YOUR SOCIETY

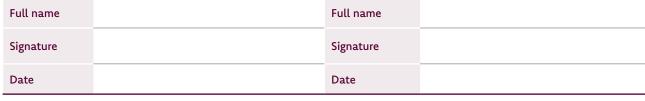
### Bereavement Request to close account(s)



# Bereavement Request to close account(s)

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Late customer's n	name
Full name	
Account number(s)	
form of name ide	estedd esentative(s) must complete this form. If you are not a Principality customer, you'll need to provide one ntification and one form of address identification. Please read our Death and Bereavement guide for non the identification we accept.
If you are unsure	whether to sign this form, please seek legal advice.
<ul> <li>Section 1 – Ban Personal Reprint Section 2 &amp; 3 by all Persona</li> <li>Section 4 – Ban All Personal Reprint Section 5 – Ban All Personal Reprint Section 6 – Ban All Personal Reprint Secti</li></ul>	ages to this form, please ensure you complete all sections appropriate to you and return all pages to us. alances of £19,999 or less and where Grant of Probate has not been obtained – to be completed by all
Declaration of Pe	rsonal Representative(s)
• the account of	d signature - Complete this section if: closure has a balance of £19,999 or less* where a Grant of Probate has not been obtained. te has been obtained go to Section 4.
<ul><li>a. No Grant of Prob. I/We have prov</li><li>c. I/We are legally</li><li>d. I/We will be reacting in accord</li></ul>	Personal Representative(s), confirm and agree: obate or Letters of Administration have been granted to the late customer's estate wided Principality with a copy of the deceased death certificate y entitled to administer the late customer's estate sponsible for any losses, expenses or other costs reasonably incurred by Principality by reason of it dance with my/our instructions ost of the funeral, application fee for probate, Inheritance Tax and solicitor's witness fee)





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## Bereavement Request to close account(s)

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- 2. Declaration and signature Complete this section if:
  - the account closure has a balance between £20,000 and £39,999\* 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 a 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.

- 3. Declaration and signature Complete this section if:
- Section 2 is completed, this section will need to be completed by a Solicitor.

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

- 4. Declaration and signature Complete this section if:
  - the account closure has a balance of £40,000 or above\*. You must provide a Grant of Probate or Letters of Administration.
  - 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	Personal Repre	sentative 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)



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# Bereavement Request to close account(s)

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5. Closure details				
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.



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