

PERSONAL REPRESENTATIVE'S REQUEST FOR FUNDS TO COVER COSTS



PROGRESSIVE
BUILDING SOCIETY

You will need to complete a separate form for each cheque that you require

1. DECEASED SAVER'S DETAILS

Account number(s)

Title First name(s) Surname

Residential address
Postcode

Date of birth Date of death

2. PERSONAL REPRESENTATIVE(S) DETAILS

(i) Title First name(s) Surname

Residential address
Postcode

Contact telephone numbers Daytime Evening

Relationship to deceased

(ii) Title First name(s) Surname

Residential address
Postcode

Contact telephone numbers Daytime Evening

Relationship to deceased

3. PAYMENT DETAILS

Amount £ Please tick the appropriate box below:

Funeral Expenses

We will need the original invoice, cheque will be made payable to the funeral director.

Name of funeral directors

Probate Court Fees

We will need the original invoice, cheque will be made payable to **Northern Ireland Courts and Tribunals Service.**

Inheritance Tax

We will need **HMRC form IHT423**, the Inheritance Tax will be paid directly to **HMRC.**

4. INDEMNITY AND SIGNATURE – this section MUST be signed by the Person Representative(s)

I/We, the named Personal Representative(s), confirm and agree to indemnify Progressive Building Society against all claims, proceedings, damages and expenses by reason of it paying over funds standing to the credit of the deceased or acting in accordance with my/our written instructions

Signature of Personal Representative

Date

Signature of Personal Representative

Date

USE OF YOUR INFORMATION

I/We understand that the personal data disclosed by me/us as Personal Representative(s) will be retained securely by the Society until deletion of the deceased's account details, in accordance with the Society's data retention policy.

FOR BRANCH USE ONLY

Details of proof of death obtained	
Identification for Personal Representatives/Executors	
Evidence of request for funds	
Cashier's initials	
Branch code	