

Closure Authority Form

Completing this form

Please fill in the form using BLOCK CAPITALS and tick any boxes which apply.

Please complete the sections of the form which apply to you based on whether you are the Solicitor instructed to act on behalf of the Personal Representative or the Personal Representative. **If you are a Solicitor, please complete the Personal Representative details on their behalf.** Any reference to "we", "our", "us" and "you" in this form shall be construed as including all signatories.

Please confirm in what capacity you are acting by ticking the box which applies:

Executor(s) of a Will Next of Kin: no valid Will exists Appointed 3rd Parties (e.g. Solicitors)

Please specify below your position in terms of Grant of Probate, Letters of Administration or Confirmation:

I am/We are applying or have applied This is not required

Where a Grant of Probate/Letters of Administration/Confirmation **is** required, we will require this form to be completed and signed by **all** those appointed.

Where a Grant of Probate/Letters of Administration/Confirmation **is not** required, we may accept this form completed and signed by **one** Executor/Next of Kin. HSBC reserves the right to request further signatures.

Details of Deceased Customer

Customer Name(s)

Customer Reference

e.g. XDECPY1234567890

Personal Representative

This section must always be completed.

Personal Representative 1

Title

Mr Mrs Ms Miss Other

Full Name

Your relationship to the deceased

Address

Postcode

Contact Number

Personal Representative 2

Title

Mr Mrs Ms Miss Other

Full Name

Your relationship to the deceased

Address

Postcode

Contact Number

Personal Representative 3

Title Mr Mrs Ms Miss Other

Full Name

Your relationship to the deceased

Address

Postcode Contact Number

Personal Representative 4

Title Mr Mrs Ms Miss Other

Full Name

Your relationship to the deceased

Address

Postcode Contact Number

Solicitors

This section is for the use of solicitors only, if appointed.

Solicitor 1

Full Name

Firm Name

Firm SRA Number

Address

Postcode Contact Number

Solicitor 2

Full Name

Firm Name

Firm SRA Number

Address

Postcode Contact Number

Fixed Rate Saver Account(s) only

I/We request that the Fixed Rate Saver Account(s) referred to below remain open until maturity.

Sort code - - Account number

Sort code - - Account number

Future Saver for Children Account(s) only

Please tick box if you consent to the following statement:

I agree that the funds in this Future Saver for Children Account are held in bare trust and will be used only for the benefit of the named child on the account.

Safe Keeping/Security

If HSBC is holding any item(s) in safe keeping for the deceased, please confirm below the instruction for the release of these items by ticking the box which applies. HSBC can only release safe keeping in the form of documentation via registered post. If the postal option is selected and the contents of the safe keeping is found to be unsuitable for posting, we will contact you to discuss next steps.

I/We will collect the safe keeping items held from the holding branch.

I/We instruct for the items held in safe keeping to be released via registered post to the correspondence address provided in this Closure Authority Form. I/We agree that HSBC will not be held responsible or be liable should the item(s) be lost in transit.

I/We give permission for the items held in safe keeping to be securely destroyed.

If HSBC is holding any security(ies) for the deceased, we will be in touch regarding next steps.

Payment and Closure instructions

Please close the deceased's account(s) and release any items in safe keeping or held as security with HSBC. I/We authorise HSBC to repay any outstanding balances held on any HSBC credit card, personal loan and/or overdraft(s) prior to the release of any final credit balances. **Please ensure the account details provided are accurate.**

Payments to a UK Bank Account

Please pay the balances to:

Name of Account Holder

Name of Bank or Building Society

Note: Payments cannot be made directly into an ISA.

Sort code - - Account number

Account Reference/
Roll No.

