

This form will be scanned electronically; please help us to deal with your request correctly by writing inside the boxes in BLOCK CAPITALS and using black ink

Important information about what you will need to complete

Sections of this form may not be relevant to you, depending on the total balances held by the Society on behalf of the late customer. To help us process your request correctly please ensure that you complete the sections relevant to you.

The total balance held is £5,000.00 or less and probate has not been obtained;

Complete sections 1, the Personal Representative/ Executor is required to complete and sign section 2 and section 3 is to be completed by a Solicitor/ Commissioner for Oaths.

The total balance held exceeds £5,000.00 or probate has been obtained for any amount;

Complete sections 1, and the Personal Representative(s)/ Executor(s) are required to complete and sign section 4.

1. Details of the late customer

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/> Other	
Forename(s)						
Surname						
Residential Address						
Property Number	and/or Property name					
Street						
Town						
Postcode						
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 detail the account(s) held by the late customer.

Roll Number 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Roll Number 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Roll Number 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Roll Number 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Signature(s) of Executor or Administrator

1. Signature of Executor or Administrator
PLEASE SIGN WITHIN THIS BOX

PLEASE PRINT NAME

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

PLEASE PRINT NAME

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

PLEASE PRINT NAME

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

PLEASE PRINT NAME

DATE Please write INSIDE the box

Scotland only – All Executors must sign

Do you require Tax Certificates for the account(s)? Yes No

Branch use only

Date received

Date sent to MST

Staff initial

Member Services use only

Date received

Date sent to MST

Staff initial

Guidance for completing this form

Section	Details	✓
Section 1	This section will capture to details of the late customer, please state all known accounts of the customer.	
Section 2	This section is the indemnity required to close total balances under £5,000.00. Please clearly state how you wish to receive the funds.	
Section 3	This section must be signed and officially stamped by a Solicitor/ Commissioner for Oaths after they have checked the contents of the form. This form must be completed in all cases where the total balance does not exceed £5,000.00, unless Grant of Probate/ Letters of Administration have been applied for or obtained.	
Section 4	This section must be completed when Grant of Probate or Letters of Administration have been sought regardless of the balance held with Harpenden Building Society. If Letters of Confirmation have been applied for (Scotland) all Executors signatures will be required in order to close the account. Please ensure that you indicate clearly how you wish to receive the funds.	

Key

- **Executor** – A person or persons who have been named in a Will or Grant of Probate document and will be responsible for dealing with the affairs of a deceased person.
- **Personal Representative** – A person or persons who are representing the interests and affairs of the deceased.
- **Grant of Probate/ Letters of Administration/ Letters of Confirmation** – These are documents which will contain an official government seal which legally confirm that the person/persons named on the document are handling the interests and affairs of the deceased. In Scotland Letters of Administration will be referred to as Letters of Confirmation.

If you require any assistance completing this form, please contact Member Services on 01582 765411 or email them at memberservices@harpendenbs.co.uk.

Once this form is completed please forward it to Member Services using the enclosed prepaid envelope or using our freepost address;

Harpenden Building Society
FREEPOST
SB165
14 Station Road
Harpenden
Hertfordshire
AL5 4BR

Head Office: Mardall House, 9-11 Vaughan Road, Harpenden, Hertfordshire AL5 4HU
www.harpendenbs.co.uk

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.
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