

Roll Number 4

Bereavement

Request for funeral/inheritance tax/probate fees

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

Please ensure that you Funeral costs; Complete section 1 and Inheritance Tax costs; Complete section 1 and Probate fees; Complete section 1 and	d the Persona : d the Persona	l Represe l Represe	ntative(s)/ ntative(s)/	'Executor 'Executor	(s) are requ	ired to compl	ete and sign s	ection 3.	
1. Details of the la	te custome	er						•	
Title	Mr	Mrs	Miss	Ms	Other				
Forename(s)									
Surname									
Residential Address									
Property Number	and,	or Prope	rty name						
Street									
Town									
Postcode									
Date of birth					Date of o	death			
Please detail the account	t(s) held by th	e late cu	stomer.						
Roll Number 1									
Roll Number 2									
Roll Number 3									

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I, am the named Executor/ Personal Representative and I confirm & agree;

- I am legally entitled to administer the estate of the late customer, and in the instance that there are other Executors/ Personal Representatives entitled to administer the estate, I have their consent to request funds from the account(s) for funeral costs,
- To indemnify Harpenden Building Society against any loss, claim, damages or expenses which may arise as a consequence of them acting on my instruction.

The cost to be paid for the funeral is £					
Please mark $m{x}$ in the appropriate box below to detail how you wish for the funeral to be paid,					
The funeral costs should be paid by cheque,					
Made payable to;					
OR .					
The funds should be transferred by Faster Payment to the below account;					
Bank					
Sort Code					
Account Number					
Ref/Roll Number					
We will require sight of the original funeral invoice together with this form prior to any payment being made.					
I do solemnly and sincerely declare that I am the Personal Representative/ Executor and am entitled to request this payment from the late customers account(s).					
Signature of Personal Representative/ Executor PLEASE SIGN WITHIN THIS BOX					
PLEASE PRINT NAME					
DATE Please write INSIDE the box					

3. Inheritance Tax costs

I, am the named Executor/ Personal Representative and I confirm & agree;

- I am legally entitled to administer the estate of the late customer, and in the instance that there are other Executors/ Personal Representatives entitled to administer the estate, I have their consent to request funds from the account(s) for inheritance tax costs,
- To indemnify Harpenden Building Society against any loss, claim, damages or expenses which may arise as a consequence of them acting on my instruction.

The cost to be paid for inheritance tax is £
Please mark \boldsymbol{x} in the appropriate box below to detail how you wish for the inheritance tax to be paid,
The inheritance tax should be paid by cheque,
Made payable to;
OR .
The funds should be transferred by Faster Payment (if the total is of £100,000.00 or below) or CHAPs (if the total exceeds £100,000.00) to the below account.
Bank
Sort Code
Account Number
Ref/Roll Number
For CHAPS only, I authorise £15.00 to be deducted from the total balance in order to process this payment.
We will require sight of the original inheritance tax IHT423 form, along with this form, prior to any payment being made.
I do solemnly and sincerely declare that I am the Personal Representative/ Executor and am entitled to request this payment from the late customers account(s).
Signature of Personal Representative/ Executor PLEASE SIGN WITHIN THIS BOX
PLEASE PRINT NAME
DATE Please write INSIDE the box

4. Probate fees

Date received

Actioned by

I, am the named Executor/ Personal Representative and I confirm & agree;

- I am legally entitled to administer the estate of the late customer, and in the instance that there are other Executors/ Personal Representatives entitled to administer the estate, I have their consent to request funds from the account(s) for probate fees,
- To indemnify Harpenden Building Society against any loss, claim, damages or expenses which may arise as a consequence of them acting on my instruction.

The cost to be paid for the probate fees is £ Please mark x in the appropriate box below to detail how you wish for the probate fees to be paid, Probate should be paid for by cheque, Made payable to;
OR
The funds should be transferred by Faster Payment to the below account.
Bank
Sort Code
Account Number
Ref/Roll Number
We will require sight of the original invoice for probate prior to any payment being made.
I do solemnly and sincerely declare that I am the Personal Representative/ Executor and am entitled to request this payment from the late customers account(s).
Signature of Personal Representative/ Executor PLEASE SIGN WITHIN THIS BOX
PLEASE PRINT NAME
DATE Please write INSIDE the box
Branch use only
Date received Date sent to MST Staff initial
Member Services use only

Documentation attached

Checked by

Date actioned

Signature verified

Date checked

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 in order to pay any funeral expenses. Please clearly state how you wish for the payment to be made.	
Section 3	This section is the indemnity required in order to pay any inheritance tax. Please clearly state how you wish for the payment to be made.	
Section 4	This section is the indemnity required in order to pay for any probate fees. Please clearly state how you wish for the payment to be made.	

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



Contact us by post · phone · online · in branch harpendenbs.co.uk

Harpenden

Aberdeen House 14 Station Road, Harpenden Hertfordshire AL5 4SE Tel: 01582 344204

Radlett

341 Watling Street Radlett Hertfordshire WD7 7LB Tel: 01923 854457

Tring

38 High Street Tring Hertfordshire HP23 5AA Tel: 01442 824722

Leighton Buzzard

22 Market Square Leighton Buzzard Bedfordshire LU7 1HE Tel: 01525 852525

Wendover

3 Icknield Court, Back Street Wendover Buckinghamshire HP22 6EB Tel: 01296 623595

Buckingham

23 Market Hill Buckingham Buckinghamshire MK18 1JX Tel: 01280 823666

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