



When to use this schedule

Fill in this schedule to tell us details of the household goods or other personal property included in this transfer

Please read the guidance in the notes section before filling in this schedule.

Name of transferor/settlor

Date of transfer or chargeable event DD MM YYYY

Inheritance Tax reference number if known

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 of the UK phone +44 300 123 1072.

Person Valuation office should contact

1 Name and address

Postcode

Reference

Phone number

2 Has a professional valuation been obtained?

No ☐ Yes ☐ If yes please provide a copy

3 Enter details for the property.

A Item No.	B Full address or description of property (including post code)	C Tenure (For example, freehold or leasehold. If leasehold tell us about the length of the lease and the ground rent, if applicable)	D Lettings/leases (please provide details)	E Value of agricultural, business or woodlands relief or heritage deducted	F Open market value at date of transfer
Totals carried forward				£	£

4 Were any of the properties subject to any damage that may affect their value?

No ☐ Yes ☐ If yes, fill in the box below using the same item numbers that you have used in column A above.

G Item No.	H Details of damage

5 Have any of the properties been sold, or is it intended that any of them should be sold within 12 months?

No ☐ Yes ☐ If yes, fill in table below using the same item numbers that you have used in column A above.

I Item No.	J Present position of sale	K Sale price	L Type of sale	M Prices for fixtures, carpets and curtains	N Use sale price as value?

6 Details of sales or other disposals of trees or underwood

O Item No.	P Date of sale	Q Gross amount realised	R Open market value at the date of disposal, if different	S If any sale or disposal was for less than full consideration explain the position