

Account closure form



West Brom
Building Society

This form is to be completed where:

- The total balance of the account(s) held is £30,000 or more.
- You have the Grant of Probate/Letters of Administration, regardless of the balance.

Information about the person who passed away

Title:

First name(s):

Surname:

Account number(s):

Account number:

Account number:

Account number:

Account number:

Account number:

Account number:

Please note: we'll close all accounts held by the person who passed away unless you tell us otherwise.

Executor(s) details

First Executor

Title:

First name(s):

Surname:

Address:

Postcode:

Date of Birth*:

Contact number:

Email:

Second Executor

Title:

First name(s):

Surname:

Address:

Postcode:

Date of Birth*:

Contact number:

Email:

Third Executor

Title:

First name(s):

Surname:

Address:

Postcode:

Date of Birth*:

Contact number:

Email:

Fourth Executor

Title:

First name(s):

Surname:

Address:

Postcode:

Date of Birth*:

Contact number:

Email:

* We need this so we can check your identity electronically.

Executor(s) details (continued)

Before we can release any funds, we need to identify all Executor(s). We'll try to do this electronically based on the information given to us. By signing this form, you're giving consent for us to do this. If we can't do this, we'll get back in touch and let the Executor(s) know what we need. If the Executor(s) is an existing customer, we won't need to identify them.

Any information you give us 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'll use your personal information and your rights under Data Protection legislation, see 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 Executor signature:

Second Executor signature:

Date (DD/MM/YYYY):

Date (DD/MM/YYYY):

Third Executor signature:

Fourth Executor 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 the Executor(s)? (The form must be signed by all Executors.)

Notes

We need to identify all Executors who have signed this form unless they're existing customers.