | | Automatically calculated |
| Box 20 | | Load Data > Assets/Liabs > Subsection IHT400Calc_34 |
| Box 21 | | Load Data > Assets/Liabs > Subsection IHT400Calc_34 |
| Box 22 | | Automatically calculated |
| Box 23 | | Automatically calculated |
| Box 24 | | Load Data > Assets/Liabs > Subsection IHT400Calc_34 |
| Box 25 | | Load Data > Assets/Liabs > Subsection IHT400Calc_34 |
| Box 26 | | Automatically calculated |
| Box 27 | | Automatically calculated |
| Box 28 | | Load Data > Assets/Liabs > Subsection IHT400Calc_34 |
| Box 29 | | Load Data > Assets/Liabs > Subsection IHT400Calc_51 |
| Box 30 | | Load Data > Assets/Liabs > Subsection IHT400Calc_34 |
| Box 31 | | IHT400Calc > Box 19 |
| Box 32 | | IHT400Calc > Box 6 |
| Box 33 | | Automatically calculated |
| Box 34 | | Automatically calculated |
| Box 35 | | Load Data > Assets/Liabs > Subsection IHT400Calc_34 |
| Box 36 | | Automatically calculated |
| Box 37 | | Automatically calculated |

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| Box 38 | | Automatically calculated |
| Box 39 | | Automatically calculated |
| Box 40 | | Load Data > Assets/Liabs > Subsection IHT400Calc_51 |
| Box 41 | | Automatically calculated |
| Box 42 | | Automatically calculated |
| Box 43 | | Load Data > Assets/Liabs > Subsection IHT400Calc_51 |
| Box 44 | | Load Data > Assets/Liabs > Subsection IHT400Calc_51 |
| Box 45 | | Load Data > Assets/Liabs > Subsection IHT400Calc_51 |
| Box 46 | | Load Data > Assets/Liabs > Subsection IHT400Calc_51 |
| Box 47 | | Automatically calculated |
| Box 48 | | IHT400Calc > Box 19 |
| Box 49 | | IHT400Calc > Box 6 |
| Box 50 | | Automatically calculated |
| Box 51 | | Automatically calculated |
| Box 52 | | Load Data > Assets/Liabs > Subsection IHT400Calc_51 |
| Box 53 | | Automatically calculated |
| Box 54 | | Automatically calculated |
| Box 55 | | Automatically calculated |
| Box 56 | | Automatically calculated |
| Box 57 | | Load Data > Assets/Liabs > Subsection IHT400Calc_60 |
| Box 58 | | <p>Automatically calculated</p> <p>NB We are aware that the results calculated by HMRC in this field differ to results given using the Calculator at http://www.hmrc.gov.uk/tools/inheritancetax/interest-rate-calculator.htm, however thewealthworks have no power to amend this.</p> |
| Box 59 | | <p>Automatically calculated</p> <p>NB We are aware that the results calculated by HMRC in this field differ to results given using the Calculator at http://www.hmrc.gov.uk/tools/inheritancetax/interest-rate-calculator.htm, however thewealthworks have no power to amend this.</p> |
| Box 60 | | <p>Automatically calculated, where a number is present within IHT400Calc > Box 25</p> <p>Where IHT400Calc > Box 25 is 0, manual entry is required</p> |
| Box 61 | | Automatically calculated |
| Box 62 | | Automatically calculated |

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| Box 63 | | Automatically calculated |
| Box 64 | | Automatically calculated |
| Box 65 | | Automatically calculated |

IHT401 – Domicile outside the United Kingdom (version HMRC 05/20)

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| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT401_4 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT401_4 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT401_4 |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT401_4 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT401_5 |
| Box 6 | No/Yes | Load Data > Assets/Liabs > Subsection IHT401_6 |
| | From/To From/To | Load Data > Assets/Liabs > Subsection IHT401_6 |
| Box 7 | Town | Load Data > Assets/Liabs > Subsection IHT401_11 |
| | Country | Load Data > Assets/Liabs > Subsection IHT401_11 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT401_11 |
| Box 9 | | Load Data > Assets/Liabs > Subsection IHT401_11 |
| Box 10 | | Load Data > Assets/Liabs > Subsection IHT401_11 |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT401_11_2 |
| Box 12 | | Load Data > Assets/Liabs > Subsection IHT401_17_2 |
| Box 13 | | Load Data > Assets/Liabs > Subsection IHT401_17 |
| Box 14 | | Load Data > Assets/Liabs > Subsection IHT401_17 |
| Box 15 | | Load Data > Assets/Liabs > Subsection IHT401_17 |
| Box 16 | Town | Load Data > Assets/Liabs > Subsection IHT401_17 |
| | Country | Load Data > Assets/Liabs > Subsection IHT401_17 |
| Box 17 | | Load Data > Assets/Liabs > Subsection IHT401_17 |
| Box 18 | | Load Data > Assets/Liabs > Subsection IHT401_17 |
| Box 19 | | Load Data > Assets/Liabs > Subsection IHT401_18 |

| | | |
|--------|---------------|---|
| Box 20 | | Load Data > Assets/Liabs > Subsection IHT401_20 |
| Box 21 | No/Yes | Load Data > Assets/Liabs > Subsection IHT401_21 |
| | Details | Load Data > Assets/Liabs > Subsection IHT401_21 |
| Box 22 | | Load Data > Assets/Liabs > Subsection IHT401_22 |
| Box 23 | No/Yes | Load Data > Assets/Liabs > Subsection IHT401_24 |
| | Approx. Value | Load Data > Assets/Liabs > Subsection IHT401_24 |
| Box 24 | | Load Data > Assets/Liabs > Subsection IHT401_24 |
| Box 25 | | Load Data > Assets/Liabs > Subsection IHT401_24 |

