

IHT400 Workflow

If your firm uses Inheritance Tax forms and is not using workflow software, FormEvo can help you save time and improve risk management.

Specific workflow bundles, such as the **IHT400 Workflow**, are designed to save significant time and reduce the risk of errors across related form bundles.

All associated forms and schedules are **linked through automatic population**. This helps busy private client lawyers to complete these complex forms accurately and efficiently using automated calculations.

Key features and benefits

- Work on multiple forms and schedules simultaneously.
- Print all linked forms and schedules in a single batch.
- Set up templates for common matters to improve practice consistency.
- Add or remove relevant schedules for each matter, with brought-forward figures updating automatically to support a smooth process.
- Use a linked navigation panel to reduce the time spent locating forms and schedules for each matter.
- Automated calculations of asset values provide greater accuracy and time savings for users.
- Locked totals prevent accidental over-typing, with the option to unlock fields where required.

Estate in the UK continued

60	Copy the figure from box 58	£ 356,119.87
61	Copy the figure from box 59	£ 1,255,452.67
62	UK Government and municipal securities (Schedule IHT411, box 1), but include dividends and interest at box 64	£ 87,444.00
63	Listed stocks, shares and investments that did not give the deceased control of the company (Schedule IHT411, box 2)	£ 0.00
64	Dividends or interest on stocks, shares and securities	£ 7,030.00
65	Traded unlisted and unlisted shares except control holdings (Schedule IHT412, boxes 1 and 2)	£ 10,122.00 Copy from IHT412
66	Traded unlisted and unlisted shares except control holdings (go to IHT412 notes, 'Paying tax by instalments')	Copy from IHT412 £ 10,122.00
67	Control holdings of unlisted, traded unlisted and listed shares (Schedule IHT412, boxes 3, 4 and 5)	£ 0.00
68	Farms, farmhouses and farmland (give details on Schedules IHT414 and IHT405)	£ 0.00
69	Businesses including farm businesses, business assets and timber (give details on Schedule IHT413 and IHT405)	£ 0.00
70	Other land, buildings and rights over land (give details on Schedule IHT405)	Copy from IHT405 £ 0.00
71	Interest in another estate (Schedule IHT415, box 7)	£ 0.00
72	Interest in another estate (Schedule IHT415, box 9)	£ 0.00
73	Debts due to the estate (Schedule IHT416, box 3 total)	£ 0.00
74	Income Tax or Capital Gains Tax repayment	£
75	Trust income due to the deceased - go to IHT400, 'Notes'	£
76	Other assets including cryptoassets and income due to the deceased (enter details in the 'Additional information' boxes on page 19 of this form if not given elsewhere)	Copy from IHT418 - D6 £
77	Total of all the figures in column A (boxes 60 to 65 and 72 to 76)	£ 460,715.87
78	Total of all the figures in column B (boxes 61 to 71)	£ 1,265,574.67
79	Gross total of the estate in the UK (box 77 plus box 78)	£ 1,726,290.54

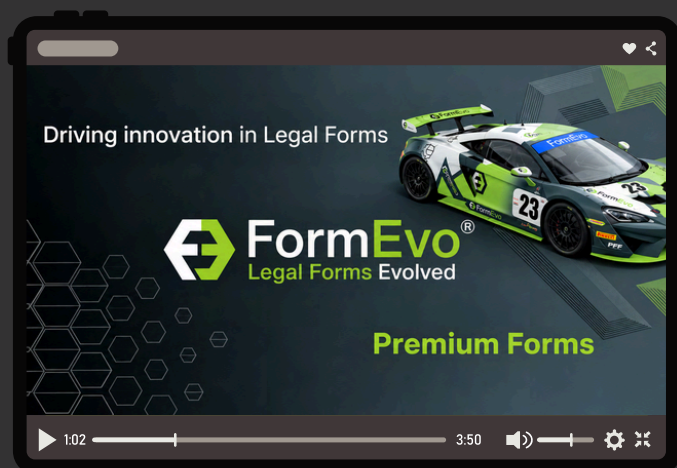
 Section Completed 

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Automatic population of supplemental forms following initial data entry, along with automated calculations, enables accurate and efficient form completion.

The **IHT400 Workflow** comprises all forms required for a **full HM Revenue and Customs Inheritance Tax account**, commonly referred to as the IHT400 forms. Forms and schedules can be selected individually and linked as a single file, simplifying the preparation of a full account.

The workflow also includes **IHTC Scottish forms** and can be fully integrated within the cloud forms catalogue, without requiring software installation.



Ross Walker,
Onboarding and
Training Manager
at FormEvo gives a
brief overview of
our Premium
Forms and
workflows.

[Watch](#)

Removing duplication with integrated workflows

FormEvo can integrate with your:

- Case Management Systems (CMS).
- Document Management Systems (DMS).
- Searches provider.

Data mapping is simpler than with traditional on-premise applications through the use of common field naming conventions.

Risk management at every stage

FormEvo workflows also support effective risk management at every stage of the process, for example when assessing benefactor capacity.

This allows firms to focus on clients and their circumstances, rather than just the paperwork.

Bundled forms allow data to be automatically populated across multiple documents, with embedded calculations that can reduce completion time by up to 80% compared to completing non-bundled forms.

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