

# BEREAVEMENT

## Request to close account(s)

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

Sections of this form may not be relevant to you, depending on the total balances held by the Society on behalf of the late customer. To help us process your request correctly please ensure that you complete the sections relevant to you.

**The total balance held is £5,000.00 or less and Grant of Probate has not been obtained.**

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

**The total balance held is between £5,000.01 and £30,000.00 and Grant of Probate has not been obtained.**

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

**The total balance held is over £30,000.01 or Probate has been obtained for any amount.**

Complete **sections 1 and 2**. The Executor is required to complete and sign **section 6**.

### Section 1: Details of the late customer - Please complete in all cases

Title	Mr	Mrs	Miss	Ms	Other									
Forename(s)														
Surname														
<b>Residential Address</b>														
Property Number	and/or Property name													
Street														
Town														
Postcode														
Date of birth							Date of death							
Please detail an account held by the late customer. ALL accounts will be closed														
Roll Number 1					-						-			

### Section 2: Personal Representative details - Please complete in all cases

Title	Mr	Mrs	Miss	Ms	Other								
Forename(s)													
Surname													
<b>Residential Address</b>													
Property Number	and/or Property name												
Street													
Town													
Postcode													
Date of birth							Date of death						







## Documentation

Please tick if you require tax certificates for the accounts

## Internal use only

Date received	Date sent to MST	Staff initial
Date processed	Staff initial	

### Guidance for completing this form

Section	Details	✓
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.	
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 of up to £5,000.00; 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 between £5,000.01 and £30,000.00; a method of closure must be specified and this section must be signed by the Personal Representative/Executor. If completed section 5 must also 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 between £5,000.01 and £30,000.00 unless Grant of Probate or 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 Administration has been obtained regardless of the balance. 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.	

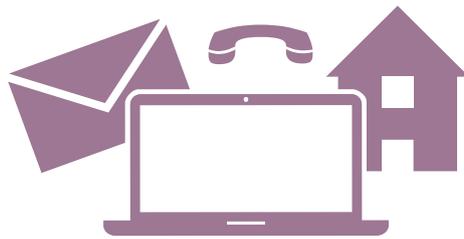
### Key

- **Executor** – A person or persons who have been named in a Will or Grant of Probate document and will be responsible for dealing with the affairs of a deceased person.
- **Personal Representative** – A person or persons who are representing the interests and affairs of the deceased.
- **Grant of Probate/Letters of Administration/ Letters of Confirmation** – These are documents which will contain an official government seal which legally confirm that the person/persons named on the document are handling the interests and affairs of the deceased. In Scotland Letters of Administration will be referred to as Letters of Confirmation.

If you require any assistance completing this form, please contact our Savings Team on 01582 765411 or email them at [memberservices@harpendenbs.co.uk](mailto: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](http://harpendenbs.co.uk)

**Harpenden**

Aberdeen House  
14 Station Road,  
Harpenden  
Hertfordshire AL5 4SE

**Tring**

38 High Street  
Tring  
Hertfordshire HP23 5AA

**Radlett**

341 Watling Street  
Radlett  
Hertfordshire WD7 7LB

**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](mailto: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.