



Notification of Customer's Death

Please take the time to answer the questions below, this will help us to identify the Deceased's accounts.

Details of the person who has died

Name of the person who has died (the "Deceased")

Date of Birth / / Date of Death / /

Address

Note: Please provide either an original or a copy (certified by a Solicitor or Accountant) of the Death Certificate.

Please tell us any information you have about their account(s) with us. Include account numbers if you have them.

Tell us about yourself

First Name

Last Name

Relationship with the Deceased

Address

Telephone Number

NOTIFYING PERSON'S SIGNATURE

DATE
Day / Month / Year

Helpful information about what documents may be needed

It may help to get paperwork in order now, rather than later.

Before we can release money from accounts, we will need certain documents certified by a Solicitor or an Accountant.

Document	Tick here if enclosed ✓	We need this for			
		Funeral Expenses	Request for Information about the Deceased's accounts	Release of money without a Grant of Representation	Release of money with a Grant of Representation
Death Certificate	<input type="checkbox"/>	X	X	X	X
Will (if there is one)	<input type="checkbox"/>		X	X	
Grant of Representation (a document that the Probate Office gives to the person dealing with the estate)	<input type="checkbox"/>				X
Proof of Identification	<input type="checkbox"/>	X	X	X	X
Funeral Receipts / Invoices	<input type="checkbox"/>	X			



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