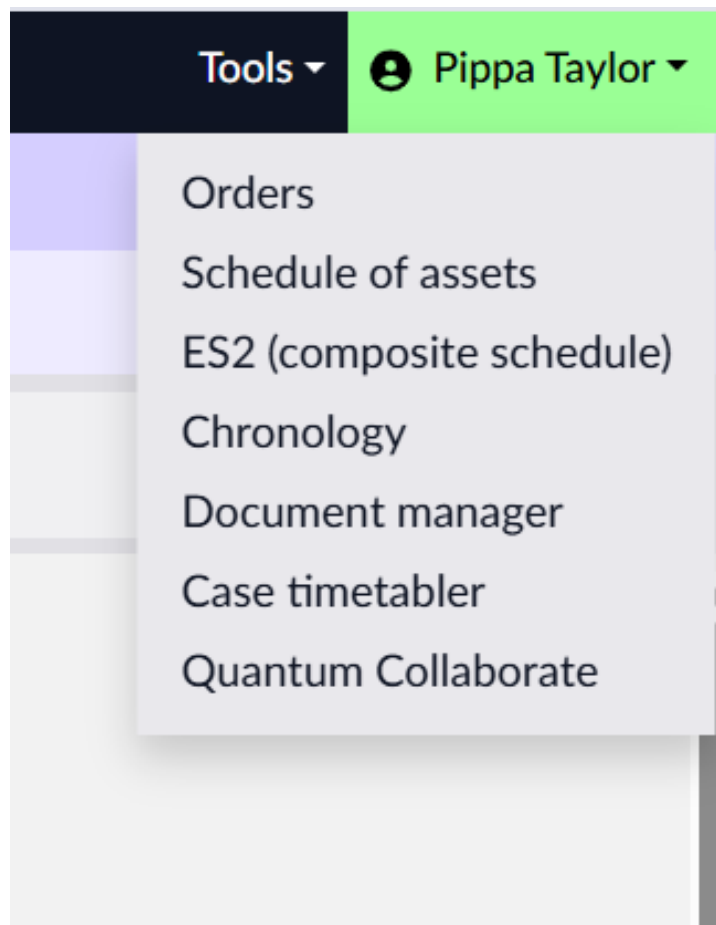


# ES2 Composite Asset and Income Schedule | Quantum Cloud

## Accessing the ES2

Once your client's Form E, E1, or E2 has been completed, you can import the data into the ES2 Composite Asset and Income Schedule, before then exporting it to Excel.

Go to the Tools section in the top right corner of Quantum and select ES2 (composite schedule):




## Entering Basic Information

In the first set of fields, enter the:

- hearing type
- date of hearing
- version number or name of the ES2 you are working on

ES2 Composite asset and income schedule Composite asset and income schedule Import Export

[Advisory notice on the correct use of ES2 \(July 2025\)](#)

Our client's sex 

Male

Hearing If other

Choose an option

Date of hearing

N/A

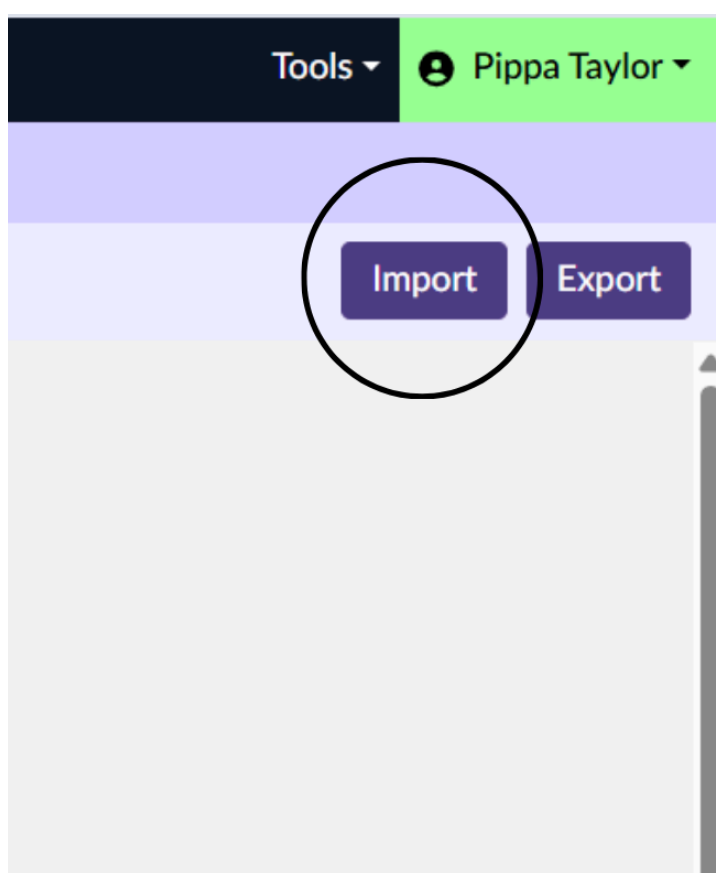
ES2 version

1

This data is asked for on the new ES2 template, and will be exported to Excel.

