

2 WITHDRAWAL OR TRANSFER OF INVESTMENTS OR SALE PROCEEDS (CONTINUED)

Notes

1. Investment: Enter the full name and class of each investment you wish to make. This is important as there may be different classes available.
2. Sale: The combined proceeds of all the sales will be sent to you by cheque/BACS.
3. Withdrawing shares into the names of the personal representatives: Investments will be transferred into the names of the personal representatives and the certificate will be sent to you when we receive it from the Registrar (this may take several weeks). Where all investments are to be transferred out, we will, unless otherwise instructed, remit any cash. A transfer charge will be deducted from each Security Account at the time of withdrawal.

Sell all investments

3 TRANSFER INVESTMENTS INTO ANOTHER NOMINEE

If you would like investments transferred to a nominee Account with another provider, contact the other provider to arrange a transfer and check the terms on which they will be accepted, particularly any charges involved. Transfers will only be carried out in this manner into the names of the legal personal representatives. Provide the following information about the new provider to whom you wish to transfer.

Name of Other Provider:

Contact Name:

Account number:

Address:

Postcode:

Email:

Telephone Number:

4 PAYMENT DETAILS

I/We confirm that this Account is to be closed and the proceeds be withdrawn by: (Please tick box 1 or 2)

BACS transfer (free)

CHAPS payment (£20 charge)

If you do not tick a box above, we will pay withdrawals to the first named Executor by cheque.

I/We confirm that this cheque forms part of the deceased's estate.

Bank details

If you wish the cash to be paid to a bank account, provide the bank account details below. We can only make payments to UK-based bank accounts.

Account Name:

Name of Bank or Building Society:

Account Number:

Sort Code:

Building Society Roll Number:

Address:

Postcode:


5 NOTES – PLEASE READ THESE NOTES CAREFULLY BEFORE SIGNING THIS FORM

Withdrawals from different General Investment Accounts and ISAs held by the deceased will not be combined.

6 DECLARATION AND AUTHORITY


Ensure all legal personal representatives sign this section.

I/We hereby authorise you to implement the above instructions on my/our behalf in accordance with the Terms and Conditions. We are fully authorised to complete this form and give you instructions in respect of this Account.

Legal personal representative's signature: 


Print Name: _____

Date: | D | D | M | M | Y | Y | Y | Y |

Legal personal representative's signature: 


Print Name: _____

Date: | D | D | M | M | Y | Y | Y | Y |

Legal personal representative's signature: 

Print Name: _____

Date: | D | D | M | M | Y | Y | Y | Y |

Legal personal representative's signature: 

Print Name: _____

Date: | D | D | M | M | Y | Y | Y | Y |