

Life interest valuations

Life beneficiary

Name	
Sex	
Date of birth	

Assets subject to the life interest

In your cover letter please provide details of all assets subject to the life interest. Examples would be:

i. For a life interest in a property:

Market value of the property

Gross weekly rent which could be obtained

Expenses paid by the life tenant, such as: Annual council and water rates; Annual liability insurance premiums; Annual upkeep to maintain the property.

Please also provide documents such as Real Estate valuations, Rates notices in relation to the above.

ii. For a life interest in investments:

Market value of the investments

Details of the nature of each investment, such as shares, investment option etc.

Please also provide documents detailing these investments.

Contact

If you have any questions please contact us on 03 9642 2242.

Once you have all the required information, please forward it to us at:

Cumpston Sarjeant Pty Ltd, Level 13, 160 Queen Street Melbourne VIC 3000

Or by email: actuary@cumsar.com.au