

Personal Representative Closure Form

This form is to be completed where the total balance of the account(s) held is £30,000 or above or where a Grant of Probate/Letters of Administration has been obtained regardless of the balance.

For balances up to £30,000 where a Grant of Probate/Letters of Administration has not been and will not be obtained, you will need to complete a Statutory Declaration Form. You can request a copy of this form by visiting one of our branches, looking at our website www.westbrom.co.uk or by calling our Customer Service team on 0345 241 3785.

Information about the deceased

Name of the deceased:

Title (e.g. Mr/Mrs/Ms):

Surname:

Forename(s):

Account number(s):

Account number:

Account number:

Account number:

Account number:

Account number:

Account number:

Please note: we will close all accounts held by the deceased unless you tell us otherwise

Personal Representative Details

First Personal Representative

Title (e.g. Mr/Mrs/Ms):

Surname:

Forename(s):

Address:

Postcode:

Date of Birth*:

Telephone number (Landline):

Mobile:

Email:

Second Personal Representative

Title (e.g. Mr/Mrs/Ms):

Surname:

Forename(s):

Address:

Postcode:

Date of Birth*:

Telephone number (Landline):

Mobile:

Email:

Before any funds can be released we will need to identify all acting Personal Representatives. In the first instance, the Society will attempt to check your identity electronically based on the information you provide. By signing this form you give your consent for us to do this. If we are unable to do this, we will require documents to verify your identity. We will let you know if these are required.

* This is required to complete electronic identification

Any information provided by you may be held by West Bromwich Building Society (as Data Controller) in our records and may be shared within West Bromwich Building Society Group of companies, as well as with Fraud Prevention Agencies. For further information about how we will use your personal information and your rights under Data Protection legislation, please refer to the Third Party Privacy Notice which is available at www.westbrom.co.uk/privacy-notice.

If you have any questions about the information provided, please write to the Data Protection Officer at West Bromwich Building Society, 2 Providence Place, West Bromwich B70 8AF.

Closure instructions

Please issue a closing cheque made payable to

Or

Please transfer the closing balance to the following West Brom account

First Personal Representative Signature:

Second Personal Representative Signature:

Date (DD/MM/YYYY):

Date (DD/MM/YYYY):

Checklist

- Have you enclosed the original Grant of Probate/Letters of Administration?
- Has the form been signed by a Personal Representative? (If the Personal Representatives have been appointed jointly then they must all sign this form.)

Notes

We need to identify all Personal Representative who have signed this form unless the Personal Representative is an existing Customer who we have previously identified.

Head Office: 2 Providence Place, West Bromwich B70 8AF.

www.westbrom.co.uk

Calls and electronic communications may be monitored and/or recorded for your security and may be used for training purposes. Your confidentiality will be maintained.

The West Brom is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority. Register No. 104877.

'the West Brom' is a trading name of West Bromwich Building Society.

