



When to use this schedule

Fill in this schedule to tell us if the transfer was linked with a life assurance policy. Please read the guidance in the notes section before filling in this schedule. Complete a new D34 for each policy.

Name of transferor or settlor
<input type="text"/>
Date of transfer DD MM YYYY
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Inheritance Tax reference number, if known
<input type="text"/>

If you need help

For more information, go to www.gov.uk/inheritance-tax or you can phone the Inheritance Tax Helpline on 0300 123 1072.

If you're calling from outside the UK phone +44 300 123 1072.

1	Name of insurance company
	<input type="text"/>
2	Policy number
	<input type="text"/>
3	Value of policy at the date of transfer (as provided by the insurance company)
	<input type="text"/>
4	Value of all premiums paid on the policy
	<input type="text"/>

Enclose a copy of the policy schedule