

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 Mrs Miss Ms Other

Please enter ALL forenames

Surname

Residential address

Property number

and/or Property name

Street

Town

Postcode

Date of birth

Date of death

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)

Account number

2. Personal Representative details - Please complete in all cases

Title

Mr Mrs Miss Ms Other

Please enter ALL forenames

Surname

Permanent residential address

Property number

and/or Property name

Street

Town

Postcode

Contact telephone numbers:

Home

Office/Mobile

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

Title

Mr Mrs Miss Ms Other

Please enter ALL forenames

Surname

Permanent residential address

Property number

and/or Property name

Street

Town

Postcode

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