

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. If you are not a Principality customer, you'll need to provide one form of name identification and one form of address identification. Please read our Death and Bereavement guide for more information on the identification we accept.

If you are unsure whether to sign this form, please seek legal advice.

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 £19,999 or less and where Grant of Probate has not been obtained – to be completed by all Personal Representatives.
- Section 2 & 3 – Balances of £20,000 to £39,999 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 £40,000 and above, or where a Grant of Probate has been obtained for any amount. All Personal Representatives will also need to sign the declaration.
- Section 5 – Account closure – to be completed by the Personal Representative(s) irrespective of balance amount.

Declaration of Personal Representative(s)

1. Declaration and signature – Complete this section if:

- the account closure has a balance of £19,999 or less* 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:

- No Grant of Probate or Letters of Administration have been granted to the late customer's estate
- I/We have provided Principality with a copy of the deceased death certificate
- I/We are legally entitled to administer the late customer's estate
- 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)

Full name		Full name	
Signature		Signature	
Date		Date	

Bereavement Request to close account(s)

(Page 2 of 3)

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:

- No Grant of Probate or Letter of Administration has been granted to the late customer's estate
- I/We have provided Principality with a copy of the deceased death certificate
- I/We are legally entitled to administer the late customer's estate
- 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 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)



Where home matters
principality.co.uk

Bereavement Request to close account(s)

(Page 3 of 3)

5. Closure details			
Cheque closure(s)			
Amount		Cheque payable to	
Amount		Cheque payable to	
Closure balance transferred to Princtality Account			
Amount		Princtality Account number	
Amount		Princtality 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.