



EVA WEALTH

STRONGER TOGETHER

Inheritance Tax Calculator



INHERITANCE TAX CALCULATION



EVA WEALTH

STRONGER TOGETHER

This calculator will help you estimate how much inheritance tax could be due on your estate.

Your Assets	Approximate Value
1. Your main residence	
2. Your cash (Example: current account/ savings)	
3. Your investments (Example: shares, unit trusts or bonds)	
4. Other properties (Example: holiday home or rental property)	
5. Life insurance policies or pensions (Only lump sums not held in trust)	
6. Other belongings (Example: cars, antiques, jewellery)	
7. Anything else you can think of	
8. Your total estate value (Total of rows 1-7)	
9. Your total outstanding debts (Example: mortgage or loan)	
10. Net estate value (Row 8 minus row 9)	
11. Available nil rate band (NRB) (£325,000, or double this if you're a legally joined couple)	
12. Available residence nil rate band (RNRB) (£175,000, or double this if you're a legally joined couple)	
13. Your taxable estate (Row 10 minus rows 11 and 12)	
14. Your estimated inheritance tax bill (40% of the figure in row 13)	




EVA WEALTH

STRONGER TOGETHER

Here's an example of a married couple:

Your Assets	Approximate Value
1. Your main residence	£600,000
2. Your cash (Example: current account/ savings)	£150,000
3. Your investments (Example: shares, unit trusts or bonds)	£250,000
4. Other properties (Example: holiday home or rental property)	£150,000
5. Life insurance policies or pensions (Only lump sums not held in trust)	£200,000
6. Other belongings (Example: cars, antiques, jewellery)	£50,000
7. Anything else you can think of	£-
8. Your total estate value (Total of rows 1-7)	£1,400,000
9. Your total outstanding debts (Example: mortgage or loan)	£-
10. Net estate value (Row 8 minus row 9)	£1,400,000
11. Available nil rate band (NRB) (£325,000, or double this if you're a legally joined couple)	£650,000
12. Available residence nil rate band (RNRB) (£175,000, or double this if you're a legally joined couple)	£350,000
13. Your taxable estate (Row 10 minus rows 11 and 12)	£400,000
14. Your estimated inheritance tax bill (40% of the figure in row 13)	£160,000

A silhouette of a person with their right arm raised, set against a bright sunset or sunrise sky. The sun is low on the horizon, creating a lens flare effect. The person's hair is blowing in the wind.

If you'd like to discuss Inheritance Tax or would like to arrange an initial consultation to discuss how financial advice can help you, please get in touch.

01935 315611
hello@evawealth.co.uk

This guide is for general information only and does not constitute advice.

Eva Wealth is a trading style of Clarus Wealth. Clarus Wealth Ltd is an appointed representative of Best Practice IFA Group Ltd which is authorised and regulated by the Financial Conduct Authority. Clarus Wealth Ltd is entered on the Financial Services Register under reference 581586. The guidance and information contained within this website is subject to the UK regulatory regime, and is therefore targeted at consumers based in the UK.