IHT402 – Claim to transfer unused nil rate band (version HMRC 09/15)

| | | |
|----------------------|------------|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | Title | Load Data > Assets/Liabs > Subsection IHT402_2 |
| | Surname | Load Data > Assets/Liabs > Subsection IHT402_2 |
| | First name | Load Data > Assets/Liabs > Subsection IHT402_2 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT402_2 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT402_4 |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT402_4 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT402_11 |
| Box 6 | | Load Data > Assets/Liabs > Subsection IHT402_11 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT402_11 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT402_11 |
| Box 9 | | Automatically calculated |
| Box 10 | | Load Data > Assets/Liabs > Subsection IHT402_11 |
| Box 11 | | Automatically calculated |
| Box 12 | | Load Data > Assets/Liabs > Subsection IHT402_12 |
| Box 13 | | Load Data > Assets/Liabs > Subsection IHT402_13 |
| Box 14 | | Load Data > Assets/Liabs > Subsection IHT402_13 |
| Box 15 | | Load Data > Assets/Liabs > Subsection IHT402_13 |

| | | |
|--------|--|---|
| Box 16 | | Automatically calculated |
| Box 17 | | Automatically calculated |
| Box 18 | | Automatically calculated |
| Box 19 | | Automatically calculated |
| Box 20 | | Automatically calculated |
| Box 21 | | Load Data > Assets/Liabs > Subsection IHT402_21 |
| Box 22 | | Load Data > Assets/Liabs > Subsection IHT402_23 |
| Box 23 | | Load Data > Assets/Liabs > Subsection IHT402_23 |

IHT403 – Gifts and other transfers of value (version HMRC 05/20)

| | | |
|----------------------|--------------------|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT403_7_1 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT403_7_1 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT403_7_1 |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT403_7_1 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT403_7_1 |
| Box 6 | | Load Data > Assets/Liabs > Subsection IHT403_7_1 |
| Page 2 | No/Yes | Load Data > Assets/Liabs > Subsection IHT403_10 |
| | Surname/Agent Name | Load Data > Assets/Liabs > Subsection IHT403_11 |
| | First names | Load Data > Assets/Liabs > Subsection IHT403_11 |
| | Phone number | Load Data > Assets/Liabs > Subsection IHT403_11 |
| | Address | Load Data > Assets/Liabs > Subsection IHT403_11_2 |
| | Postcode | Load Data > Assets/Liabs > Subsection IHT403_11_2 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT403_7_2 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT403_12 |
| Box 9 | | Load Data > Assets/Liabs > Subsection IHT403_12 |
| Box 10 | | Load Data > Assets/Liabs > Subsection IHT403_12 |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT403_12 |

| | | |
|--------|--|---|
| Box 12 | | Load Data > Assets/Liabs > Subsection IHT403_12 |
| Box 13 | | Load Data > Assets/Liabs > Subsection IHT403_16 |
| Box 14 | | Load Data > Assets/Liabs > Subsection IHT403_16 |
| Box 15 | | Load Data > Assets/Liabs > Subsection IHT403_16 |
| Box 16 | | Load Data > Assets/Liabs > Subsection IHT403_16 |
| Box 17 | | Automatically calculated |
| Box 18 | | Load Data > Assets/Liabs > Subsection IHT403_19 |
| Box 19 | | Load Data > Assets/Liabs > Subsection IHT403_19 |
| Box 20 | | Load Data > Assets/Liabs > Subsection IHT403_20 |
| Box 21 | | Load Data > Assets/Liabs > Subsection IHT403_21 |
| Box 22 | | Load Data > Assets/Liabs > Subsection IHT403_22 |

IHT404 – Jointly owned assets (version HMRC 09/15)

| | | |
|----------------------|---------|---|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | Details | Load Data > Assets/Liabs > Subsection IHT404_1 |
| Box 2 | Details | Load Data > Assets/Liabs > Subsection IHT404_2 |
| Box 3 | Total | Automatically calculated |
| Box 4 | Details | Load Data > Assets/Liabs > Subsection IHT404_4 |
| Box 5 | Total | Automatically calculated |
| Box 6 | Details | Load Data > Assets/Liabs > Subsection IHT404_6 Load Data > Assets/Liabs > Subsection IHT404_6_2 |
| Box 7 | Details | Load Data > Assets/Liabs > Subsection IHT404_7 Load Data > Assets/Liabs > Subsection IHT404_7_2 |
| Box 8 | Total | Automatically calculated |
| Box 9 | Details | Load Data > Assets/Liabs > Subsection IHT404_9 |
| Box 10 | Total | Automatically calculated |
| Box 11 | No/Yes | Load Data > Assets/Liabs > Subsection IHT404_1, if the 'Asset passes by survivorship' tick box is ticked Load Data > Assets/Liabs > Subsection IHT404_6, if the 'Asset |

| | | |
|--------|---------|--|
| | | passes by survivorship' tick box is ticked Load Data > Assets/Liabs > Subsection IHT404_6_2, if the 'Asset passes by survivorship' tick box is ticked |
| | Details | Load Data > Assets/Liabs > Subsection IHT404_1, if the 'Asset passes by survivorship' tick box is ticked Load Data > Assets/Liabs > Subsection IHT404_6, if the 'Asset passes by survivorship' tick box is ticked Load Data > Assets/Liabs > Subsection IHT404_6_2, if the 'Asset passes by survivorship' tick box is ticked |
| Box 12 | | Automatically calculated |
| Box 13 | | Automatically calculated |

