Bereavement Notification & Information Request Form



This form should be competed by the Personal Representative(s) of the deceased customer.

Use this form to notify us of the death of a customer and provide your contact information. Please send this form to us via one of the following methods, along with one of the proof of death documents from the list in Section 3.

- Taken into branch with one of the below proof of death documents
- Posted to our Bereavement Team along with one of the below proof of death documents to the following address, which must be written entirely in block capitals: FREEPOST, SKIPTON BUILDING SOCIETY (please be assured this address is correct despite its simplicity)
- Email us at skiptondirect-bereavementnotification@skipton.co.uk (We may need you to send the proof of death document in the post to us, dependent on your relationship to the deceased and the total balance that is in the account at the date of death.)

If you have any queries regarding this form, you can contact us on 0345 266 1209.

More information regarding our process and requirements and definitions of terms used through this form can be found on our website at skipton.co.uk/bereavement

| Section 1: Details of deceased |
|--|
| Name of deceased: |
| |
| Date of birth: |
| |
| Address: |
| |
| Section 2: Account information |
| Please complete the following section to the best of your knowledge. |
| Sole account(s) |
| Account number(s) (if known) |
| Joint account(s) |
| Do you require date of death balances of any joint accounts for probate/inheritance tax purposes? (authorisation from the joint account holder should be provided to us in order for us to include this |
| Please ensure the old passbook/certificate is returned to us so a new one can be issued. The new passbook/ certificate will be sent directly to the remining account holder(s). |
| If the old passbook/certificate has been lost we will issue a lost passbook/ certificate form to the remaining account holder(s). |
| Mortgage account(s) |
| Account number(s) if known Do you require a redemption statement? |
| Yes |
| Yes |
| Yes |
| Continued overleaf |

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Section 2: Account information (continued) Miscellaneous products & account(s) Account number(s) if known Account type e.g Will/Deeds/Legal care package/Funeral plan Does the deceased hold any product(s) or investment(s) through our Financial Advice Service? Yes No N.B An original Death Certificate may be needed, dependent on who the product(s) or investment(s) are held with. We will write to you to confirm this. Alternatively enclose an original proof of death document with this form. All original documents will be returned to you once the provider(s) have been informed. Section 3: Details of Personal Representative(s) and confirmation of proof of death document being provided. SOLICITOR USE ONLY: If you are a Solicitor, or Probate Practitioner officially appointed to act in the estate, please write your contact details in the boxes below. Please also provide us with written confirmation of what your responsibilities are to the estate, on your official letterhead i.e. whether you are the Personal Representative or whether you are acting on behalf of the Personal representative. If possible, please also confirm if a will has been left: A will has been left. No will has been left. Solicitor name Firm Name Firms SRA/CLC Number Reference Telephone number First Personal Representative (our main contact, if a Solicitor **Second Personal Representative** or Probate Practitioner has not been appointed) Title Forename Title Forename Surname Surname **Current Address Current Address** Postcode Postcode Date of birth (DD/MM/YYYY) Date of birth (DD/MM/YYYY) Are you an existing Skipton Are you an existing Skipton Yes **Building Society Customer? Building Society Customer?** Enter account number Enter account number In what capacity are you acting? In what capacity are you acting? Executor - a will has been left Executor - a will has been left Administrator or next of kin and no will has been left** Administrator or next of kin and no will has been left** Relationship to the deceased customer Relationship to the deceased customer Spouse/Civil Partner Parent Spouse/Civil Partner Parent Adult Child Other (Please state) Adult Child Other (Please state)

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Section 3: Details of Personal Representative(s) and confirmation of proof of death document being provided.

| Third Personal Representative | Fourth Personal Representative |
|--|--|
| Title Forename | Title Forename |
| | |
| Surname | Surname |
| Current Address | Current Address |
| | |
| | |
| Postcode | Postcode |
| Date of birth (DD/MM/YYYY) | Date of birth (DD/MM/YYYY) |
| Are you an existing Skipton Building Society Customer? Yes No | Are you an existing Skipton Building Society Customer? Yes No |
| Enter account number | Enter account number |
| In what capacity are you acting? | In what capacity are you acting? |
| Executor - a will has been left | Executor - a will has been left |
| Administrator or next of kin and no will has been left** | Administrator or next of kin and no will has been left** |
| Relationship to the deceased customer | Relationship to the deceased customer |
| Spouse/Civil Partner Parent | Spouse/Civil Partner Parent |
| Adult Child Other (Please state) | Adult Child Other (Please state) |
| | |
| **We are authorised to provide information to next of kin in order of come from the Treasury Solicitor appointed to administer the estate | |
| Please indicate below if there is or will be an application for either a (in Scotland). | a Grant of Probate, Letters of Administration, Certificate of Confirmation |
| Yes* No Not sure/aware at this time | |
| *If Yes: We will need to see this document before any sole account(Prior withdrawals can be made to cover funeral costs/ inheritance to Please contact us for more information. | |
| Proof of death document(s) | Posted or taken into a branch. Sent by email. |
| Original death certificate | |
| Solicitor certified copy Death Certificate | |
| Death certificate verification form administered by a solicitor | |
| Coroner's interim death certificate | |
| Original grant of representation if available | |
| Solicitor certified copy Grant of Representation if available | |

Call 0345 266 1209





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