



## 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:

<b>Contact Name</b>			
<b>Firm</b>			
<b>Address</b>			
<b>Post Code</b>		<b>State</b>	
<b>Telephone</b>		<b>Fax</b>	
<b>Email</b>			
<b>My client is</b>	<input type="checkbox"/> The Life Tenant <span style="margin-left: 150px;"><input type="checkbox"/> One of the Remaindermen</span>		

Details of the Interests:

<b>Required Calculation Date</b>			
<b>Name of Life Tenant</b>			
<b>Date of Birth</b>		<b>Sex</b>	<input type="checkbox"/> Male <input type="checkbox"/> Female
<b>Name Remainderman 1</b>			
<b>Date of Birth</b>		<b>Sex</b>	<input type="checkbox"/> Male <input type="checkbox"/> Female
<b>Name Remainderman 2</b>			
<b>Date of Birth</b>		<b>Sex</b>	<input type="checkbox"/> Male <input type="checkbox"/> Female
<b>Name of Remainderman 3</b>			
<b>Date of Birth</b>		<b>Sex</b>	<input type="checkbox"/> Male <input type="checkbox"/> Female
<b>Is the remainder interest conditional on survival?</b>	<input type="checkbox"/> Yes <span style="margin-left: 150px;"><input type="checkbox"/> No</span>		



Assets Subject to the Interests:

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

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 \$440 including GST. An invoice will be forwarded with the report.

**FAX TO: (03) 6224 7119      EMAIL: [brian@netactuary.com.au](mailto:brian@netactuary.com.au)**