IHT405 – Houses, land, buildings and interests in land (version HMRC 01/18)

| | | |
|----------------------|--------------------------|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | Title | Load Data > Assets/Liabs > Subsection IHT405_1_1 |
| | Name | Load Data > Assets/Liabs > Subsection IHT405_1_1 |
| | Postcode | Load Data > Assets/Liabs > Subsection IHT405_1_1 |
| | House or building number | Load Data > Assets/Liabs > Subsection IHT405_1_1 |
| | Address, Line 1 | Load Data > Assets/Liabs > Subsection IHT405_1_1 |
| | Address, Lines 2 to 4 | Load Data > Assets/Liabs > Subsection IHT405_1_2 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT405_6 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT405_6 |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT405_6 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT405_6 |
| Box 6 | | Load Data > Assets/Liabs > Subsection IHT405_6 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT405_7 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT405_8 |
| Box 9 | No/Yes | Load Data > Assets/Liabs > Subsection IHT405_11 |
| | Details | Load Data > Assets/Liabs > Subsection IHT405_11 |
| Box 10 | | Load Data > Assets/Liabs > Subsection IHT405_11 |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT405_11 |
| Box 12 | No/Yes | Load Data > Assets/Liabs > Subsection IHT405_12 |

| | | |
|--|---------|---|
| | Details | Load Data > Assets/Liabs > Subsection IHT405_12 |
|--|---------|---|

IHT406 – Bank and building society accounts and National Savings & Investments (version HMRC 09/15)

| | | |
|----------------------|--|---|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Bank Accounts > Subsection IHT406_1 Load Data > Bank Accounts > Subsection IHT406_1_2 Load Data > Assets/Liabs > Subsection IHT400_52 |
| Box 2 | | Load Data > Bank Accounts > Subsection IHT406_2 |
| Box 3 | | Load Data > Bank Accounts > Subsection IHT406_3 |
| Box 4 | | Load Data > Bank Accounts > Subsection IHT406_4 |
| Box 5 | | Automatically calculated |

IHT407 – Household and personal goods (version HMRC 07/18)

| | | |
|----------------------|--|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT407_1 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT407_2 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT407_3 |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT407_5 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT407_5 |
| Box 6 | | Automatically calculated |

IHT408 – Household and personal goods donated to charity (version HMRC 09/15)

| | | |
|---------|--|--|
| Name of | | Entity Details of deceased > General tab > Ent. Name |
|---------|--|--|

| | | |
|----------------------|-----------------------|--|
| deceased | | |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Declaration | Tick box | Manual entry required |
| | Details, Lines 1 to 6 | Load Data > Assets/Liabs > Subsection IHT408_05_01 |
| | Details, Lines 7 to 9 | Load Data > Assets/Liabs > Subsection IHT408_05_02 |
| | Name 1 | Load Data > Assets/Liabs > Subsection IHT408_06 |
| | Signature 1 | Manual signature required |
| | Date 1 | Manual entry required |
| | Name 2 | Load Data > Assets/Liabs > Subsection IHT408_06 |
| | Signature 2 | Manual signature required |
| | Date 2 | Manual entry required |
| | Name 3 | Load Data > Assets/Liabs > Subsection IHT408_06 |
| | Signature 3 | Manual signature required |
| | Date 3 | Manual entry required |
| | Name 4 | Load Data > Assets/Liabs > Subsection IHT408_06 |
| | Signature 4 | Manual signature required |
| | Date 4 | Manual entry required |
| Schedule of items | Details | Load Data > Assets/Liabs > Subsection IHT408_14 |
| | Total | Automatically calculated |

IHT409 – Pensions (version HMRC 09/15)

| | | |
|----------------------|--|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT409_1 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT409_5 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT409_5 |

| | | |
|--------|-------------------------------|---|
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT409_5 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT409_6_1 |
| Box 6 | Lines 1 to 5 | Load Data > Assets/Liabs > Subsection IHT409_6_1 |
| | Lines 6 and 7 | Load Data > Assets/Liabs > Subsection IHT409_6_1 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT409_7 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT409_16 |
| Box 9 | | Load Data > Assets/Liabs > Subsection IHT409_16 |
| Box 10 | | Load Data > Assets/Liabs > Subsection IHT409_16 |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT409_16 |
| Box 12 | | Load Data > Assets/Liabs > Subsection IHT409_16 |
| Box 13 | | Load Data > Assets/Liabs > Subsection IHT409_16 |
| Box 14 | | Load Data > Assets/Liabs > Subsection IHT409_16 |
| Box 15 | | Load Data > Assets/Liabs > Subsection IHT409_16 |
| Box 16 | | Load Data > Assets/Liabs > Subsection IHT409_16 |
| Box 17 | | Load Data > Assets/Liabs > Subsection IHT409_21 |
| Box 18 | | Load Data > Assets/Liabs > Subsection IHT409_21 |
| Box 19 | | Load Data > Assets/Liabs > Subsection IHT409_21 |
| Box 20 | | Load Data > Assets/Liabs > Subsection IHT409_21 |
| Box 21 | Date 1 | Load Data > Assets/Liabs > Subsection IHT409_21 |
| | Date 2 | Load Data > Assets/Liabs > Subsection IHT409_21 |
| Box 22 | | Load Data > Assets/Liabs > Subsection IHT409_24_1 |
| Box 23 | | Load Data > Assets/Liabs > Subsection IHT409_24_1 |
| Box 24 | Lines 1 to 3 | Load Data > Assets/Liabs > Subsection IHT409_24_1 |
| | Lines 4 to 8 | Load Data > Assets/Liabs > Subsection IHT409_24_2 |
| Box 25 | | Load Data > Assets/Liabs > Subsection IHT409_26 |
| Box 26 | Title | Load Data > Assets/Liabs > Subsection IHT409_26 |
| | Name | Load Data > Assets/Liabs > Subsection IHT409_26 |
| | Postcode | Load Data > Assets/Liabs > Subsection IHT409_26 |
| | House or building number | Load Data > Assets/Liabs > Subsection IHT409_26 |
| | Rest of address, Line 1 | Load Data > Assets/Liabs > Subsection IHT409_26 |
| | Rest of address, Lines 2 to 4 | Load Data > Assets/Liabs > Subsection IHT409_27 |
| Box 27 | | Load Data > Assets/Liabs > Subsection IHT409_27 |
| Box 28 | | Load Data > Assets/Liabs > Subsection IHT409_32 |

