

Moneybox - Estate distribution request

Please complete this form so we can arrange the distribution of the account holder's assets.

Account Holder's Details

First Name:	Address:
Surname:	
Date of birth:	Postcode:

Your Details

Full name:
Relationship to account holder:

Address:	Email:
Postcode:	Telephone:

Did the account holder leave a will? <input type="checkbox"/> Yes <input type="checkbox"/> No	Has a Grant of Representation been issued or applied for? <input type="checkbox"/> Yes <input type="checkbox"/> No
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Bank account details for the executor / administrator / solicitor client money account: Bank sort code: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table> Bank account number: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>																			Name of bank: <table border="1"><tr><td></td></tr></table> Account name: <table border="1"><tr><td></td></tr></table>		

Checklist

<p>Please provide the following supporting documents:</p> <ul style="list-style-type: none"> <input type="checkbox"/> A valid photo of the executor or the administrator's ID (such as a passport or driving license) <input type="checkbox"/> A certified copy of the death certificate <input type="checkbox"/> A certified copy of any Will and/or Grant of Representation that exists <input type="checkbox"/> A certified copy of any applicable marriage certificate <input type="checkbox"/> Where the next of kin is a parent of the account holder, a certified copy of the account holder's birth certificate <input type="checkbox"/> Evidence of the bank details as a PDF for the estate executor/administrator (such as a bank statement dated within the last three months or headed confirmation of client account details) <input type="checkbox"/> The Pension Supplementary Information form (if we have supplied one) 	<p><i>This is required for us to verify your identity.</i></p> <p><i>This is required so we can formally record the death.</i></p> <p><i>This is required so that we can act in accordance with these documents.</i></p> <p><i>Please include this if the deceased was married.</i></p> <p><i>Only required where the next of kin is a parent.</i></p> <p><i>Required in order to verify the payment details.</i></p> <p><i>Only needed if we have provided this form.</i></p>
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Declaration

Important

*Where the account holder left no Will and a Grant of Representation **is not** required, we may accept this Estate Distribution request signed by one Personal Representative. Please note that Moneybox may ask for further signatures if needed.*

*Where a copy of the Will and/or any Grant of Representation **is** required or included with this form, please note that we will require this Estate Distribution request to be signed by all of the Personal Representatives authorised to act. If a Personal Representative listed is not acting in the administration of the estate, please include their Reservation of Power or Deed of Renunciation alongside this form.*

By completing and signing this form you are making the following declarations;

- I/We wish for all holdings of the deceased's account to be sold and the proceeds paid to the nominated bank account.
- I am/We are an executor named in the last Will of the deceased, an administrator of the estate, or a solicitor acting on behalf of the executor or administrator.
- The information provided by me/us is true and accurate to the best of my/our knowledge and belief.
- I/We indemnify and continue to indemnify Moneybox against all demands, claims, liabilities, losses, costs and expenses whatsoever which may be incurred in consequence of any payment made as requested by me/us.
- If this declaration is given by more than one Personal Representative, each one of us will be jointly and severally

liable for it.

- If there is any other person with a beneficial interest in the estate or share of these funds, I/we confirm I/we have their consent to accept the funds.

Personal Representative 1

Signature:	Date:
Print name:	

Personal Representative 2

Signature:	Date:
Print name:	

Personal Representative 3

Signature:	Date:
Print name:	

Personal Representative 4

Signature:	Date:
Print name:	