

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)

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

	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

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

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

		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

		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

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

	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

	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

	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

	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)

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)

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

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

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

IHT401 – Domicile outside the United Kingdom (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 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
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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
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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 09/21)

Name of deceased		Entity Details of deceased > General tab > Ent. Name
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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 01/22)

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 2.09.017 onwards.