| | | |
|--------|--------------------------------|---|
| Box 29 | | Load Data > Assets/Liabs > Subsection IHT409_32 |
| Box 30 | | Load Data > Assets/Liabs > Subsection IHT409_32 |
| Box 31 | Amount | Load Data > Assets/Liabs > Subsection IHT409_32 |
| | Charity details | Load Data > Assets/Liabs > Subsection IHT409_32 |
| Box 32 | | Automatically calculated |
| Box 33 | | Load Data > Assets/Liabs > Subsection IHT409_37 |
| Box 34 | | Load Data > Assets/Liabs > Subsection IHT409_37 |
| Box 35 | | Load Data > Assets/Liabs > Subsection IHT409_37 |
| Box 36 | | Load Data > Assets/Liabs > Subsection IHT409_37 |
| Box 37 | | Load Data > Assets/Liabs > Subsection IHT409_37 |
| Box 38 | Title | Load Data > Assets/Liabs > Subsection IHT409_37 |
| | Name | Load Data > Assets/Liabs > Subsection IHT409_38 |
| | Postcode | Load Data > Assets/Liabs > Subsection IHT409_38 |
| | House or building number | Load Data > Assets/Liabs > Subsection IHT409_38 |
| | Rest of address, Lines 1 and 2 | Load Data > Assets/Liabs > Subsection IHT409_38 |
| | Rest of address, Lines 3 and 4 | Load Data > Assets/Liabs > Subsection IHT409_41 |
| Box 39 | | Load Data > Assets/Liabs > Subsection IHT409_41 |
| Box 40 | | Load Data > Assets/Liabs > Subsection IHT409_41 |
| Box 41 | Amount | Load Data > Assets/Liabs > Subsection IHT409_41 |
| | Charity details, Lines 1 to 3 | Load Data > Assets/Liabs > Subsection IHT409_41 |
| | Charity details, Line 4 | Load Data > Assets/Liabs > Subsection IHT409_42 |
| Box 42 | | Automatically calculated |

IHT410 – Life assurance and annuities (version HMRC 09/15)

| | | |
|----------------------|--|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT410_2 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT410_2 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT410_5 |

| | | |
|--------|---|---|
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT410_5 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT410_5 |
| Box 6 | | Automatically calculated |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT410_8 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT410_8 |
| Box 9 | Gross annual amount payable under the annuity | Load Data > Assets/Liabs > Subsection IHT410_8 |
| | Part of amount considered capital | Load Data > Assets/Liabs > Subsection IHT410_8 |
| | Part of amount considered income | Load Data > Assets/Liabs > Subsection IHT410_8 |
| Box 10 | | Load Data > Assets/Liabs > Subsection IHT410_11 |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT410_11 |
| Box 12 | | Load Data > Assets/Liabs > Subsection IHT410_11 |
| Box 13 | | Load Data > Assets/Liabs > Subsection IHT410_11 |
| Box 14 | | Load Data > Assets/Liabs > Subsection IHT410_11 |

IHT411 – Listed stocks and shares (version HMRC 09/15)

| | | |
|----------------------|--|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Investments > Subsection IHT411_1 Load Data > Assets/Liabs > Subsection IHT400_62 |
| Box 2 | | Load Data > Investments > Subsection IHT411_2 |

IHT412 – Unlisted stocks and shares, and control holdings (version HMRC 09/14)

| | | |
|----------------------|--|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |

| | | |
|-------|--|---|
| Box 1 | | Load Data > Investments > Subsection IHT412_1 |
| Box 2 | | Load Data > Investments > Subsection IHT412_2 |
| Box 3 | | Load Data > Investments > Subsection IHT412_3 |
| Box 4 | | Load Data > Investments > Subsection IHT412_4 |
| Box 5 | | Load Data > Investments > Subsection IHT412_5 |

IHT413 – Business and partnership interests and assets (version HMRC 01/18)

| | | |
|----------------------|---------------|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT413_3 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT413_3 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT413_6 |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT413_6 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT413_5 |
| Box 6 | Lines 1 and 2 | Load Data > Assets/Liabs > Subsection IHT413_6 |
| | Lines 3 to 5 | Load Data > Assets/Liabs > Subsection IHT413_8 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT413_8 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT413_8 |
| Box 9 | | Load Data > Assets/Liabs > Subsection IHT413_11 |
| Box 10 | | Load Data > Assets/Liabs > Subsection IHT413_11 |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT413_11 |
| Box 12 | | Load Data > Assets/Liabs > Subsection IHT413_13 |
| Box 13 | Lines 1 to 5 | Load Data > Assets/Liabs > Subsection IHT413_13 |
| | Lines 6 to 8 | Load Data > Assets/Liabs > Subsection IHT413_14_1 |
| Box 14 | Lines 1 to 3 | Load Data > Assets/Liabs > Subsection IHT413_14_1 |
| | Lines 4 to 9 | Load Data > Assets/Liabs > Subsection IHT413_14_2 |
| Box 15 | Lines 1 to 6 | Load Data > Assets/Liabs > Subsection IHT413_15 |
| | Lines 7 to 9 | Load Data > Assets/Liabs > Subsection IHT413_17 |
| Box 16 | | Load Data > Assets/Liabs > Subsection IHT413_17 |
| Box 17 | | Load Data > Assets/Liabs > Subsection IHT413_17 |

| | | |
|--------|--------------|---|
| Box 18 | Details | Load Data > Assets/Liabs > Subsection IHT413_18 |
| Box 19 | Lines 1 to 5 | Load Data > Assets/Liabs > Subsection IHT413_19_1 |
| | Lines 6 to 9 | Load Data > Assets/Liabs > Subsection IHT413_19_2 |
| Box 20 | | Load Data > Assets/Liabs > Subsection IHT413_24 |
| Box 21 | | Load Data > Assets/Liabs > Subsection IHT413_24 |
| Box 22 | | Load Data > Assets/Liabs > Subsection IHT413_24 |
| Box 23 | | Load Data > Assets/Liabs > Subsection IHT413_24 |
| Box 24 | | Load Data > Assets/Liabs > Subsection IHT413_24 |
| Box 25 | | Load Data > Assets/Liabs > Subsection IHT413_25 |

