

## Important Information about completing this form

You will need to complete different sections of this form depending on the total balance(s) of the late customer's account(s). Please complete the correct sections so that your request can be processed correctly.

**Total balance on the account(s) does not exceed £30,000 (and Grant of Probate or equivalent has NOT been applied for or obtained):**

Complete sections 1,2,3 and 4.

**Total balance of the account(s) is over £30,000 (or any balance where Probate or equivalent has been applied for or obtained):**

Complete sections 1,2,3 and 5. *Note: All Executors named on the Grant of Probate or equivalent are required to complete and sign section 5.*

**Joint Accounts only**

Please complete sections 1 and 2.

For branch use only

BRANCH NO	
CASHIER NO	
CASHIER NAME	
SCAN CODE	

## Section 1 – Details of the late customer

We understand that you may not have all of this information, please complete what you can.

Name

Please provide us with an original or certified copy of the death certificate in order for us to register the death.

We've got some questions to ask about the mortgaged property, please complete what you can:

1. Will the property be occupied? **Yes/No**
2. If yes, who will be living in the property?
3. Do you know how the mortgage balance will be repaid?

Please ensure you notify the household insurance provider and let us know if anything changes in relation to the property.

Account Number(s)							Sole/ Joint

Mortgage Account Number

## Section 2 – Details of the personal representative or executor registering the death

In the event a solicitor is not acting on your behalf, the personal representative/executor detailed below will be solely contacted in regards to winding up the late customers estate.

Name		Relationship to Deceased	
Date of Birth	Contact Number	Email Address	
Address			Postcode

Do you require balances to be forwarded to you at the above address (please delete as appropriate)? **Yes/No**  
(Balances cannot be forwarded until we've received an original or certified copy of the death certificate.)

We will use our electronic verification system to verify a personal representative or executor. In certain circumstances this may not be successful (for example if you have recently moved house and you are not yet listed on the electoral roll). We may need to ask you for additional identification.

Please mark **X** in **ONE** box only to advise us which of the following you will be applying for:

Grant of Probate	
Letters of Administration	
Certificate of Confirmation (Scotland)	
None of the above	

*\*Please note: Regardless of the balance(s) in the account(s), if you have or are in the process of applying for one of the above documents, we'll need to see the original document or a certified copy.*

## Additional Permitted Subscription (APS)

An APS allows a one-off ISA Allowance to be passed to an existing customer when their spouse/civil partner has passed away. For further information please contact us or visit our website.

To complete an APS transfer, please complete an APS form and submit it along with this completed form.

## Section 3 – Closure Details

Is there an ISA to be transferred by Additional Permitted Subscription (APS)? Yes/No

If no, please provide us with account details for the closing balance below.

If yes, please ensure an Additional Permitted Subscription form INV492 is completed and attached to this form.

**If this is the only account held, please proceed to section 4 or 5 accordingly.**

**If there are more accounts to close, please provide us with account details for the closing balance below.**

*(To be completed once all documents have been provided to us)*

Bank/Building Society Name													
Account Holder Name													
Sort Code			-				-				Account Number		
Payment Reference													

**Please complete section 4 or 5 accordingly in order for the account(s) to be closed.**

## Section 4 – Declaration and signature for account(s) closures where balance(s) total less than £30,000

**Bereavement Declaration – Please sign below if Grant of Probate (or equivalent) is not being obtained**

I, the named Personal Representative, confirm and agree:

- No Grant of Probate, Letters of Administration or Confirmation (Scotland) have been granted to the late customer's estate.
- I am legally entitled to administer the late customer's estate and if there is anyone else entitled to administer the estate, I have their consent to close the account(s).
- To indemnify the Cumberland Building Society against any proceedings, costs, claims and demands which may be made against them by reason of them acting in accordance with my instructions.

Name	Date of Birth												
Address													Postcode
Signature of Personal Representative													Date

## Section 5 – Declaration and signature for account closures where the balance(s) total over £30,000 or where Grant of Probate or equivalent has been obtained

In order for the society to close any of the accounts, we must see an original or certified copy of the Grant of Probate, Letters of Administration or Certificate of Confirmation (Scotland) document.

All executors/administrators named on the Grant of Probate or equivalent must sign below to close the accounts. By signing you agree to all funds being sent to the details in section 3.

Name	Date of Birth	
Address	Postcode	
Signature of Personal Representative	Date	

Name	Date of Birth	
Address	Postcode	
Signature of Personal Representative	Date	

Name	Date of Birth	
Address	Postcode	
Signature of Personal Representative	Date	