

SAMPLE LETTER OF INSTRUCTION

Actuaries for Lawyers
PO Box 1509
Chippenham
SN15 5WJ

Dear Sirs

Valuation of a Reversion / Life Interest

We would like you to perform a valuation of a life interest in [an asset/ a trust]. We act on behalf of Mr X who is the [Life Tenant/ Remainderman]. Messrs [other firm] act on behalf of Mrs Y who is the [Life Tenant/ Remainderman].

The chronology of events leading to the [asset/trust] being set up is as follows:

.....

The assets relevant to this trust are as follows:

[list of assets, latest market value, date of latest valuation, information as to who carried out this valuation, copy of latest asset valuation report if available]

The interest of each of the parties in the assets of the trust is as described below:

.....

The party whose interest in the trust we wish you to value is []

A copy of the [trust deed / will] is enclosed.

You are to be instructed as a [party expert / single joint expert] in relation to this matter.

Your report needs be filed by [date].

Prior to carrying out any work on this case we would be grateful if you could confirm that preparation of such a report is within your area of expertise and that you can meet the above timescale for completion of the report. We also require confirmation of the fees that you would charge to prepare such a report in order that these can be approved by [ourselves / both instructing parties].

Yours sincerely

Firm of solicitors