

First Settlor

This is for use by the Trustees in recording the loan repayments. Please keep this in a safe place with the Loan Trust.

Name of First Settlor

Loan Amount

£

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Date of Loan Trust

D	D	M	M	Y	Y	Y	Y
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LPRR 0918

Year	Amount of repayment	Balance of outstanding loan	Gifted to (name)*
Year 1	£	£	
Year 2	£	£	
Year 3	£	£	
Year 4	£	£	
Year 5	£	£	
Year 6	£	£	
Year 7	£	£	
Year 8	£	£	
Year 9	£	£	
Year 10	£	£	
Year 11	£	£	
Year 12	£	£	
Year 13	£	£	
Year 14	£	£	
Year 15	£	£	
Year 16	£	£	
Year 17	£	£	
Year 18	£	£	
Year 19	£	£	
Year 20	£	£	

* This column can be used to record lifetime gifts by the Settlor if the loan repayment is gifted to another person/trust. Prior to making lifetime gifts, the Settlor should take professional advice on the inheritance tax consequences of doing so.

Second Settlor		
This is for use by the Trustees in recording the loan repayments where there is a second Settlor. Please keep this in a safe place with the Loan Trust.		
Name of Second Settlor	<input type="text"/>	
Loan Amount	£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date of Loan Trust
		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Year	Amount of repayment	Balance of outstanding loan	Gifted to (name)*
Year 1	£	£	
Year 2	£	£	
Year 3	£	£	
Year 4	£	£	
Year 5	£	£	
Year 6	£	£	
Year 7	£	£	
Year 8	£	£	
Year 9	£	£	
Year 10	£	£	
Year 11	£	£	
Year 12	£	£	
Year 13	£	£	
Year 14	£	£	
Year 15	£	£	
Year 16	£	£	
Year 17	£	£	
Year 18	£	£	
Year 19	£	£	
Year 20	£	£	

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