

Death of Investor - Personal Representative Registration Form



Important Information

To complete this form please write inside the boxes in BLOCK CAPITALS using black ink. Please note that we require ID in the form of a passport or driving license. If you need any help please contact your local branch or call us on 0345 734 4345.

1. Details of the deceased investor (PLEASE COMPLETE IN ALL CASES)

Title Mr Mrs Miss Other

Please enter ALL forenames

Surname

Please specify the account number of any Newcastle Building Society account held by the late customer.

Account number

2. Personal Representative / Solicitor Details

Title Mr Mrs Miss Other

Please enter ALL forenames

Surname

Name of Solicitor (if applicable)

Address

Property Number and/or Property name

Street

Town Postcode

Contact telephone number Ext:

3. Information Required

Please mark **X** in **ONE** box only to advise us of the account(s) for which you require balance(s) as at the date of death

None Required Sole account(s) only Joint and Sole account(s)

Please mark **X** in **ONE** box only to advise us which of the following you will be applying for

Grant of Probate Letters of Administration Confirmation (Scotland) None of these

Please mark **X** in the box(es) below to advise us if you require release of funds from the late customer's account(s) to pay for any of the following:

Inheritance Tax Probate Fees Funeral Expenses

If you are NOT applying for either a Grant of Probate, Letters of Administration or Confirmation (Scotland) and you would like to close the late customer's account, Please mark **X** in this box

Please note if the balance(s) of the deceased's account exceeds £30,000, we will require a Grant of Probate, Letters of Administration or Confirmation (Scotland) in order to close the account(s).

3. Signature

Signature of Personal Representative

PLEASE SIGN WITHIN THIS BOX

Date

PLEASE PRINT NAME