IHT414 – Agricultural relief (version HMRC 09/14)

| | | |
|----------------------|----------------------------|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | Address | Load Data > Assets/Liabs > Subsection IHT414_1_1 |
| | Description, Lines 1 and 2 | Load Data > Assets/Liabs > Subsection IHT414_1_1 |
| | Description, Lines 3 to 6 | Load Data > Assets/Liabs > Subsection IHT414_1_2 |
| Box 2 | Lines 1 to 6 | Load Data > Assets/Liabs > Subsection IHT414_2_1 |
| | Lines 7 to 11 | Load Data > Assets/Liabs > Subsection IHT414_2_2 |
| Box 3 | No/Yes | Load Data > Assets/Liabs > Subsection IHT414_3_1 |
| | Details, Lines 1 to 6 | Load Data > Assets/Liabs > Subsection IHT414_3_1 |
| | Details, Lines 7 and 8 | Load Data > Assets/Liabs > Subsection IHT414_3_2 |
| Box 4 | No/Yes | Load Data > Assets/Liabs > Subsection IHT414_4_1 |
| | Details, Lines 1 to 6 | Load Data > Assets/Liabs > Subsection IHT414_4_1 |
| | Details, Lines 7 to 9 | Load Data > Assets/Liabs > Subsection IHT414_4_2 |
| Box 5 | Lines 1 to 6 | Load Data > Assets/Liabs > Subsection IHT414_5_1 |
| | Lines 7 to 12 | Load Data > Assets/Liabs > Subsection IHT414_5_2 |
| | Lines 13 to 15 | Load Data > Assets/Liabs > Subsection IHT414_6_1 |
| Box 6 | Lines 1 to 3 | Load Data > Assets/Liabs > Subsection IHT414_6_1 |
| | Lines 4 to 9 | Load Data > Assets/Liabs > Subsection IHT414_6_2 |

| | | |
|------------------------|----------------|---|
| | Lines 10 to 14 | Load Data > Assets/Liabs > Subsection IHT414_7 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT414_7 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT414_11 |
| Box 9 | | Load Data > Assets/Liabs > Subsection IHT414_11 |
| Box 10 | | Load Data > Assets/Liabs > Subsection IHT414_11 |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT414_11 |
| Box 12 | | Load Data > Assets/Liabs > Subsection IHT414_12 |
| Box 13 | No/Yes | Load Data > Assets/Liabs > Subsection IHT414_13 |
| | Dates | Load Data > Assets/Liabs > Subsection IHT414_13 |
| Box 14 | Yes/No | Load Data > Assets/Liabs > Subsection IHT414_14 |
| | Details | Load Data > Assets/Liabs > Subsection IHT414_14 |
| Box 15 | | Load Data > Assets/Liabs > Subsection IHT414_15 |
| Box 16 | | Load Data > Assets/Liabs > Subsection IHT414_16 |
| Box 17 | | Load Data > Assets/Liabs > Subsection IHT414_20 |
| Box 18 | | Load Data > Assets/Liabs > Subsection IHT414_20 |
| Box 19 | | Load Data > Assets/Liabs > Subsection IHT414_20 |
| Box 20 | | Load Data > Assets/Liabs > Subsection IHT414_20 |
| Additional information | | Load Data > Assets/Liabs > Subsection IHT414_20 |

IHT415 – Interest in another estate (version HMRC 01/18)

| | | |
|----------------------|---------------|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | Title | Load Data > Assets/Liabs > Subsection IHT415_3 |
| | Surname | Load Data > Assets/Liabs > Subsection IHT415_3 |
| | First names | Load Data > Assets/Liabs > Subsection IHT415_3 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT415_3 |
| Box 3 | Reference | Load Data > Assets/Liabs > Subsection IHT415_3 |
| | Date of grant | Load Data > Assets/Liabs > Subsection IHT415_3 |
| Box 4 | Lines 1 to 6 | Load Data > Assets/Liabs > Subsection IHT415_4_1 |

| | | |
|--------|---------------|--|
| | Lines 7 to 12 | Load Data > Assets/Liabs > Subsection IHT415_4_2 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT415_6_1 |
| Box 6 | Lines 1 to 6 | Load Data > Assets/Liabs > Subsection IHT415_6_1 |
| | Lines 7 to 9 | Load Data > Assets/Liabs > Subsection IHT415_6_2 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT415_7 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT415_7 |
| Box 9 | | Load Data > Assets/Liabs > Subsection IHT415_9 |
| Box 10 | | Load Data > Assets/Liabs > Subsection IHT415_9 |

IHT416 – Debts due to the estate (version HMRC 09/14)

| | | |
|----------------------|----------------|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT416_5_1 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT416_5_1 |
| Box 3 | Capital | Load Data > Assets/Liabs > Subsection IHT416_5_1 |
| | Interest | Load Data > Assets/Liabs > Subsection IHT416_5_1 |
| | Total | Automatically calculated |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT416_5_1 |
| Box 5 | Lines 1 to 5 | Load Data > Assets/Liabs > Subsection IHT416_5_1 |
| | Lines 6 to 11 | Load Data > Assets/Liabs > Subsection IHT416_5_2 |
| | Lines 12 to 17 | Load Data > Assets/Liabs > Subsection IHT416_5_3 |
| Box 6 | | Load Data > Assets/Liabs > Subsection IHT416_6 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT416_7 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT416_8 |
| Box 9 | | Load Data > Assets/Liabs > Subsection IHT416_9 |

