

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 complete the sections relevant to you.

Funeral costs;

Complete section 1 and the Personal Representative(s)/ Executor(s) are required to complete and sign section 2.

Inheritance Tax costs;

Complete section 1 and the Personal Representative(s)/ Executor(s) are required to complete and sign section 3.

Probate fees;

Complete section 1 and the Personal Representative(s)/ Executor(s) are required to complete and sign section 4.

1. Details of the late customer								
Title	Mr	Mrs	Miss	Ms	Other			
Forename(s)								
Surname								
Residential Address								
Property Number	and/or P	roperty nar	ne					
Street								
Town								
Postcode								
Date of birth					Date of death			
Please detail the account(s) held by the late customer.								
Roll Number 1								
Roll Number 2								
Roll Number 3								
Roll Number 4								

2. Funeral 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 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 \checkmark 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						
Account Name						
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 \checkmark 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						
Account Name						
Sort Code						
Account Number						
Ref/Roll Number						
For CHAPS only, I authorise £11.00 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

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 ✔ in the appropriate box be	elow to detail how you wish for the prob	pate fees to be paid,
Probate should be paid for by che	eque,	
Made payable to;		
OR		
The funds should be transferred b	y Faster Payment to the below account.	
Bank		
Account Name		
Sort Code		
Account Number		
Ref/Roll Number		
We will require sight of the original invoi	ce for probate prior to any payment be	ing made.
I do solemnly and sincerely declare tha this payment from the late customers a	t I am the Personal Representative/ Exe ccount(s).	cutor and am entitled to request
Signature of Personal Representative / Executor		
PLEASE SIGN WITHIN THIS BOX		
PLEASE PRINT NAME		
DATE Please write INSIDE the box		
Date received	Date sent to MST	Staff initial
Member Services use only		
Date received	Documentation attached	Signature verified
Actioned by Date act	tioned	

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 our Savings Team on 01582 765411 or email them at memberservices@harpendenbs.co.uk.

Once this form is completed please forward it to our Savings Team 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

Radlett

341 Watling Street Radlett

Hertfordshire WD7 7LB

Tring

38 High Street

Hertfordshire HP23 5AA

Leighton Buzzard

22 Market Square Leighton Buzzard Bedfordshire LU7 1HE

Head Office: Mardall House, 9-11 Vaughan Road, Harpenden, Hertfordshire AL5 4HU Tel: 01582 765411 Email: enquiries@harpendenbs.co.uk



Supporting our local communities to create a better future

Harpenden Building Society is authorised for investments by Trustees and is a member of the Building Societies Association. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority. Firm reference number: 157260.