Payments to an International Bank Account

The transfer will be subject to regulatory checks to comply with current Legal, Compliance and Money Laundering Regulations which may delay the transfer. HSBC will let you know if it's unable to transfer the money. HSBC will use the currency exchange rate at the time of the transfer and will also require the following details:

Name of Account Holder	<input type="text"/>	
Address of Account Holder	<input type="text"/>	
Name of Bank	<input type="text"/>	
Address of Bank	<input type="text"/>	
	<input type="text"/>	
		Account No. <input type="text"/>
IBAN Code	<input type="text"/>	Swift Code <input type="text"/>
Routing code	<input type="text"/>	ABA Code <input type="text"/>
IFCS code	<input type="text"/>	BSB code <input type="text"/>
Country	<input type="text"/>	Currency Required <input type="text"/>
Account Type	<input type="text"/> (i.e. current/savings)	
Payment reference	<input type="text"/>	
Relationship to Deceased	<input type="text"/>	

Future Correspondence

(if multiple forms being completed please ensure all details are consistent) Please arrange for all future correspondence to be sent to:

Name (including title)	<input type="text"/>	
Address	<input type="text"/>	
	<input type="text"/>	
	<input type="text"/>	Postcode <input type="text"/>

Declaration

By signing this form, I/we confirm:

- The information we or any one of us provide or have provided to HSBC in the course of our dealings with HSBC in relation to the relevant deceased person's estate is correct to the best of my/our knowledge.
- That I am/we are legally entitled to administer the deceased's estate (in accordance with what is stated in the Will or the laws of intestacy if no Will exists) or I am/we are the solicitor(s) that have been appointed to act on behalf of the deceased's estate.
- HSBC may provide my/our name and address to any future claimants should they approach HSBC for information after account closure.

Where HSBC have agreed to release funds without Grant of Probate, Letters of Administration or Confirmation the following will also apply:

- That I/we accept if any other parties come forward who have a valid claim on the deceased's estate I/we will be liable to repay the monies/return items or pay the equivalent value of items released to HSBC.
- That I/we agree to be responsible to HSBC in respect of any and all losses, costs or expenses HSBC incurs in dealing with any claims or demands which may be made by or against HSBC as a consequence of HSBC paying the monies and/or claims and/or releasing any items to me/us without my/our obtaining a Grant of Probate, Letters of Administration or Confirmation if other parties lodge a valid claim.
- That I/we to the best of my/our knowledge the deceased's estate is not insolvent.
- That I/we will provide full legal authority and legal title to deal with the deceased's affairs if at any time it is requested to attach signatures of everyone who is administering the estate.
- In the circumstances, if required, HSBC may instigate legal proceedings to recover the monies paid/items released to you.

Your Signatures

Where a Grant of Probate/Letters of Administration/Confirmation **is not** required, we may accept a closure form signed by **one** Executor/Next of Kin. HSBC reserves the right to request further signatures.

Where a Grant of Probate/Letters of Administration/Confirmation is required, we will require a closure form signed by **all** those appointed.

If you are unsure about the nature of the declarations and confirmations that you are providing by virtue of signing this form, we suggest that you seek independent legal advice.

Solicitor / Personal Representative 1

Signature

Date

Solicitor / Personal Representative 2

Signature

Date

Solicitor / Personal Representative 3

Signature

Date

Solicitor / Personal Representative 4

Signature

Date

Should you have any questions about completing this form please call our Bereavement Support Team 0345 850 0088.

Please call us between 08:30 and 18:00 Monday to Friday and Saturday 09:00 to 14:00 (excluding bank holidays) or if calling from overseas, +44 (0) 114 252 0249. Textphone 03457 125563. Subject to scheduled and emergency maintenance periods. To help us continually improve our service, and interests of security, we may monitor and/or record your calls with us.

For further support please refer to our bereavement guide or the glossary of terms that can be found at [hsbc.co.uk/bereavement](https://www.hsbc.co.uk/bereavement).

Accessibility

If you need any of this information in a different format, please let us know. **This includes large print, braille, or audio.** You can speak to us using the live chat on our website, visiting one of our branches, or by giving us a call.

There are also lots of other options available to help you communicate with us. Some of these are provided by third parties who are responsible for the service. These include a Text Relay Service and a British Sign Language (BSL) Video Relay Service. To find out more please get in touch. You can also visit: [hsbc.co.uk/accessibility](https://www.hsbc.co.uk/accessibility) or: [hsbc.co.uk/contact](https://www.hsbc.co.uk/contact).

hsbc.co.uk

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Customer Information: 51 Saffron Road, Wigston, LE18 4AG.

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