

# Will Indemnity Closure Form

Complete this form if the account holder has died leaving a Will and you are appointed Executor to their estate. The total balance of all accounts held with the Society, in the sole name of the deceased, must be less than £40,000.

**If the total balance exceeds £40,000 you need to provide a Grant of Probate instead of completing this form.**

As an Executor you must act in accordance with the duties of your Executor's oath and distribute the estate to the beneficiaries in accordance with the deceased's Will.

By signing this form you will close the deceased's account(s) with the Society and agree to indemnify the Society from and against all claims and demands against the funds of the Society from any other person, in respect of closure of the deceased's account(s).  
**A cheque for each of the account balances shall be made payable to the Executor(s) who's signed below. If there is more than one Executor signing this form, a cheque will be made payable in both their names.**

## A. DETAILS OF THE DECEASED

Forename(s):	<input style="width: 95%;" type="text"/>
Surname:	<input style="width: 95%;" type="text"/>
Date of death:	<input style="width: 15%;" type="text"/> / <input style="width: 15%;" type="text"/> / <input style="width: 20%;" type="text"/>

<b>B. Account Numbers:</b>	<input style="width: 95%;" type="text"/>
	<input style="width: 95%;" type="text"/>
	<input style="width: 95%;" type="text"/>

## C. NAME(S) AND ADDRESS(ES) OF EXECUTOR(S) COMPLETING AND SIGNING THIS FORM

Forename(s): <input style="width: 95%;" type="text"/> Surname: <input style="width: 95%;" type="text"/> Address: <input style="width: 95%;" type="text"/> Postcode: <input style="width: 95%;" type="text"/> Relationship to the deceased: <input style="width: 95%;" type="text"/>	Forename(s): <input style="width: 95%;" type="text"/> Surname: <input style="width: 95%;" type="text"/> Address: <input style="width: 95%;" type="text"/> Postcode: <input style="width: 95%;" type="text"/> Relationship to the deceased: <input style="width: 95%;" type="text"/>
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**Cheques can only be made payable to those Executors signing below except where, on production of the appropriate evidence, the cheque is for funeral expenses, or Inheritance Tax and is made payable to HM Revenue and Customs.**

## D. DECLARATIONS

I / We do solemnly and sincerely declare: **(Please delete one of these statements as appropriate)**

- I am / We are the appointed Executor(s) in the deceased's Will and there are no other appointed Executors **OR** I am one of / We are two of the Executor(s) appointed in the deceased's Will and the other Executor(s) are:

- I / We hereby request the Society to close the above account(s) and transfer to me / us the balance in each account by cheque, such total balance not exceeding £40,000.
- I / We hereby undertake to indemnify the Society from and against all claims and demands against the funds of the Society from any other person in respect of the closure of the account(s) held by the deceased detailed above.
- I / We attach or have already provided the Society with an original or certified copy of the death certificate of the deceased.
- I / We attach or have already provided the Society with an original or certified copy of the Will of the deceased.
- I / We make the solemn declaration conscientiously believing the same to be true and by virtue of the provisions of the Statutory Declarations Act 1835.

## E. SIGNED (EXECUTOR(S))

Signature: <input style="width: 95%;" type="text"/>	Signature: <input style="width: 95%;" type="text"/>
Date: <input style="width: 15%;" type="text"/> / <input style="width: 15%;" type="text"/> / <input style="width: 20%;" type="text"/>	Date: <input style="width: 15%;" type="text"/> / <input style="width: 15%;" type="text"/> / <input style="width: 20%;" type="text"/>

## F. DECLARATION FROM COMMISSIONER FOR OATHS / SOLICITOR EMPOWERED TO ADMINISTER OATHS

Declared at: <input style="width: 95%;" type="text"/>	Forename(s): <input style="width: 95%;" type="text"/>
In County of: <input style="width: 95%;" type="text"/>	Surname: <input style="width: 95%;" type="text"/>
This day of: <input style="width: 10%;" type="text"/> / <input style="width: 10%;" type="text"/> / <input style="width: 20%;" type="text"/> before me:	Address: <input style="width: 95%;" type="text"/>
Signature: <input style="width: 95%;" type="text"/>	(including Postcode)

## Guidance Notes for Completion

This information will guide you through the requirements for completing this form.

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

Complete all sections providing details of the deceased, the deceased's account(s) held with the Society, your details and those of any other Executor to the deceased's estate.

### Section B

Any monies in accounts held in joint names with the deceased will automatically be transferred to the name(s) of the surviving account holder(s). **Don't include details of such accounts on this form.**

### Section C

This section is for the details of the executor(s) completing the form.

Not all eligible Executor(s) need to complete the form, provided that every other person eligible to complete the form is noted in section D.

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

### Section D

The relevant declaration should be completed (delete as appropriate) – where there's an eligible Next of Kin/ Executor who isn't signing the form, please list their name(s) in the box provided.

Please note we need the original or a certified copy of the Will.

### Section F

A Commissioner for Oaths or solicitor empowered to administer oaths must witness and sign the form where the balance, including accrued interest, is £1,500 or above (up to a maximum of £40,000) before returning it to us.

If the total amount of the account balances is less than £1,500, a solicitor isn't required to sign.

### 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 D) 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 release 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 funds over £1,500 will not be considered unless section E 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, or call our Customer Contact Centre on 03450 50 50 75\*.

\*We may monitor and/or record your telephone conversations with the Society to ensure consistent service levels (including colleague training).