

Small Estates Statutory Declaration and Indemnity Form



I/We (state full name)

of (state full address)

Postcode

do solemnly and sincerely declare that:

1. I am/We are the (state relationship)

of (enter deceased name)

deceased ('the deceased') who died

* (a) intestate on

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* (b) on

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leaving a Will which is not being proved

and that (I am the only person/we are the only people) entitled to administer/entitled to the estate of the deceased (delete as appropriate).

2. I/We hereby agree to indemnify M&G Securities Limited from and against all claims, demands, losses, damages, costs, charges and expenses which any such company may sustain, incur or be liable for in connection with payments due to the estate of the deceased in respect of the redemption of holdings in M&G managed funds.

The total value of the M&G holdings of the deceased in the United Kingdom, at the date of death did not exceed the sum of £36,000.

3. No inheritance tax is payable in respect of the estate of the deceased.

4. I do not intend nor, to the best of my knowledge, does any other person intend to apply for a grant of representation of the estate of the deceased.

And I make this solemn declaration conscientiously believing the same to be true and by virtue of the provisions of the Statutory Declarations Act 1835.

Signature

Date

* Please delete where appropriate

1 Witness Information

The above declaration was made at

Before me on this date

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Signature of Witness

Solicitor/Commission for Oaths/Justice of the Peace/Notary Public (Scotland) (please delete as appropriate)

Print name

Address

Postcode

Please note

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 deceased person.

! Returning your form

Please return this form along with a copy of the Will, where one exists, to us at **myM&G, 1 Tanfield, Edinburgh, EH3 5DA.**

Have you enclosed a copy of the Will, where one exists?

