

Second-Named executor or equal next of kin

Title Mr Mrs Miss Ms Other title

Residential address

Surname

Forename(s)

Date of birth

Postcode

Relationship to deceased

Telephone number

If there are more than 2 additional executors or equal next of kin please add their details and signatures at the end of the form.

We are required to verify the identity of investors and beneficial owners in order to comply with UK anti-money laundering legislation. This involves obtaining independent documentary evidence confirming identity and permanent residential address. This may involve an electronic check of information. By signing this Small Estates Form you will give us the right to access such information for the purposes of the General Data Protection Regulation (GDPR). We reserve the right to request further information or documentation if required.

In the case of an estate of a deceased person in the course of administration, the beneficial owner is the executor, original or by representation, or administrator for the time being of a deceased person.

IN CONSIDERATION of you recording my/our name(s) as Personal Representative(s) of the Deceased without production of a Grant of Representation and accepting instructions from me/us and dealing with the holding in the above, I/we, do hereby agree to indemnify you and keep you indemnified from and against all losses, damages, charges, costs and expenses which you may sustain, incur or be liable to in consequence of your so doing.

Signed by executor or next of kin (First)

Signed by executor or next of kin (Second)

Date of signing

Date of signing

Witnessed by Solicitor/Commissioner of Oaths/Notary Public/Justice of the Peace (Delete as appropriate)

Witnessed by Solicitor/Commissioner of Oaths/Notary Public/Justice of the Peace (Delete as appropriate)

Full name

Full name

Signed by executor or next of kin (First)

Signed by executor or next of kin (First)

Date of signing

Date of signing



[LloydsWealth.com](https://www.LloydsWealth.com)

Please contact your Personal Wealth Adviser if you need this information in an alternative format such as Braille, large print or audio.

Calls may be monitored or recorded to meet regulatory requirements, to check we have carried out your instructions correctly and to help improve our quality of service. Not all telephone services are available 24 hours a day, 7 days a week. Please speak to your Adviser for more information. Call costs may vary depending on your service provider.

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