

FORMS

Bereavement: Request to close account(s)

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Late customer's name	
Full name	

Information needed
 All Personal Representative(s) must complete this form. One form of named identification and one form of address identification is required for all Personal Representative(s). Please read our "Death and Bereavement" guide for more information on the identification we accept.

We recommend that you take legal advice before signing this form.

Completing this form

There are three pages to this form, please ensure you complete all sections appropriate to you and return all pages to us.

- Section 1 – Balances of £5,000 or less – To be completed by all Personal Representatives
- Section 2 & 3 – Balances of £5,001 to £14,999 – To be completed by all Personal Representatives and witnessed by a Solicitor
- Section 4 – Balances of £15,000 and above, or where a Grant of Probate is required. All Personal Representatives will also need to sign the declaration
- Section 5 – Account details – To be completed by the Personal Representative(s) irrespective of balance amount.

Declarations of Personal Representative(s)

1. Declaration and Signature for closures under £5,000* where a Grant of Probate has not been obtained. If Grant of Probate has been obtained go to Section 4.

I/We the named Personal Representative(s), confirm and agree:

- a. No Grant of Probate or Letters of Administration have been granted to the late customer's estate
- b. I/We have provided Principality with an original or certified copy of the deceased death certificate
- c. I/We are legally entitled to administer the late customer's estate
- d. I/We will be responsible for any losses, expenses or other costs reasonably incurred by Principality by reason of it acting in accordance with my/our instructions

(*excluding the cost of the funeral, application fee for probate, Inheritance Tax and solicitor's witness fee)

Signature of all Personal Representative(s)	
Signature	
Full name	
Date	

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2. Declaration and Signature for closures between £5,001 and £14,999* where a Grant of Probate has not been obtained. If Grant of Probate has been obtained go to Section 4.

I/We the named Personal Representative(s) do solemnly and sincerely declare that:

- a. No Grant of Probate or Letter of Administration has been granted to the late customer's estate
- b. I/We have provided Principality with an original or certified copy of the deceased death certificate
- c. I/We are legally entitled to administer the late customer's estate
- d. I/We will be responsible for any losses, expenses or other costs reasonably incurred by Principality by reason of it acting in accordance with my/our instructions

(*excluding the cost of the funeral, application fee for probate, Inheritance Tax and solicitor's witness fee)

Signatures of Personal Representative(s)	
Signature	Signature
Full name	Full name
Date	Date

If you have completed section 2 please make sure a Solicitor completes section 3 (below).

3. To be completed by a Solicitor if you have completed Section 2.	
Declared at address	
Witnessed by (Name of Solicitors)	
Signature	
Date	
Official stamp	

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4. Signature for closures of £15,000 and above* or where a Grant of Probate has been obtained for any amount.
Please ensure that all Personal Representative(s) named on the Grant of Probate sign this form.

Full name(s) of Personal Representative	Full name(s) of Personal Representative
Signature	Signature
Date	Date

5. Accounts to be closed

Please mark X in the appropriate box below. Please note we are unable to transfer to another bank or building society.

Cheque closure(s)

Account Number	Cheque payable to
Account Number	Cheque payable to
Account Number	Cheque payable to
Account Number	Cheque payable to
Account Number	Cheque payable to

The closure balance transferred to Principality Account

(*excluding the cost of the funeral, application fee for probate, Inheritance Tax and solicitor's witness fee)

Internal use only

ID taken for all signatories	
Staff Name	
Branch number	

Your data will be held in accordance with the Data Protection Act of 1998 and used only for the purpose of this application.



Principality Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, reference number 155998. Principality Building Society, Principality Buildings, Queen Street, Cardiff, CF10 1UA. principality.co.uk