Cynergy Bank

Bereavement notification

- We are sorry to hear of your loss, please accept our deepest condolences. We have put together this form for us to gather all the information to help you administer the Estate of our late customer. Please **fully complete**, in **black ink**, all parts of the form including the relevant declaration section to enable us to review the case as quickly as possible.

1. Details of our deceased customer

Title Mr Mrs Miss Other

First name

Surname

Gender Male Female

Account no. 1

Account no. 2

*If more than 2 accounts please quote in the special instructions.

Address

Post code

Date of birth / /

Date of death / /

2. Details of 1st Personal Representative

Title Mr Mrs Miss Other

First name

Surname

Address

Post code

Home telephone

Mobile telephone

Relationship to the deceased

Do you hold an account with Cynergy Bank Yes No

Account no.

Details of 2nd Personal Representative

Mr Mrs Miss Other

Yes No

Special instructions

3. Did our customer leave a Will?

Please complete this section as it will help us decide which documents are required to close the deceased's account(s).

a) Do you know the approximate size of the Estate? Yes ☐ No ☐

If "Yes", please specify the approximate amount £

b) Did the deceased leave a Will? Yes ☐ *attach a copy* No ☐ Not known ☐

If "Yes" (the deceased left a Will), does anyone intend to apply or has anyone applied for a Grant of Probate? Yes* ☐ No ☐ Not known ☐

*If yes, please refer to section 4.

If "No" (the deceased did not leave a Will), does anyone intend to apply or has anyone applied for a Grant of Letters of Administration? Yes* ☐ No ☐ Not known ☐

*If yes, please refer to section 4.

4. Settling the Estate

To enable us to settle the Estate of our deceased customer, we shall require the following:

1. Original or certified copy of the Death Certificate
2. Original Grant of Probate or Grant of Letters of Administration if balance is over £20,000.00
3. Signed instructions of Personal Representative(s) advising how to disperse the funds
4. Certified copy of ID and proof of address (dated within 3 months) of Personal Representative(s) (if applicable)

Who can certify your documents

Your documents must be certified by one of the following independent professionals:

Certified copies must be stamped to indicate they are 'true copies of the original'. The certification must also include:

Your documents must be certified by one of the following independent professionals:

- A UK or equivalent:
  - Regulated financial institution
  - Registered solicitor/lawyer
  - Registered accountant
- A UK Post Office
- Certifying professionals outside the UK may also be acceptable (see guidance above).

Information the certifier must include

The certifier must clearly provide:

• The name and address of their firm/organisation (including an official business stamp, where available)

• Their full name, email address, telephone number, and signature, along with the capacity in which they are signing

• The name of their regulatory body (e.g., ACA, ACCA, SRA, Law Society) and their registration number

• The date of certification

How the certification must appear

• Documents must be clear, easy to read, and dated within the last 3 months (unless your request specifies otherwise)

• For photo ID, the image must be clear, the individual must be recognisable, and the document must be in date

• All certified documents must include the following wording: **"Certified as a true copy of the original document."**

• For identification documents, the certification must also confirm likeness:

5. Declaration to release information to the next of kin where no Will is held

I/we confirm that I am/we are the deceased's next of kin and that I/we intend to apply for a Grant of Letters of Administration. To the best of my/our knowledge, there is no other person who is willing and able to apply for a Grant of Letters of Administration and/or a person who has a greater entitlement will not apply for the Grant.

		/ /
Print name of 1st Personal Representative	Specimen signature	Date
		/ /
Print name of 2nd Personal Representative	Specimen signature	Date

Office use only

Documents attached

Mandatory documents

☐ Certified copy of Death Certificate

☐ Certified copy of ID and proof of address (dated within 3 months) of Personal Representative(s) (if applicable)

Funeral documents

☐ Original funeral invoice (if applicable)

Other documents

☐ Original or certified Grant of Probate or Grant of Letters of Administration

☐ Copy of the Will

☐ Signed instructions of Personal Representative(s) advising how to disperse the funds

Interviewing Officer _____ Date / /