



LIFE AND REMAINDER INTERESTS REPORT REQUEST

This data form can be used to request a calculation report into the present value of life and remainder interests. These can be needed for family law, stamp duty, accounting, Centrelink and immediate settlement purposes.

Contact Details:

Contact Name			
Firm			
Address			
Post Code		State	
Telephone		Fax	
Email			
My client is	<input type="checkbox"/> The Life Tenant <input type="checkbox"/> One of the Remaindermen		

Details of the Interests:

Required Calculation Date			
Name of Life Tenant			
Date of Birth		Sex	<input type="checkbox"/> Male <input type="checkbox"/> Female
Name Remainderman 1			
Date of Birth		Sex	<input type="checkbox"/> Male <input type="checkbox"/> Female
Name Remainderman 2			
Date of Birth		Sex	<input type="checkbox"/> Male <input type="checkbox"/> Female
Name of Remainderman 3			
Date of Birth		Sex	<input type="checkbox"/> Male <input type="checkbox"/> Female
Is the remainder interest conditional on survival?	<input type="checkbox"/> Yes <input type="checkbox"/> No		



Assets Subject to the Interests:

Market Value of the property	
Gross weekly rent which could be obtained	
Expenses paid by tenant	

Any information that will establish the value of the property (which could include investments, bonds, real estate) and the rate of return that could be achieved, would be helpful.

If relevant, a copy of the Will setting up the testamentary trust may also be pertinent.

Comments:

Fees:

The fee for this report is \$330 including GST. An invoice will be forwarded with the report.

EMAIL DATAFORM TO: brian@netactuary.com.au