

Personal Representative’s request for funds to cover costs



- If you need us to release money from the deceased’s account(s) to pay HM Revenue & Customs for inheritance tax, please complete the IHT423 form and post it to us. You can find this by visiting gov.uk and searching for ‘Direct Payment Schemes for Inheritance Tax (IHT423)’
- 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 faster
- You will need to complete a separate form for each cheque that you require
- If you will require release of funds from the deceased’s account(s) to pay for funeral expenses, please provide us with an invoice and we can arrange this for you.

How Nationwide uses your information

Nationwide may make searches about you at credit reference agencies who will supply us with information, including information from the Electoral Register, for the purpose of verifying your identity. The agencies will record details of the search. The searches will not be seen or used by lenders to assess your ability to obtain credit. This information may also be used for the prevention of money laundering. Alternatively, we may ask you to provide physical forms of identification. You can find out more about how Nationwide uses your information at nationwide.co.uk/privacy

Deceased investor’s details

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Please enter ALL forenames

Surname

Account number (including sort code if there is one)

Sort code

Account number

Case Reference (If known)
This starts with MATS or QL

Personal Representative’s details

Title (please mark X in the box that applies to you or state your title)

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Please enter ALL forenames

Surname

Permanent residential address

Property number

and/or Property name

Street

Town

Postcode

Home telephone number

Extension (if applicable)

Mobile telephone number

Email

Date of birth

Nationality

Country of residence

Payment details

Amount

£

Payee

Please mark X in one box only to indicate to whom the cheque should be made payable

HM Court Service ☐ Funeral expenses ☐
(for the purpose of paying probate application fees)

NB We cannot send a payment directly to HM Court Service

In exceptional circumstances, you may be able to give us instructions to make an electronic payment instead. There are more details about this in our Bereavement Support leaflet. Please review the ‘Payment information’ section and call us on 0800 464 3018 if you want to discuss this with us.

Solicitors details

If you require the cheque to be sent to your solicitor, please enter the solicitor's details below

Solicitor's name

Company address

Property number

and/or Property name

Street

Town

Postcode

Indemnity and Signature - This section MUST be signed by the Personal Representative

I, the named Personal Representative, confirm and agree:

- I am/We are the authorised Personal Representative of the deceased customer.
- I am/We are authorised to act on behalf of the deceased customer and legally entitled to administer their estate either under the deceased customer's Will, the intestacy rules or a Grant of Probate.
- Where I am a joint personal representative, I confirm that I have the consent of all other Personal Representatives to give instructions to Nationwide in relation to the deceased customer's Nationwide accounts.
- I am/We are incurring reasonable expenses as a result of properly carrying out my/our duties to administer the estate of the deceased and ask that I/we are reimbursed from the Nationwide account of the deceased.

Personal Indemnity - the legal commitment you're making:

- I/We agree to indemnify Nationwide against any claims, proceedings, damages or expenses by reason of acting on my instructions.
- I/We agree to reimburse Nationwide for any losses or costs incurred as a result of another person being entitled to a share of any money paid or transferred.

Signature of Personal Representative

PLEASE SIGN WITHIN THIS BOX BY HAND

Date (please write INSIDE the boxes)

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