

6 Enter the amount of interest charged on the loan, the rate(s) at which it was charged and the period over which it was charged

7 Enter details of capital repayments made on the loan

8 What evidence is there to support the existence of the loan?
You must provide copies of written evidence such as a letter or mortgage deed. A number of insurance linked products include a loan from the deceased to the trustees of a settlement or policy. If the loan is to be repaid by the trustees of such a scheme, provide a copy of the loan agreement and any settlement or policy document

9 If you wish to include a figure for the loan which is different from the total amount outstanding at box 3, please explain why here. Provide any evidence you have and show how you have worked out the figure