

Checklist and guide to the enclosed Bereavement Request to close accounts form

These notes will help you with the administration of the accounts. For further assistance, please contact our helpdesk on 0800 464 3018 where our advisors will be pleased to help you.

Reference		✓
Section 1	This section will contain the details of the deceased customer, please note that only one account number needs to be provided in the specified box – if a bond is held by the deceased please specify the bond account number otherwise this will remain open until maturity. If there is more than one bond please state the account numbers you wish to close.	
Section 2	This section will contain the details of the person(s) acting as the Personal Representative/Executor.	
Section 3	This section is for the indemnity to close total balances valuing under £15,000; a method of closure must be clearly specified and this section must be signed by the Personal Representative/Executor.	
Section 4	This section is for the indemnity to close total balances valuing between £15,000 and £50,000; a method of closure must be specified and this section must be signed by the personal representative/Executor. If completed section 5 must be completed.	
Section 5	This section must be signed and officially stamped by a Solicitor/Commissioner for Oaths after they have checked the contents of the form. This section must be completed in any case where the total balance is above £15,000 unless Grant of Probate Letters of Confirmation/Administration have been applied for or obtained.	
Section 6	This section must be completed if an application for Grant of Probate or Letters of Confirmation/ Administration has been submitted regardless of the balance or if the Executor is already in possession of these documents. If Letters of Confirmation have been applied for we will require the signatures of all the executors in order to close the account(s) and release the funds.	

Glossary

- **Personal Representative** – a person or persons who are representing the interests and affairs of the deceased.
- **Executor/Executrix** – A person or persons who have been officially named in a will or on a Grant of Probate document as those handling the affairs of the deceased.
- **Grant of Probate/Letters of Confirmation** – A document issued with a government seal legally confirming that the person/persons named on the document are irrefutably handling the affairs of the deceased.
- **The estate** – This embodies the monetary and physical assets of the deceased. The estate can include money held within bank accounts and also properties owned by the deceased.
- **Beneficiary** – The person, persons or organisation whom the funds will be released to upon finalisation of the estate.

Bereavement – Request to close account(s)

Before you complete this form, please see how Nationwide uses your information by visiting nationwide.co.uk/privacy

- 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.

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) (must be signed by the Executor(s) named on the Probate document).

Total balance of the account(s) is under £15,000

Complete sections 1 and 2, and the Personal Representative is required to complete and sign Section 3.

Total balance of the account(s) is between £15,000 - £50,000

Complete sections 1 and 2. The Personal Representative is also required to complete and sign Section 4 and a Commissioner for Oaths/Solicitor must complete and sign Section 5. This is a legal requirement.

Total balance of the account(s) is over £50,000

Complete sections 1 and 2. The Executor or Administrator is required to complete and sign Section 6 (In Scotland all Executors must sign Section 6).

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 DD MM YYYY Date of death DD MM YYYY

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

ALL accounts will be closed.

N.B. Bond accounts will remain open until maturity unless stated in the Bond notes section on page 3

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

We'll sometimes use these phone numbers to get in touch with you about your application.

