

YOUR
SOCIETY

Bereavement Request to close account(s)

Bereavement Request to close account(s)

(Page 1 of 3)

Late customer's name	
Full name	
Account number(s)	
Information needed All Personal Representative(s) must complete this form. One form of name 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.	
<ul style="list-style-type: none">• Section 1 – Balances of £14,999 or less and where Grant of Probate has not been obtained – to be completed by all Personal Representatives.• Section 2 & 3 – Balances of £15,000 to £24,999 where a Grant of Probate has not been obtained – to be completed by all Personal Representatives and witnessed by a Solicitor.• Section 4 – Balances of £25,000 and above, or where a Grant of Probate has been obtained. 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.	
Declaration of Personal Representative(s)	
1. Declaration and Signature for closure of account balances of £14,999 or less* where a Grant of Probate has not been obtained. If a Grant of Probate has been obtained go to Section 4.	
I/We the named Personal Representative(s), confirm and agree:	
<p>a. No Grant of Probate or Letters of Administration have been granted to the late customer's estate</p> <p>b. I/We have provided Principality with an original or certified copy of the deceased death certificate</p> <p>c. I/We are legally entitled to administer the late customer's estate</p> <p>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</p> <p>(*excluding the cost of the funeral, application fee for probate, Inheritance Tax and solicitor's witness fee)</p>	
Full name	Full name
Signature	Signature
Date	Date

Bereavement Request to close account(s)

(Page 2 of 3)

2. Declaration and Signature for closure of account balances between £15,000 and £24,999* where a Grant of Probate has not been obtained. If a 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)

Personal Representative 1		Personal Representative 2	
Full name		Full name	
Signature		Signature	
Date		Date	

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

3. To be completed by a Solicitor if you have completed Section 2.

Declared at address		Official stamp
Witnessed by (Name of solicitor and the name of their firm/company)		
Signature		
Date		

4. Signature for closure of account balances of £25,000 or 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.

Personal Representative 1		Personal Representative 2	
Full name		Full name	
Signature		Signature	
Date		Date	

(*excluding the cost of the funeral, application for probate, inheritance tax and solicitor's certification fees)

Bereavement Request to close account(s)

(Page 3 of 3)

5. Accounts to be closed			
Cheque closure(s)			
Amount		Cheque payable to	
Amount		Cheque payable to	
Closure balance transferred to Principality Account			
Amount		Principality Account number	
Amount		Principality Account number	
Closure by Faster Payment			
Amount		Reference	
Sort code		Account number	
Payable to			
Amount		Reference	
Sort code		Account number	
Payable to			

Your data will be held in accordance with the Data Protection Act 2018 supplementing the General Data Protection Regulation (EU) 2016/679 (GDPR) and used only for the purposes of this application.