

## 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](mailto:actuary@cumsar.com.au)