

Bereavement Instruction Form

This must be completed when you are notifying us of the death of a customer, and you wish to:

- close the deceased's account(s); or
- transfer the ownership of product into someone else's name.

Once completed, you can post it to your nearest branch or visit any of our branches together with originals or certified copies of the death certificate and proof of your identification (e.g., a valid passport or driving licence). You can also provide us with the funeral invoice if you would like us to pay these costs from the deceased's account(s).

Ownership for joint accounts will transfer to the surviving joint account holder(s).

Details of deceased customer

Title

Mr Mrs Ms Miss

Other

Date of birth (DD MM YYYY)

Date of death (DD MM YYYY)

First Name (s)

Surname

Address

Postcode:

Accounts held under deceased name

Account Number	Holding pattern

Customer representative details

First customer representative

Mr Mrs Ms Miss

Other _____

First Name

Surname

Second customer representative

Mr Mrs Ms Miss

Other _____

First Name

Surname

Date Of Birth

Date Of Birth

Address

Address

Nationality

Nationality

Telephone number

Telephone number

Email address

Email address

Representing as

NEXT OF KIN

EXUCUTOR

ADMINISTRATOR

Signatures: _____

Name: _____

Office Use Only: Account Balance:

Death certificate issuing authority:

UK International

English Translation Available

Yes Not applicable

Death Certificate Received

Yes No

Original Copy

Is the copy certified by Solicitor/Accountant or a banker, Name and Signatures available

Account Ownership:

Sole Joint

Is there a will

Yes (Take copy) No

Probate Required:

Yes No

Notes: