

# Bereavement Notification Form

FOR USE TO NOTIFY THE BANK OF A DECEASED CUSTOMER



## Your Personal Information

We at Bank of Ireland (UK) plc (the "Bank") take your privacy seriously and we want you to be clear about how we use your personal information. We will use the information you have provided for identification purposes only in dealing with you in your role as the deceased customer's Executor(s)/ Administrator(s) or Nominated Next of Kin and the Bank will comply with the provisions of the General Data Protection Regulations ("GDPR") and the Data Protection Act 1998 as relevant. Please read our Privacy Notice which can be found at [bankofirelanduk.com/privacynotice](http://bankofirelanduk.com/privacynotice) for full details on the types of personal information we collect, how we use it and who we may share it with.

## 1. Deceased Customer Details

\* = mandatory field

Customer Name\*

Also Known As

Address\*

Alternative or Previous Address

Date of Death\*  /  /  Date of Birth\*  /  /

Main A/C Number\*  Additional Accounts

If the deceased customer held a Bank of Ireland UK Credit card please call 0345 309 8099 or write to Bank of Ireland UK Credit Card Services, RRD Leicester, PO Box 10782, Wigston, LE18 9HS

**Please Note: Bank of Ireland is not liable for any extra expenses incurred by the Estate resulting from accounts not being notified to us.**

Did the Deceased Customer make a Will?\* Yes  No  To the best of your knowledge is there another individual with the same name at the same or similar address? Yes  No

## 2. Notifying Person, Executor, Administrator or Next of Kin Details

Notifying Persons Name\*

Relationship to the Deceased  Notifying Persons Tel no

### Executor/Administrator/Next of Kin

Executor  Administrator  Next of Kin

Name

Address\*

Tel no  Tel No. For Use Only in Relation to This Notification

Is the Executor/Administrator/Next of Kin an existing Bank of Ireland customer? Yes  No

If yes, please supply a Bank of Ireland Account number\*  If no, send certified copies of proof of ID and address.

### 3. Solicitors Details

Confirm whether a Solicitor has been appointed to act in the administration of the Estate?\*

Yes  No

**If Yes we will correspond directly with Solicitors**

Firm of Solicitors\*

Solicitors Name

Solicitors Address\*

Solicitors Tel no

### 4. Additional Information

**Notes:** If there is any additional information, relevant to this case which should be communicated to the Bereavement Support Unit, please outline below

### 5. Please tick the boxes below to let us know which documentation you have attached:

	TICK HERE	Funeral Director expenses	Other funeral related expenses (e.g. florist, catering) up to £10,000	Settlement (total value of all accounts in sole name up to £30,000)	Settlement (total value of all accounts in sole name above £30,000)
Certified copy of proof of death	<input type="checkbox"/>	✓	✓	✓	✓
Certified extract of Will naming Executor(s) (if there is a will)	<input type="checkbox"/>		✓	✓	
If you are not a Bank of Ireland customer a certified copy of proof of identity and address	<input type="checkbox"/>	✓	✓	✓	✓
Our Payment Authorisation form for Funeral Director Invoices	<input type="checkbox"/>	✓			
Our Indemnity form for other funeral-related Invoices	<input type="checkbox"/>		✓		
Certified copy of Grant of Probate / Letters of Administration / Certificate of Confirmation	<input type="checkbox"/>				✓
Our Indemnity on Payment of Monies from Deceased Customer's Account form	<input type="checkbox"/>			✓	
Our Payment Authorisation form for Executors / Administrators	<input type="checkbox"/>			✓	✓

Please do not send original documentation. We are happy to accept certified copies of documentation. There may be circumstances where we request additional documentation.

Notifying Persons Signature



Date / /

Send to: Bank of Ireland UK Bereavement Unit, PO Box 2298, Belfast, BT1 9AP

**6. For Mandatory Completion at Branch – INTERNAL USE ONLY**

Notifying Branch Name\*

Staff Signature



Branch Contact Name\*

Staff No.\*

Are the Executors / Administrators / Next of Kin existing BOI customers?\*

Yes  No

If yes, please supply a Bank of Ireland Account number\*

If no, have certified copies of proof of ID and address been submitted to BSU?\*

Yes  No

**Mandatory Safekeeping Check**

Is Safekeeping still held for the deceased?\*

Yes  No

If Safekeeping held insert receipt no.

