

Moneybox - Estate distribution request

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

This form must be completed by a Personal Representative — the executor(s) with a Grant of Probate, the administrator(s) with Grant of Letters of Administration, or, where these are not required based on plan value, the deceased's next of kin.

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? ☐ Yes ☐ No	Has a Grant of Representation been issued or applied for? ☐ Yes ☐ 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></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></tr></table>															Name of bank: <table border="1"><tr><td></td></tr></table> Account name: <table border="1"><tr><td></td></tr></table>		

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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:	

Checklist

Please provide the following supporting documents:

- ☐ A valid photo of your ID (such as a passport or driving license)
- ☐ A copy of the death certificate
- ☐ A copy of any Will and/or Grant of Representation that exists
- ☐ A copy of any applicable marriage certificate
- ☐ A copy of the account holder's birth certificate
- ☐ A bank statement dated within the last three months **or** letterheaded confirmation of the bank details provided above.
- ☐ The Pension Supplementary Information form (if we have supplied one)

This is required for us to verify your identity - we are unable to accept scans or photocopies unless certified

This is required so we can formally record the death.

This is required so that we can act in accordance with these documents.

Only required where the deceased was married.

Only required where the next of kin is a parent.

Required in order to verify the payment details.

Only needed if we have provided this form.