IHT417 – Foreign assets (version HMRC 05/20)

| | | |
|------------------|--|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
|------------------|--|--|

| | | |
|----------------------|--|---|
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT417_1 Load Data > Investment > Subsection IHT417_1 (securities) |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT417_2 |
| Box 3 | | Automatically calculated |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT417_4 |
| Box 5 | | Automatically calculated |
| Box 6 | | Load Data > Assets/Liabs > Subsection IHT417_6 Load Data > Investment > Subsection IHT417_6 (securities) |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT417_7 |
| Box 8 | | Automatically calculated |
| Box 9 | | Load Data > Assets/Liabs > Subsection IHT417_9 |
| Box 10 | | Automatically calculated |

IHT418 – Assets held in trust (version HMRC 09/14)

| | | |
|----------------------|--|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT418_6 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT418_6 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT418_6 |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT418_6 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT418_6 |
| Box 6 | | Load Data > Assets/Liabs > Subsection IHT418_6 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT418_7 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT418_8 |
| Box 9 | | Load Data > Assets/Liabs > Subsection IHT418_9 |

| | | |
|-----------------------|--|---|
| Box 10 | | Automatically calculated |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT418_11 |
| Box 12 | | Automatically calculated |
| Box 13 | | Load Data > Assets/Liabs > Subsection IHT418_13 |
| Box 14 | | Load Data > Assets/Liabs > Subsection IHT418_14 |
| Box 15 | | Automatically calculated |
| Box 16 | | Load Data > Assets/Liabs > Subsection IHT418_16 |
| Box 17 | | Automatically calculated |
| Box 18 | | Automatically calculated, if the answer to Load Data > Assets/Liabs > Subsection IHT418_7 questions were 'No' |
| Box 19 | | Load Data > Assets/Liabs > Subsection IHT418_23_1 |
| Box 20 | | Load Data > Assets/Liabs > Subsection IHT418_23_1 |
| Box 21 | | Load Data > Assets/Liabs > Subsection IHT418_23_1 |
| Box 22 | | Load Data > Assets/Liabs > Subsection IHT418_23_1 |
| Box 23 | | Load Data > Assets/Liabs > Subsection IHT418_23_1 |
| Any other information | | Load Data > Assets/Liabs > Subsection IHT418_23_2 |

IHT419 – Debts owed by the deceased (version HMRC 01/18)

| | | |
|----------------------|---------|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | No/Yes | Load Data > Assets/Liabs > Subsection IHT419_1 |
| | Details | Load Data > Assets/Liabs > Subsection IHT419_1 |
| Box 2 | No/Yes | Load Data > Assets/Liabs > Subsection IHT419_2 |
| | Details | Load Data > Assets/Liabs > Subsection IHT419_2 |
| Box 3 | No/Yes | Load Data > Assets/Liabs > Subsection IHT419_3 |
| | Details | Load Data > Assets/Liabs > Subsection IHT419_3 |
| Box 4 | No/Yes | Load Data > Assets/Liabs > Subsection IHT419_4 |
| | Details | Load Data > Assets/Liabs > Subsection IHT419_4 |
| Box 5 | No/Yes | Load Data > Assets/Liabs > Subsection IHT419_5_1 |

| | | |
|-------|------------------|--|
| | Details of gifts | Load Data > Assets/Liabs > Subsection IHT419_5_1 |
| | Details of loans | Load Data > Assets/Liabs > Subsection IHT419_5_2 |
| Box 6 | | Load Data > Assets/Liabs > Subsection IHT419_6 |

IHT420 – National Heritage assets – Conditional exemption and offers in lieu of tax (version HMRC 09/14)

| | | |
|----------------------|---------|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT420_1 |
| Box 2 | No/Yes | Load Data > Assets/Liabs > Subsection IHT420_2 |
| | Details | Load Data > Assets/Liabs > Subsection IHT420_2 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT420_3 |
| Box 4 | No/Yes | Load Data > Assets/Liabs > Subsection IHT420_4 |
| | Details | Load Data > Assets/Liabs > Subsection IHT420_4 |

IHT421 – Probate summary (version HMRC 05/20)

| | | |
|---------------------------|------------------------|---|
| Name | | Estate Details – Edit > Administrative Details tab > Name of person or firm dealing with estate |
| Address | | Entity Details of person or firm dealing with estate > Address tab |
| Inheritance Tax reference | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Your reference | Reference | Client Details – Edit > Client Ref. |
| | Name | Estate Details – Edit > Administrative Details tab > Contact This list populates with those entered within Entity Details of firm or person dealing with estate > People tab |
| Your phone number | | Entity Details of person or firm dealing with estate > General tab > Telephone |
| Name | Title | Entity Details of deceased > General tab > Title |
| | Surname or family name | Entity Details of deceased > General tab > Surname |
| | First names | Entity Details of deceased > General tab > Forenames |

| | | |
|---------------------|--------------------------|---|
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| Address | Postcode | Estate Details – Edit > Deceased Details tab > Deceased Address |
| | House or building number | Estate Details – Edit > Deceased Details tab > Deceased Address |
| | Rest of address | Estate Details – Edit > Deceased Details tab > Deceased Address |
| Deceased's domicile | | Estate Details – Edit > Deceased Details tab > Domicile |
| Box 1 | | Automatically calculated |
| Box 2 | | IHT404 > Box 11 > Column A total |
| Box 3 | | Automatically calculated |
| Box 4 | | Automatically calculated |
| Box 5 | | Automatically calculated |
| Box 6 | | Manual entry required |
| Signature | | Manual signature required |
| Date | | Manual entry required |

