

THE LATE JOE BLOGS

ESTATE ACCOUNTS



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THE LATE JOE BLOGS

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ESTATE SUMMARY

JOE BLOGS was born on 3 March 1940 in London

He died on 15 April 2022 in Manchester aged 82 years

Joe died a widow, leaving a son (JACK BLOGS) and a daughter (JOSEPHINE BLOGS)

Joe was domiciled in England & Wales for the purposes of UK Inheritance Tax (IHT)

By his will dated 22 September 2017 Joe appointed his children Jack and Josephine as executors.

Probate was granted on 27 July 2022 (copy attached). The Gross estate amounted to £592,372, and the net estate amounted to £307,354. No IHT fell due.

Subject to 2 cash legacies, the residue passes to Jack and Josephine equally.

The accounts show all payments made and received on behalf of the executors.

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PROBATE VALUES

ASSETS	£	£
House	555,000	
Car	4,500	
Bank 1	22,723	
Bank 2	6,777	
Shares	3,222	
Premium Bonds	150	
	<u>592,372</u>	<u>592,372</u>
 LIABILITIES		
Mortgage	276,581	
Car finance	3,453	
Funeral	3,750	
Wake	1,234	
	<u>285,018</u>	<u>285,018</u>
 NET ESTATE		<u>307,354</u>

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CASH ACCOUNT

MONEY IN	£	£
House (less mortgage and sales costs)	275,421.00	
Car (less finance)	1,047.00	
Bank 1	22,734.12	
Bank 2	6,779.79	
Shares	2,975.42	
Premium Bonds	150.00	
	<u> </u>	<u>309,107.33</u>
 MONEY OUT		
Funeral	3,750.00	
Wake	1,234.00	
	<u> </u>	<u>4,984.00</u>
 BALANCE FOR DISTRIBUTION		<u>304,123.33</u>

THE LATE JOE BLOGS
DISTRIBUTION ACCOUNT

BALANCE FOR DISTRIBUTION		<u>304,123.33</u>
Less Legacies		
RNLI	1,000.00	
Cancer Research	<u>1,000.00</u>	<u>2,000.00</u>
NET REMAINING SUM		<u>302,123.33</u>
Final residuary distributions		
Jack Blogs	151,061.67	
Josephine Blogs	<u>151,061.66</u>	<u>302,123.33</u>
BALANCE		<u>0</u>