



# Personal Representative's Closure form (Master)

This Master form and any associated Additional form shall be construed as one document and that any information/ declarations provided in this Master form shall be construed as if it had also been made/provided in any associated Additional form and vice versa. Also, any reference to "we", "our", "us" and "you" shall be construed as including all signatories to each of this Master form and any associated Additional form

## Completing this form

**Please fill in the form using BLOCK CAPITALS and tick any boxes which apply**

This closure form should be used in all circumstances, please specify below your position in terms of Grant of Probate or Letters of Administration:

We are applying or have applied       This is not required

## Details of Deceased Customer

Customer Name(s)

Customer Reference   
eg. XDECPY1234567890

## Personal Representative

Please confirm in what capacity you are acting by ticking the box which applies

Executor(s) of a Will       Next of Kin: no valid Will exists       3rd Parties (eg Solicitors)

### Personal Representative 1

Full Name

Relationship to the deceased

Address (including post code)

Contact Number

### Personal Representative 2

**Note:** If you need to add further details please use additional sheets, how many additional sheets are there:

None       One       Two       More

## Payment and Closure instructions

Please close the deceased's account(s) and/or sell/transfer any investment(s) and/or pay any valid claims made on the deceased's life/investment policy(ies) and release any items in safe keeping or held as security with HSBC. I/We authorise HSBC to repay any outstanding balances held on any HSBC credit card, personal loan and/or overdraft(s) prior to the release of any final credit balances. I/We request that the Fixed Rate Savings Account(s) referred to below remain open until maturity

Sort Code --      Account No.

**Please pay the balances to:**

Name of Account Holder

Name of Bank or Building Society

Payments cannot be made directly into an ISA

Sort Code --      Account No.

Account Reference/ Roll No.

The transfer will be subject to regulatory checks to comply with current Legal, Compliance and Money Laundering Regulations which may delay the transfer. HSBC will let you know if it's unable to transfer the money. For currency transfers HSBC will use the currency exchange rate at the time of the transfer and for overseas payments it will also require the following details:

IBAN Code	<input type="text"/>	Swift Code	<input type="text"/>
Country	<input type="text"/>	Currency Required	<input type="text"/>

## Safe Keeping/Security

If HSBC is holding any item(s) in safe keeping or security for the deceased please arrange for these item(s) to be collected from the branch holding any items.

## Future Correspondence (if multiple forms being completed please ensure all details are consistent)

Please arrange for all future correspondence to be sent to:

Name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Post code	<input type="text"/>

## Declaration

By signing this form I/We confirm:

- the information we or any one of us provide or have provided to HSBC in the course of our dealings with HSBC in relation to the relevant deceased person's estate is correct to the best of my/our knowledge including any information contained within any applicable Master and associated Additional form
- that I/we are legally entitled to administer the deceased's estate (in accordance with what is stated in the Will or the laws of intestacy if no Will exists)

Where HSBC have agreed to release funds without Grant of Probate or Letters of Administration the following will also apply:

- accept that if any other parties come forward who have a valid claim on the deceased's estate you will be liable to repay the monies/return items or pay the equivalent value of items released to HSBC.
- to be responsible to HSBC in respect of any and all losses, costs or expenses HSBC incurs in dealing with any claims or demands which may be made by or against HSBC as a consequence of HSBC paying the monies and/or claims, selling or transferring investments and/or releasing any items to me/us without my/our obtaining a Grant of Probate or Letters of Administration, if other parties lodge a valid claim
- to the best of our knowledge the deceased's estate is not insolvent
- that to establish full legal authority and legal title to deal with the deceased's affairs if at any time it is requested to attach signatures of everyone who is administering the estate

Please note that in the circumstances, if required, HSBC may instigate legal proceedings to recover the monies paid/items released to you.

## Your Signatures

If you are unsure about the nature of the declarations and confirmations that you are providing by virtue of signing this form, we suggest that you seek independent legal advice.

### Personal Representative 1

Signature	<input type="text"/>
Date	<input type="text"/>

### Personal Representative 2

Signature	<input type="text"/>
Date	<input type="text"/>

Should you have any questions about completing this form please call our Bereavement Support Team 0345 850 0088.

Please call us between 8.30am and 6pm Monday to Friday and Saturday 9am to 2pm (excluding bank holidays) or if calling from overseas, +44 (0) 114 252 0249. Textphone 03457 125563. Subject to scheduled and emergency maintenance periods. To help us continually improve our service, and interests of security, we may monitor and/or record your calls with us.

For a glossary of terms please refer to our bereavement guide or the glossary that can be found at [www.hsbc.co.uk/bereavement](http://www.hsbc.co.uk/bereavement)

## hsbc.co.uk

### Issued by HSBC Bank plc

Customer Information:

PO Box 6201, Coventry CV3 9HW

PO Box 14, St Helier, Jersey JE4 8NJ

PO Box 31, St Peter Port, Guernsey GY1 3AT

PO Box 20, Douglas, Isle of Man IM99 1AU

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# Additional Personal Representative's Closure form

This Additional form and the associated Master form shall be construed as one document and that any information/ declarations provided in this Additional form shall be construed as if it had also been made/provided in the associated Master form and vice versa. Also, any reference to "we", "our", "us" and "you" shall be construed as including all signatories to each of this Additional form and the associated Master form.

## Details of Deceased Customer

Customer Name(s)	<input type="text"/>
Customer Reference	<input type="text"/>

eg. XDECPY1234567890

## Personal Representative

	Personal Representative 3	Personal Representative 4
Full Name	<input type="text"/>	<input type="text"/>
Relationship to the deceased	<input type="text"/>	<input type="text"/>
Address (including post code)	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Contact Number	<input type="text"/>	<input type="text"/>

## Payment and Closure instructions

Please close the deceased's account(s) and/or sell/transfer any investment(s) and/or pay any valid claims made on the deceased's life/investment policy(ies) and release any items in safe keeping or held as security with HSBC. I/We authorise HSBC to repay any outstanding balances held on any HSBC credit card, personal loan and/or overdraft(s) prior to the release of any final credit balances.

## Declaration

By signing this form I/We confirm:

- the information we or any one of us provide or have provided to HSBC in the course of our dealings with HSBC in relation to the relevant deceased person's estate is correct to the best of my/our knowledge including any information contained within any applicable Master and associated Additional form
- that I/we are legally entitled to administer the deceased's estate (in accordance with what is stated in the Will or the laws of intestacy if no Will exists)

Where HSBC have agreed to release funds without Grant of Probate or Letters of Administration the following will also apply:

- accept that if any other parties come forward who have a valid claim on the deceased's estate you will be liable to repay the monies/return items or pay the equivalent value of items released to HSBC.
- to be responsible to HSBC in respect of any and all losses, costs or expenses HSBC incurs in dealing with any claims or demands which may be made by or against HSBC as a consequence of HSBC paying the monies and/or claims, selling or transferring investments and/or releasing any items to me/us without my/our obtaining a Grant of Probate or Letters of Administration, if other parties lodge a valid claim
- to the best of our knowledge the deceased's estate is not insolvent
- that to establish full legal authority and legal title to deal with the deceased's affairs if at any time it is requested to attach signatures of everyone who is administering the estate

Please note that in the circumstances, if required, HSBC may instigate legal proceedings to recover the monies paid/items released to you.

## Your Signatures

If you are unsure about the nature of the declarations and confirmations that you are providing by virtue of signing this form, we suggest that you seek independent legal advice.

### Personal Representative 3

Signature

Date

### Personal Representative 4

Signature

Date

**hsbc.co.uk**

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