

Deceased Customer – Guidance and Notification

Deceased Customer - Guidance

If a customer has died and you are their representative/executor/next of kin, you must inform us as soon as practicable.

Please review and complete the notification below. Please send this to:

- Email: customer.services@royalmint.com
- Mail: Customer Services Team, PO Box 500, Pontyclun, CF72 8WP

We will contact you to confirm receipt of your notification and inform you if we require any additional information.

Please note that before providing information as to a deceased customer's account status, such as whether they held a secure storage box, what the balance of their account is or what, if anything, they held in the vault, we will require a certified copy of the customer's death certificate and confirmation that you are entitled to administer the customer's estate.

For example, if you are an executor and this is specified in the customer's will, then we will require a certified copy of that will. If the customer did not complete a will, we would require a declaration to that effect to be made and that you are the customer's 'next of kin'. Ordinarily this means a widow/widower or surviving civil partner, child, parent, brother or sister, or other relative or entitled person.

Depending on the deceased customer's account status, we may require a certified copy of a Grant of Representation, Grant of Probate or Confirmation (Scotland). We may ask for this if the customer held a secure storage box and/or holdings valued £5,000.00 or more. However, we reserve the right to request this regardless of whether a secure storage box is held and/or holdings are valued £5,000.00 or more.

We may also conduct certain credit, identity and residency checks on you as the customer's representative/executor/next of kin for the purposes of anti-money laundering, identification and risk mitigation.

Please contact customer services should you have any questions on 0800 032 2154.



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Deceased Customer - Notification

Deceased Customer's Personal Details

Account Number:

Full Name:

Date of Birth:

Address (including postal code):

Date of Death:

Place of Death:

Was a husband, wife or civil partner living when the customer died? **Yes; No; Not Applicable**

If **yes**, please give their full name:

Your Personal Details

Full Name:

Date of Birth:

Address (including postal code):

Telephone Number:

Entitlement to Administer Deceased Customer's Estate

Did the customer make a will? **Yes; No**

If **yes**, please give the full name(s) of the Executor(s) as show on the Will:

In what capacity are you claiming entitlement to administer the deceased customer's estate?
(Representative, executor, next of kin etc.)

If you are claiming to be next of kin, how are you related to the deceased customer?
(Widow/widower or surviving civil partner, child, parent, brother or sister, etc.)

Please note that if the deceased customer did not make a will and your entitlement to administer the deceased customer's estate is based on your status as 'next of kin', this ordinarily means a widow/widower or surviving civil partner.

Do you have or are you obtaining a Grant of Representation, Grant of Probate or Confirmation (Scotland) **Yes; No**



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Please ensure that you include appropriate evidence with your notification as to your entitlement to administer the deceased customer's estate:

- Certified* copy of the customer's death certificate
- Certified* copy of the customer's Will (If applicable)
- Certified* copy of a Grant of Representation, Grant of Probate or Confirmation (Scotland). (If this has already been granted)

* Certification must state the copy is a "true copy of the original" and must state the certifier's:

- Full name;
- Position/status;
- Address; and
- Date of certification.

Please note that certification must be conducted by an appropriate person. This is someone in a position of responsibility, who knows, and is known by, you and may reasonably confirm your identity and the validity of the document concerned. For examples as to who is classed as an appropriate person please see: <https://www.gov.uk/countersigning-passport-applications/accepted-occupations-for-countersignatories>

Declaration of Entitlement to Administer Deceased Customer's Estate

I confirm that I am entitled to administer the estate of the deceased customer. I agree to you carrying out certain credit, identity and residency checks for the purposes of anti-money laundering, identification and risk mitigation, and shall provide you with such documentation as you may require to satisfy these purposes. I agree not to infringe on any rights of The Royal Mint or those of its licensees, including intellectual property rights such as copyright or trademark rights. I am not currently restricted from using The Royal Mint's services or otherwise prohibited from having a customer account. I agree to abide by The Royal Mint terms of use of its websites and its terms and conditions as if a guest and/or customer of The Royal Mint, as applicable.

NAME:

DATE:

SIGNATURE: