

Guidance Notes for Completion

Please ensure you read the details at the top of the form.

This information is very important and will guide you through the requirements regarding completion of the form.

It is important that the form is completed in full. If any of the sections are incomplete or incorrectly completed, we may have to return the form to you, which will delay the release of the funds.

The following information, which refers to the sections on the form, may assist you further:-

SECTION D

This section is for the details of the next of kin / executor(s) completing the form. Not all eligible next of kin / executor(s) need to complete the form, provided that every other person eligible to complete the form is noted in section E.

The cheque for funds on closure of the account will be made payable to the parties noted in sections D and F.

SECTION E

The relevant declaration should be completed (delete as appropriate) – where there is an eligible next of kin / executor who is not signing the form please list their name(s) in the box provided.

Please note that in the case of the Will Indemnity form, the original or a certified copy of the will is required.

SECTION G

A Commissioner for Oaths or solicitor empowered to administer oaths must witness the form where the balance including accrued interest is £500 or above (up to a maximum of £15,000).

IMPORTANT NOTE

Legislation allows the Society to release the funds without probate or grant of letters of administration (please note our maximum limits quoted in Section G) where the person(s) signing provides a statutory declaration.

This declaration has to be checked, completed and signed by a Commissioner for Oaths or Solicitor empowered to administer oaths as indicated on the form. This is a compulsory requirement and the Society will not allow release of the funds without this.

The final decision of whether or not to release the funds is entirely at the Society's discretion. Any request to release the funds over £500 will not be considered unless section G is duly completed.

FURTHER ASSISTANCE

If you require any further assistance regarding completion of the relevant form or need any further information please contact your local branch in the first instance (where applicable), or call our **Customer Contact Centre on (0113) 225 7777**.