IHT422 – Application for an Inheritance Tax reference (version HMRC 06/17)

| | | |
|-------|---------------------------|---|
| Box 1 | Name | Estate Details – Edit > Administrative Details tab > Name of person or firm dealing with estate |
| | Address | Entity Details of person or firm dealing with estate > Address tab |
| | Reference | Entity Details of person or firm dealing with estate > General tab > Your Ref. |
| | Phone number | Entity Details of person or firm dealing with estate > General tab > Telephone |
| | Capacity | Manual entry required |
| | Which form? | IHT400 or IHT100b tick box is automatically ticked, as the second tick box is not applicable |
| Box 2 | Name | Entity details of deceased > General tab > Ent. Name |
| | Any other name | Entity details of deceased > Individual tab > Also Known As |
| | Date of birth | Estate Details – Edit > Deceased Details tab > Date of Birth |
| | National insurance number | Estate Details – Edit > Deceased Details tab > NI Number |
| | Date of death | Estate Details – Edit > Deceased Details tab > Date of Death |
| | Country of probate | Estate Details – Edit > Deceased Details tab > Probate |

| | | |
|-------|--------------------|---|
| | | Application |
| Box 3 | Name | Not populated as not applicable to the IHT400 |
| | Date of settlement | Not populated as not applicable to the IHT400 |
| | Date of event | Not populated as not applicable to the IHT400 |
| | Type of event | Not populated as not applicable to the IHT400 |
| | Expected date | Not populated as not applicable to the IHT400 |

IHT423 – Direct Payment Scheme – Bank or building society account (version HMRC 01/20)

| | | |
|--------------------------|--------------------|---|
| Deceased's surname | | Entity Details of deceased > General tab > Surname |
| Deceased's first name(s) | | Entity Details of deceased > General tab > Forenames |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT423_1 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT423_1 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT423_1 |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT423_1 |
| Box 5 | Amount, in words | Load Data > Assets/Liabs > Subsection IHT423_1 |
| | Amount, in figures | Load Data > Assets/Liabs > Subsection IHT423_1 |
| Declaration | Surname 1 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of first Personal Representative > General tab > Surname |
| | First name(s) 1 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of first Personal Representative > General tab > Forenames |
| | Postcode 1 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of first Personal Representative > Address tab > Form Address |
| | Rest of address 1 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) |

| | | |
|--|-------------------|--|
| | | Entity Details of first Personal Representative > Address tab > Form Address |
| | Signature 1 | Manual signature required |
| | Date 1 | Manual entry required |
| | Surname 2 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of second Personal Representative > General tab > Surname |
| | First name(s) 2 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of second Personal Representative > General tab > Forenames |
| | Postcode 2 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of second Personal Representative > Address tab > Form Address |
| | Rest of address 2 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of second Personal Representative > Address tab > Form Address |
| | Signature 2 | Manual signature required |
| | Date 2 | Manual entry required |
| | Surname 3 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of third Personal Representative > General tab > Surname |
| | First name(s) 3 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of third Personal Representative > General tab > Forenames |
| | Postcode 3 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of third Personal Representative > Address tab > Form Address |
| | Rest of address 3 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of third Personal Representative > Address tab > Form Address |
| | Signature 3 | Manual signature required |
| | Date 3 | Manual entry required |

| | | |
|--|-------------------|--|
| | Surname 4 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of fourth Personal Representative > General tab > Surname |
| | First name(s) | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of fourth Personal Representative > General tab > Forenames |
| | Postcode 4 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of fourth Personal Representative > Address tab > Form Address |
| | Rest of address 4 | Estate Details – Edit > Administrative Details tab > Personal Representative(s) Entity Details of fourth Personal Representative > Address tab > Form Address |
| | Signature 4 | Manual signature required |
| | Date 4 | Manual entry required |

IHT430 – Reduced rate of Inheritance Tax (version HMRC 01/18)

| | | |
|----------------------|--|--|
| Name of deceased | | Entity Details of deceased > General tab > Ent. Name |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Question 1 | | Load Data > Assets/Liabs > Subsection IHT430_1 |
| Question 2 | | Load Data > Assets/Liabs > Subsection IHT430_1 |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT430_1 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT430_1 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT430_1 |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT430_1 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT430_1 |
| Box 6 | | Load Data > Assets/Liabs > Subsection IHT430_1 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT430_1 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT430_2 |

| | | |
|-------------|-------------------|--|
| Box 9 | | Load Data > Assets/Liabs > Subsection IHT430_2 |
| Box 10 | | Load Data > Assets/Liabs > Subsection IHT430_2 |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT430_2 |
| Box 12 | | Load Data > Assets/Liabs > Subsection IHT430_2 |
| Box 13 | | Load Data > Assets/Liabs > Subsection IHT430_2 |
| Box 14 | | Load Data > Assets/Liabs > Subsection IHT430_2 |
| Box 15 | | Load Data > Assets/Liabs > Subsection IHT430_3 |
| Box 16 | | Load Data > Assets/Liabs > Subsection IHT430_3 |
| Box 17 | | Load Data > Assets/Liabs > Subsection IHT430_3 |
| Box 18 | | Load Data > Assets/Liabs > Subsection IHT430_3 |
| Box 19 | | Load Data > Assets/Liabs > Subsection IHT430_3 |
| Box 20 | | Load Data > Assets/Liabs > Subsection IHT430_3 |
| Box 21 | | Automatically calculated |
| Box 22 | | Automatically calculated |
| Box 23 | | Automatically calculated |
| Box 24 | | Automatically calculated |
| Box 25 | Reduced rate | Load Data > Assets/Liabs > Subsection IHT430_4 |
| | Full rate | Load Data > Assets/Liabs > Subsection IHT430_4 |
| Box 26 | Reduced rate | Load Data > Assets/Liabs > Subsection IHT430_4 |
| | Full rate | Load Data > Assets/Liabs > Subsection IHT430_4 |
| Box 27 | Reduced rate | Automatically calculated |
| | Full rate | Automatically calculated |
| Box 28 | Reduced rate | Automatically calculated |
| | Full rate | Automatically calculated |
| Declaration | Name 1 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Component title 1 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Capacity 1 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Signature 1 | Manual signature required |
| | Date 1 | Manual entry required |
| | Name 2 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Component title 2 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Capacity 2 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Signature 2 | Manual signature required |

