

SECTION 1: ACCOUNTS HOLDER'S DETAILS

Title	<input type="text"/>		
Forename(s)	<input type="text"/>		
Surname	<input type="text"/>		
Date of Birth	<input type="text"/>	Date of death	<input type="text"/>

SECTION 2: DETAILS OF ACCOUNTS HELD

Account Number(s)	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

SECTION 3: DETAILS OF SOLICITOR (IF ACTING ON BEHALF OF THE ESTATE)

Name of Solicitor	<input type="text"/>
Firm Name & Address	<input type="text"/>
Postcode	<input type="text"/>
Telephone Number	<input type="text"/>

SECTION 4: DETAILS OF PERSONAL REPRESENTATIVES ACTING ON BEHALF OF THE ESTATE

The Personal Representatives are those entitled to receive the funds on behalf of the estate i.e. next of kin, executors or administrators. Please provide full details for all the Personal Representatives named on this form.

We will correspond with the first named Personal Representative unless you request otherwise. Prior to closure of the account we will confirm the payment details to all named parties.

Scottish Building Society is required to verify the identity of all Personal Representatives. More information about the documentation we may require can be found at www.scottishbs.co.uk under Proving Your Identity in the Help and Support section.

	Personal Representative 1	Personal Representative 2
Title	<input type="text"/>	<input type="text"/>
Full Name	<input type="text"/>	<input type="text"/>
Home Address	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Telephone Number	<input type="text"/>	<input type="text"/>

SECTION 4: DETAILS OF PERSONAL REPRESENTATIVES ACTING ON BEHALF OF THE ESTATE (CONTINUED)

	Personal Representative 3	Personal Representative 4
Title	<input type="text"/>	<input type="text"/>
Full Name	<input type="text"/>	<input type="text"/>
Home Address	<input type="text"/>	<input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Telephone Number	<input type="text"/>	<input type="text"/>

SECTION 5: CERTIFICATE OF CONFIRMATION OR GRANT OF PROBATE

Do you have or are you intending to apply for a Certificate of Confirmation or Grant of Probate? **Please tick one option below:**

- Yes Please enclose certified copy of the original if you have received it.
- No In order to receive payment of funds, a Certificate of Confirmation or Grant of Probate is usually required. If you do not intend to apply for Certificate of Confirmation, in the case of a small estate, let us know as we may be able to assist.

Total value of estate

Checklist

- Bereavement Form fully completed
- Death Certificate (or Certified Copy) enclosed
- Passbook(s)/Passcard(s)/Certificate(s) or Lost Passbook/Passcard/Certificate Form enclosed*
- Proof of Identification for all Personal Representatives enclosed
- Confirmation or Grant of Probate enclosed (if applicable)
- Copy of Will enclosed (if you wish funds to be released without Confirmation or Grant of Probate)

*The Lost Passbook/Passcard/Certificate Form can be downloaded at www.scottishbs.co.uk

PLEASE NOTE:

For balances exceeding £36,000, Confirmation or Grant of Probate is mandatory in every instance. For balances ranging from £250 - £36,000, a completed statutory declaration form is required if there is a Will. If there is no Will, the statutory declaration must be witnessed by a Notary Public.

Executor/Solicitor signature(s) Date

If you have any questions, you can call us on 0333 207 4007. Our lines are open 9am-5pm Monday to Friday (10am-5pm Wednesday).