

Bereavement – Request to close account(s)



- This form will be scanned electronically; please write inside the boxes in BLOCK CAPITALS using black ink as this will help us to process your request correctly
- Please DO NOT cross out any sections that you do not need to complete

Important information detailing the sections you will need to complete

You will need to complete different sections of this form depending on the total balance(s) of the late customer's account(s). Please complete the correct sections so we can process your request correctly.

Total balance of the account(s) is under £1,000

Complete sections 1 and 2, and the Personal Representative is required to complete and sign Section 4

Total balance of the account(s) is between £1,000-£5,000

Complete sections 1, 2 and 3. The Beneficiary is required to complete and sign Section 5 and a Commissioner for Oaths/Solicitor must complete and sign Section 7

Total balance of the account(s) is between £5,000-£15,000

Complete sections 1 and 2. The Personal Representative is also required to complete and sign Section 6 and a Commissioner for Oaths/Solicitor must complete and sign Section 7

Total balance of the account(s) is over £15,000

Complete sections 1 and 2. The Executor or Administrator is required to complete and sign Section 8 (In Scotland all Executors must sign Section 8)

If you are applying for or have already gained a Grant of Probate/Letters of Confirmation we must see a copy of the documents regardless of the estate value before we can close any of the account(s).

Case reference (if known)

1. Details of the late customer - Please complete in all cases

Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other	<input type="text"/>
Please enter ALL forenames	<input type="text"/>					
Surname	<input type="text"/>					
Residential address	<input type="text"/>					
Property number	<input type="text"/>	and/or Property name	<input type="text"/>			
Street	<input type="text"/>					
Town	<input type="text"/>				Postcode	<input type="text"/>
Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of death	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Please specify the account number, including sort code (if there is one), of any Nationwide account held by the late customer.						
Sort code (if there is one)	<input type="text"/>		Account number	<input type="text"/>		

2. Personal Representative details - Please complete in all cases

Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other	<input type="text"/>
Please enter ALL forenames	<input type="text"/>					
Surname	<input type="text"/>					
Permanent residential address	<input type="text"/>					
Property number	<input type="text"/>	and/or Property name	<input type="text"/>			
Street	<input type="text"/>					
Town	<input type="text"/>				Postcode	<input type="text"/>
Contact telephone numbers:	<input type="text"/>		Office/Mobile	<input type="text"/>		
Home	<input type="text"/>					

3. Beneficiary's details - To be completed if the balance of the account(s) is between £1,000 - £5,000

Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other	<input type="text"/>
Please enter ALL forenames	<input type="text"/>					
Surname	<input type="text"/>					
Permanent residential address	<input type="text"/>					
Property number	<input type="text"/>	and/or Property name	<input type="text"/>			
Street	<input type="text"/>					
Town	<input type="text"/>				Postcode	<input type="text"/>

Statutory Declarations of Personal Representative & Beneficiary

4. Declaration and Signature for closures under £1,000

I, the named Personal Representative, confirm & agree:

- No Grant of Probate, Letters of Administration or Confirmation (Scotland) have been granted to the late customer's estate
- I am legally entitled to administer the late customer's estate and, if there is anyone else entitled to administer the estate, I have their consent to close the account(s)
- To indemnify Nationwide against any claims, proceedings, damages or expenses by reason of it acting in accordance with my instructions

Please mark **X** in the appropriate box below.

The closure monies should be transferred to the following Nationwide account. Please note we are unable to transfer to any other bank or building society.

Sort code (if there is one)

Account number

OR

The closure cheque should be made payable to

Signature of Personal Representative

PLEASE SIGN WITHIN THIS BOX

Date (please write **INSIDE** the boxes)

D	D	M	M	Y	Y	Y	Y
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5. Declaration and Signature for closures between £1,000 and £5,000

I, the named beneficiary, do solemnly and sincerely declare that:

- No Grant of Probate/Letters of Administration or Confirmation (Scotland) has been granted to the late customer's estate
- I am entitled, either solely or with others, under the will or under the Administration of Estates Act 1925 or the Succession Act (Scotland) 1964 (as amended) to the balance(s) in the late customer's account(s) with Nationwide
- Where there are other beneficiaries entitled to a share in these funds, I confirm I have their consent to make this declaration and to close the account(s)

Please mark **X** in the appropriate box below.

The closure monies should be transferred to the following Nationwide account. Please note we are unable to transfer to any other bank or building society.

Sort code (if there is one)

Account number

OR

The closure cheque should be made payable to

- I make this solemn declaration conscientiously believing the same to be true and by virtue of the provisions of the Statutory Declarations Act 1835

Signature of Beneficiary

PLEASE SIGN WITHIN THIS BOX

Date (please write **INSIDE** the boxes)

D	D	M	M	Y	Y	Y	Y
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If you have completed section 5 please make sure a Commissioner for Oaths/Solicitor completes section 7.

6. Declaration and Signature for closures between £5,000 and £15,000

I, the named Personal Representative, do solemnly and sincerely declare that:

- No Grant of Probate/Letters of Administration or Confirmation (Scotland) has been granted to the late customer's estate
- 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 close the account(s)

Please mark **X** in the appropriate box below.

The closure monies should be transferred to the following Nationwide account. Please note we are unable to transfer to any other bank or building society.

Sort code (if there is one)

Account number

OR

The closure cheque should be made payable to

- I make this solemn declaration conscientiously believing the same to be true and by virtue of the provisions of the Statutory Declarations Act 1835

Signature of Personal Representative

PLEASE SIGN WITHIN THIS BOX

Date (please write **INSIDE** the boxes)

D	D	M	M	Y	Y	Y	Y
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If you have completed section 6 please make sure a Commissioner for Oaths/Solicitor completes section 7.

7. To be completed by a Commissioner for Oaths/Solicitor if you have completed sections 5 or 6

Declared at
Property number and/or Property name

Town Postcode

before me
(Name of Commissioner for
Oaths/Solicitors)

Signature

Signature of Commissioner for Oaths/Solicitor
PLEASE SIGN WITHIN THIS BOX

Date (please write INSIDE the boxes)

Official Stamp

8. Signature for closures over £15,000

In order for Nationwide to close any of the accounts where Grant of Probate, Letters of Confirmation or Letters of Administration have been granted we must see an original copy of the documents together with this completed form.

Please mark X in the appropriate box below.

The closure monies should be transferred to the following Nationwide account. Please note we are unable to transfer to any other bank or building society.

Sort code (if there is one) Account number

OR

The closure cheque should be made payable to

Signature(s) of Executor or Administrator

1 Signature of Executor or Administrator
PLEASE SIGN WITHIN THIS BOX

2 Signature of second Executor or Administrator
(Scotland only)
PLEASE SIGN WITHIN THIS BOX

3 Signature of third Executor or Administrator
(Scotland only)
PLEASE SIGN WITHIN THIS BOX

4 Signature of fourth Executor or Administrator
(Scotland only)
PLEASE SIGN WITHIN THIS BOX

Date (please write INSIDE the boxes)

Scotland – all Executors must sign