



## BEREAVEMENT - REQUEST TO CLOSE ACCOUNT(S)

You will need to complete different sections of this form depending on the total balance(s) of the late customer's account(s). Please complete the relevant sections so we can process your request correctly.

*(This form should be completed if the late customer was a signatory on a nominee account – see glossary)*

**If you are applying for or have already obtained a Grant of Probate/Letters of Administration we must see the original document or a certified copy regardless of the balance amount before we can close an account. (This form must be signed by all persons named in the Grant of Probate/Letters of Administration).**

### Completing this form

- **Balances of £5,000 or less (where Grant of Probate/Letters of Administration has not been obtained).**  
Sections 1, 2 and 3 to be completed by all Personal Representative(s).
- **Balances of £5,000 to £25,000 (where Grant of Probate/Letters of Administration has not been obtained),**  
Sections 1, 2 and 4 to be completed by all Personal Representative(s).  
Section 5 to be completed by a Solicitor.
- **Balances of £25,000 and above (or where a Grant of Probate/Letters of Administration has been obtained).**  
Sections 1, 2 and 6 to be completed by all Personal Representative(s) irrespective of balance amount.

### 1. DETAILS OF THE LATE CUSTOMER

Account number(s)

Title  First name(s)  Surname

Residential address   
Postcode

Date of birth    Date of death

**N.B. All accounts will be closed**

### 2. DETAILS OF THE PERSONAL REPRESENTATIVE(S)

(i) Title  First name(s)  Surname

Residential address   
Postcode

Contact telephone numbers Daytime  Mobile

Relationship to deceased

(ii) Title  First name(s)  Surname

Residential address   
Postcode

Contact telephone numbers Daytime  Mobile

Relationship to deceased

## DECLARATIONS OF PERSONAL REPRESENTATIVE(S)

### 3. DECLARATION AND SIGNATURE FOR CLOSURE OF ACCOUNT BALANCES OF £5,000 OR LESS (where Grant of Probate/Letters of Administration has not been obtained)

*In order for Progressive Building Society to close any savings accounts where the total balance(s) is under £5,000 we must see the original death certificate or a certified copy together with this completed form and the passbook(s), if it is a passbook based account. If a death certificate is not available an interim death certificate or a coroner's certificate will suffice.*

I/We, the named Personal Representative(s) (where there is no will), confirm:

- no Grant of Probate/Letters of Administration has been granted to the late customer's estate;
- I am/we are legally entitled to administer the late customer's estate;
- I/we hereby agree to indemnify Progressive Building Society against all claims, proceedings, damages and expenses by reason of it paying over funds standing to the credit of the deceased (such funds not exceeding £5,000) or acting in accordance with my/our written instructions.

Please tick the appropriate box below.

The closure monies should be transferred to the following Progressive account.

Account number

The closure cheque should be payable to

Signature of Personal Representative

Date

Signature of Personal Representative

Date

#### Use of your information

I/We understand that the personal data disclosed by me/us as Personal Representative(s) will be retained securely by the Society until deletion of the deceased's account details, in accordance with the Society's data retention policy.

### 4. DECLARATION AND SIGNATURE FOR CLOSURE OF ACCOUNT BALANCES BETWEEN £5,000 AND £25,000 (where Grant of Probate/Letters of Administration has not been obtained)

*In order for Progressive Building Society to close any savings accounts where the total balance(s) is between £5,000 and £25,000 we must see the original death certificate or a certified copy together with this completed form and the passbook(s), if it is a passbook based account. If a death certificate is not available an interim death certificate or a coroner's certificate will suffice.*

I/We, the named Personal Representative(s) (where there is no will), do solemnly declare that:

- no Grant of Probate/Letters of Administration has been granted to the late customer's estate;
- I am/we are legally entitled to administer the late customer's estate;
- I/we hereby agree to indemnify Progressive Building Society against all claims, proceedings, damages and expenses by reason of it paying over funds standing to the credit of the deceased (such funds not exceeding £25,000) or acting in accordance with my/our written instructions.

Please tick the appropriate box below.

The closure monies should be transferred to the following Progressive account.

Account number

The closure cheque should be payable to

I/We, the Personal Representative(s) (where there is no will), make this solemn declaration conscientiously believing the same to be true and by virtue of the provisions of the Statutory Declaration Act 1835.

Signature of Personal Representative

Date

Signature of Personal Representative

Date

**Use of your information**

I/We understand that the personal data disclosed by me/us as Personal Representative(s) will be retained securely by the Society until deletion of the deceased's account details, in accordance with the Society's data retention policy.

**5. TO BE COMPLETED BY A SOLICITOR IF YOU HAVE COMPLETED SECTION 4**

Declared at

Postcode

Before me

*(Name of Solicitor and the name of their firm/company)*

Signature

Date

Official Stamp

**6. SIGNATURE FOR CLOSURE OF ACCOUNT BALANCES OF £25,000 OR ABOVE  
(or for any amount where Grant of Probate/Letters of Administration has been obtained)**

**N.B. All Personal Representatives must sign this form**

*In order for Progressive Building Society to close any savings accounts where the total balance is over £25,000 a Grant of Probate/Letters of Administration must be obtained and we must see the original document or a certified copy together with this completed form and the passbook(s), if it is a passbook based account.*

Please tick the appropriate box below.

The closure monies should be transferred to the following Progressive account.

Account number

The closure cheque should be payable to

Signature of Personal Representative

Date

Signature of Personal Representative

Date

**Use of your information**

I/We understand that the personal data disclosed by me/us as Personal Representative(s) will be retained securely by the Society until deletion of the deceased's account details, in accordance with the Society's data retention policy.

## FOR BRANCH USE ONLY

<b>Details of proof of death obtained</b>	
<b>Identification for Personal Representatives/Executors</b>	
<b>Cashier's initials</b>	
<b>Branch code</b>	

## HELPFUL NOTES

Please remember that we are here to help. You can call us on 0800 029 4998, opening hours are Monday to Friday 9.00am – 5.00pm.

Section 1	This section will contain the details of the deceased customer.
Section 2	This section will contain the details of the person(s) acting as Personal Representative(s) (where there is no will)
Section 3	This section provides for an indemnity to close total balances below £5,000. This section must be signed by the Personal Representative(s) (where there is no will)
Section 4	This section provides for an indemnity to close total balances between £5,000 and £25,000. This section must be signed by the Personal Representative(s) (where there is no will). If this section has been completed then a Solicitor must complete and sign section 5.
Section 5	This section must be completed, signed and officially stamped by a Solicitor.
Section 6	This section must be completed for balances over £25,000 or if a Grant of Probate/ Letters of Administration has been granted to the late customer's estate regardless of the balance. We will require the signatures of all the Personal Representative(s) in order to close the account(s) and release the funds.

## GLOSSARY

Nominee account	An account in which the named holder holds funds on behalf of another (the beneficiary), e.g. a parent holding an account on behalf of a child.
Certified copy	A copy of the original document which has been signed and dated by a person who holds a position of responsibility such as a solicitor, doctor, minister of religion, teacher, hostel manager or a social worker. The person will certify the document by writing on it 'true copy of the original'.
Personal Representative(s)	The general term for an Executor or Administrator.
Grant of Probate/ Letters of Administration	A document issued with a government seal legally confirming that the person or persons named on the document are irrefutably handling the affairs of the deceased.
The estate	A person's estate includes everything they own and everything that's in their name.