

Lead Executor Notification Form



Please complete this form and provide us with the Grant of Representation or Small Estates Form. The named executor on this form will become the lead executor on the deceased myM&G holding. Any payments for this deceased holding will be paid out to the lead executor's bank account details provided below.

1 Account holder's details

myM&G account number (if known)

M	G														
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Mr Mrs Miss Ms Other

Forename(s)	Surname
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Permanent residential address of the deceased at their date of death

Postcode	Country
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2 Lead executor details

If there are multiple executors you will need to nominate a lead executor and provide their details below. We will only accept instructions regarding the deceased holdings from the lead executor.

Mr Mrs Miss Ms Other

Date of birth

D	D	M	M	Y	Y	Y	Y
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Forename(s)	Surname
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Company name (if applicable)

Permanent residential address

Postcode	Country
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Email	Phone
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Please provide us with the lead executor's bank account details in all instances so that any residual cash can be paid out.

Name and full postal address of your bank or building society

Bank or building society

Address

	Postcode
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Name(s) of account holder(s)

IBAN (if applicable)

Bank or building society account number

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Building society reference/roll number (if applicable)

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Branch sort code

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2 Lead executor details (continued)

Due to Anti-Money Laundering Regulations we will need to verify the identity of the lead executor and their bank account.

We will always try to verify the identity of the lead executor using an electronic verification system first, which checks your name and address against several databases including the electoral roll. However, if it is not possible to verify the lead executor using this method, we will ask you to provide two pieces of documentation. For full details on the documentation accepted please visit www.mymandg.co.uk/identity. Electronic verification will not be possible if you reside overseas.

To verify the bank account of lead executors we would require the following enclosed with the completed form:

- A blank cheque from the lead executor's bank account with VOID handwritten across it or a bank statement that is no more than six months old. If you would prefer to send us a bank statement, it needs to be either an original or a certified copy
- If you don't receive paper bank statements, you can provide a statement that has been printed from your online bank account or in-branch. In both cases, your bank will need to confirm that the account number, sort code and customer name (and address where shown) are correct and include the branch stamp on this for confirmation
- If payment is requested to a solicitor bank account, we will also need a signed letter from the solicitor on their company headed paper confirming their client money bank accounts details

3 Declaration

We agree to the myM&G Terms and Conditions available at www.mymandg.co.uk/pages/terms-and-conditions.

Lead executor

Date

Other named executor(s)

Date

Date

Date

! Returning your form

Please return this form and either the Grant of Representation or Small Estates Form to us at: **myM&G, 1 Tanfield, Edinburgh, EH3 5DA.**

Checklist

- Have you enclosed the Grant of Representation or Small Estates form with a copy of the will, where one exists?
- Have you completed the bank account details section?
- Have you enclosed bank account verification for the lead executor?
- Have all executors signed the form?


How to contact us

Call us

 **0808 178 4035**

We are open Monday to Friday from 08:00 to 18:00 and on Saturday from 09:00 to 13:00. For your security and to improve the quality of our service, we may record and monitor telephone calls.

Chat

 Use our online 'Chat' service to speak directly to a member of our Investor Services team.