| | | |
|--|-------------------|--|
| | Date 2 | Manual entry required |
| | Name 3 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Component title 3 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Capacity 3 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Signature 3 | Manual signature required |
| | Date 3 | Manual entry required |
| | Name 4 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Component title 4 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Capacity 4 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Signature 4 | Manual signature required |
| | Date 4 | Manual entry required |
| | Name 5 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Component title 5 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Capacity 5 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Signature 5 | Manual signature required |
| | Date 5 | Manual entry required |
| | Name 6 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Component title 6 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Capacity 6 | Load Data > Assets/Liabs > Subsection IHT430_5 |
| | Signature 6 | Manual signature required |
| | Date 6 | Manual entry required |

IHT435 – Claim for residence nil rate band (RNRB) (version HMRC 03/21)

| | | |
|--------------------------|--|--|
| Deceased's surname | | Entity Details of deceased > General tab > Surname |
| Deceased's first name(s) | | Entity Details of deceased > General tab > Forenames |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT Reference number | | Estate Details – Edit > Deceased Details tab > IHT Reference |
| Box 1 | | Load Data > Assets/Liabs > Subsection IHT435_1 |

| | | |
|--------|--|---|
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT435_1 |
| Box 3 | | Automatically populated |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT435_1 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT435_1 |
| Box 6 | | Load Data > Assets/Liabs > Subsection IHT435_1 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT435_1 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT435_8 |
| Box 9 | | Load Data > Assets/Liabs > Subsection IHT435_9 |
| Box 10 | | Load Data > Assets/Liabs > Subsection IHT435_9 |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT435_9 |
| Box 12 | | Load Data > Assets/Liabs > Subsection IHT435_9 |
| Box 13 | | Load Data > Assets/Liabs > Subsection IHT435_9 |
| Box 14 | | Load Data > Assets/Liabs > Subsection IHT435_9 |
| Box 15 | | Load Data > Assets/Liabs > Subsection IHT435_9 |
| Box 16 | | Load Data > Assets/Liabs > Subsection IHT435_9 |
| Box 17 | | Load Data > Assets/Liabs > Subsection IHT435_9 |
| Box 18 | | Load Data > Assets/Liabs > Subsection IHT435_9 |
| Box 19 | | Load Data > Assets/Liabs > Subsection IHT435_19 |
| Box 20 | | Load Data > Assets/Liabs > Subsection IHT435_19 |
| Box 21 | | Load Data > Assets/Liabs > Subsection IHT435_19 |
| Box 22 | | Load Data > Assets/Liabs > Subsection IHT435_19 |
| Box 23 | | Load Data > Assets/Liabs > Subsection IHT435_19 |
| Box 24 | | Load Data > Assets/Liabs > Subsection IHT435_19 |
| Box 25 | | Load Data > Assets/Liabs > Subsection IHT435_19 |

IHT436 – Claim to transfer any unused residence nil rate band (version HMRC 04/21)

| | | |
|--------------------------|--|--|
| Deceased's surname | | Entity Details of deceased > General tab > Surname |
| Deceased's first name(s) | | Entity Details of deceased > General tab > Forenames |
| Date of death | | Entity Details of deceased > Individual tab > Date of Death |
| IHT | | Estate Details – Edit > Deceased Details tab > IHT Reference |

| Reference number | | |
|------------------|------------------------|---|
| Box 1 | Title | Load Data > Assets/Liabs > Subsection IHT436_1 |
| | Surname or family name | Load Data > Assets/Liabs > Subsection IHT436_1 |
| | First name(s) | Load Data > Assets/Liabs > Subsection IHT436_1 |
| Box 2 | | Load Data > Assets/Liabs > Subsection IHT436_1 |
| Box 3 | | Load Data > Assets/Liabs > Subsection IHT436_1 |
| Box 4 | | Load Data > Assets/Liabs > Subsection IHT436_1 |
| Box 5 | | Load Data > Assets/Liabs > Subsection IHT436_6 |
| Box 6 | | Load Data > Assets/Liabs > Subsection IHT436_6 |
| Box 7 | | Load Data > Assets/Liabs > Subsection IHT436_15 |
| Box 8 | | Load Data > Assets/Liabs > Subsection IHT436_15 |
| Box 9 | | Automatically calculated |
| Box 10 | | Automatically calculated |
| Box 11 | | Load Data > Assets/Liabs > Subsection IHT436_15 |
| Box 12 | | Automatically calculated |
| Box 13 | | Automatically calculated |
| Box 14 | | Load Data > Assets/Liabs > Subsection IHT436_15 |
| Box 15 | | Automatically calculated |
| Box 16 | | Load Data > Assets/Liabs > Subsection IHT436_22 |
| Box 17 | | Load Data > Assets/Liabs > Subsection IHT436_22 |
| Box 18 | | Automatically calculated |
| Box 19 | | Load Data > Assets/Liabs > Subsection IHT436_22 |
| Box 20 | | Automatically calculated |
| Box 21 | | Load Data > Assets/Liabs > Subsection IHT436_22 |
| Box 22 | | Automatically calculated |

These notes are confirmed to be applicable from Troika releases 2.09.015 onwards.