## Importing Data

Click Import to bring in all relevant data from Form E, E1 or E2.



This automatically populates the corresponding asset, liability and income sections in the ES2.

Either click 'Export' straightaway to export the data into Excel (see below) or click Add or Modify to work on the data further first.

Some examples of additions or changes you might want to make in Quantum (though you can equally do them in Excel) are:

1. Adding the other side's assets.
2. Updating the value of an asset or liability which has changed since the Form E, E1 or E2 data was entered.
3. Adding the Capital Gains Tax payable on an asset, so that line is automatically added to the spreadsheet when you export:

**Properties**

Property name  
123 Old School Building

Gross value  
GBP 500,000.00  
£500,000.00

Mortgage balance  
GBP 0.00  
£0.00

Early repayment penalties  
GBP 0.00  
£0.00

Costs of sale percentage  
3

Costs of sale total amount  
GBP 15,000.00  
£15,000.00

Capital Gains Tax  
GBP

Net equity excl. CGT £485,000.00      Net equity incl. CGT £485,000.00

Value of interest

OK

		HUSBAND		WIFE		JOINT		Agreed Clarifications (no argument / submissions)
		MR ALAN SMITH		MRS ANGELA JANE SMITH				
		H's case	W's case	H's case	W's case	H's case	W's case	
14	Euro = £ 0.8739							
15	Georgian Lari = £ 0.2742							
16	currency = £ 0.0000							
17	<b>PROPERTY (Legal Title)</b>							
18								
19	123 Old School Building    FAMILY HOME							
20	Gross Value					£500,000	£0	
21	Less Mortgage					£0	£0	
22	Less ERP					£0	£0	
23	Less Costs of Sale (3%)					(£15,000)	£0	
24	Less CGT					£0	£0	
25	Net equity					£485,000	£0	
26	Value of Interest					£485,000	£0	
27								
28						£485,000	£0	

## Exporting the ES2

Once the data is in place, click Export to generate a n Excel spreadsheet, which matches the official ES2 format exactly.

The file will be saved in your Downloads folder.

Name	Date modified	Type	Size
Today			
mr_alan_james_smith_es2_26_09_2025	26/09/2025 10:02	Microsoft Excel W...	96 KB

## Working on the ES2 in Excel

When working on the exported ES2 spreadsheet, you'll notice several changes have been made in the revised template:

### Formatting Changes

- Additional case data (type and date of hearing and ES2 version number) is now asked for.

- Parties are referred to as 'Husband' and 'Wife' (except in same-sex marriages), replacing 'Applicant' and 'Respondent'. The 'Husband' column always comes first, whether he is the Applicant or Respondent.
- The family home is always listed first in the property section.

### New 'Grand Totals' Box

- Positioned at the top right of the ES2, this box automatically calculates and displays overall totals as you complete the schedule.

### New Currency Converter Box

- Located in the top-left, this lilac shaded box shows the conversion rate for any currencies exported from Quantum.
- This rate is automatically applied to relevant items, and can be updated.

	A	B	C	D	E	F	G
1	<b>ANGELA SMITH v ALAN SMITH</b>				<b>GRAND TOTALS</b>		
2					Properties (net)		
3		<b>Case No:</b> 1234569			Bank accounts		
4		<b>Applicant:</b> Angela Smith			Investments/Policies		
5		<b>Respondent:</b> Alan Smith			Business interests		
6					Chattels		
7					Other		
8		<b>Hearing:</b> First Appointment			Liabilities		
9		<b>Date of hearing</b> DD/MM/YYYY			<b>TOTAL NON-PENSION</b>		
10							
11		<b>ES2 Version:</b>		1	Pensions		
12					<b>TOTAL INC. PENSION</b>		
13							
14	Euro = £ 0.8739 Georgian Lari = £ 0.2742 currency = £ 0.0000				<b>HUSBAND</b>		
15					<b>MR ALAN SMITH</b>		
16					<b>H's case</b>	<b>W's case</b>	
17	<b>PROPERTY (Legal Title)</b>						
18							

### Improved Formula Handling

- The new ES2 uses native Excel formulae, behaving exactly like a manually created spreadsheet, in line with the Notes on the Revised ES2 Template.
- Note that deleting a property from the spreadsheet will affect the formulae and you will therefore need to adjust the property sub-totals yourself manually. This only affects the properties section.

**If you have any questions or need support please email us at [info@classlegal.com](mailto:info@classlegal.com) or call us on 01652 652222. We are open from 9am-5.30pm, Monday to Friday.**