

Bereavement withdrawal request

1. Details of the late customer

Full name	
Account number(s)	

2. Personal Representative(s) details

Personal Representative 1

Title	Full name
House Number/Name	Street name
Town	Postcode
Home telephone	
Mobile telephone	
Work telephone	

Personal Representative 2

Title	Full name
House Number/Name	Street name
Town	Postcode
Home telephone	
Mobile telephone	
Work telephone	

Please turn over to complete Section 3 and 4

3. Payment Details

<input type="checkbox"/> HM Revenue & Customs (For the purpose of paying Inheritance Tax)	Amount	£	IHT Reference	F
<input type="checkbox"/> HM Court Service (For the purpose of paying probate application fees)	Amount	£		
<input type="checkbox"/> Funeral Director If the cheque is for funeral expenses, please attach a copy of the original invoice.	Amount	£		
<input type="checkbox"/> Solicitor's fees For the purpose of witnessing "Bereavement - Request to Close Account(s)"	Amount	£		

4. Indemnity and Signature - This section must be signed by the Personal Representative(s)

We recommend that you take legal advice before you sign this form

As the Personal Representative of the above named deceased, I agree:

- I am legally entitled to administer the late customer's estate. Where there are other person(s) entitled to administer the estate I confirm that I have their consent to make this Declaration and withdraw from the account(s)
- to be responsible for any losses, expenses or other costs reasonably incurred by Principality as a result of payment being made in accordance with this request without/prior to a grant of probate for the deceased's estate, and
- if Grant of Probate is being applied for, to produce the Grant of Probate to the Society as soon as practicable after it has been received.

Signature(s) of Personal Representative(s)

Signature	Signature
Full name	Full name
Date	Date