|  |  |
| --- | --- |
| Date  Company Name  Address 1  Address 2  Address 3  Post Code |  |

Dear Sirs,

**<NAME OF DECEASED> DECEASED**

**ADDRESS: <DECEASED’S HOME ADDRESS>**

**DATE OF DEATH: <DATE OF DEATH>**

**ACCOUNT NUMBER: <ACCOUNT NUMBER OR REFERENCE>**

I am the son of, and one of the Personal Representatives for, the above-named deceased and enclose a death certificate for registration and return.

I am at present ascertaining the amount of savings and investments my father held.

As the deceased held an account with you, I would be grateful if you could supply me with the following information regarding the deceased’s account(s):

* Value of the holding at the date of death
* Account number and type of account
* Details of any returned items, including cheques, immediately pre-or post-date of death
* Details of any existing direct debits or standing orders set up on the account. If the account is in sole name, please cancel all direct debits and standing orders. For those in joint names, I will instruct you separately regarding any changes to them
* If the account is in joint names, please provide the name and address of the joint holder
* <As the deceased had selected online only statements please forward copies of the last two months’ statements in order that I can review receipts and payments>

**Interest**

* Value of accrued but uncredited interest at the date of death
* Value of the interest gained between 6 April and the date of death: £

**Tax**

* If tax was deducted, please advise the amount or enclose the tax deduction certificate to the date of death.

Documents

* Please advise if you are holding any legal documents

Once the grant of representation is obtained, I will send it to you so that the asset can be released.

I look forward to hearing from you and thank you in advance for your co-operation. If you require any further information I can be contacted at <your email address> or <your contact number>.

Yours faithfully

**<Your Name>**

**EXECUTOR <Change this to PERSONAL REPRESENTATIVE if no will>**