

# Bereavement Form



Section 1. Details of deceased member			
Title			
Surname			
First name(s)			
Date of birth		Date of death	
Section 2. Details of accounts held			
Account number(s)			
Section 3. Details of solicitor (if acting on behalf of the estate)			
Name of solicitor			
Firm name & address			
Postcode			
Telephone number			
Section 4. Details of Personal Representatives acting on behalf of the estate			
<ul style="list-style-type: none"><li>The Personal Representatives are those entitled to receive the funds on behalf of the estate i.e. next of kin, executors or administrators. Please provide full details for all the Personal Representatives named on this form.</li><li>We will correspond with the first named Personal Representative unless you request otherwise. Prior to closure of the account we will confirm the payment details to all named parties.</li></ul> <p>Scottish Building Society is required to verify the identity of all Personal Representatives. More information about the documentation we may require can be found at <a href="http://www.scottishbs.co.uk">www.scottishbs.co.uk</a> under Proving Your Identity in the Help and Support section.</p>			
	Personal Representative 1	Personal Representative 2	
Title			
Full Name			
Home address			
Postcode			
Contact telephone number			

**Section 5. Certificate of Confirmation of Grant of Probate**

Do you have or are you intending to apply for a Certificate of Confirmation or Grant of Probate? *Please tick one option below:*

<input type="checkbox"/> Yes	Please enclose certified copy of the original if you have received it.
<input type="checkbox"/> No	In order to receive payment of funds, a Certificate of Confirmation or Grant of Probate is usually required. If you do not intend to apply for Certificate of Confirmation, in the case of a small estate, let us know as we may be able to assist.
Total value of estate (£)	

**Checklist:**

- Bereavement Form fully completed
- Death Certificate (or Certified Copy) enclosed
- Passbook(s) or Lost Passbook Notification(s) enclosed\*
- Proof of Identification for all Personal Representatives enclosed
- Confirmation or Grant of Probate enclosed (if applicable)
- Copy of Will enclosed (if you wish funds to be released without Confirmation or Grant of Probate)

**If you have any queries about completing this form, or require any further information, please call us on 0345 600 0585**