



### 3 Executor or Administrator(s) (continued)

Are you a UK National only? (Please mark an X in the box)

Are you a UK National and National of one or more other countries? (tick box and list all other countries below)

Are you a National of Non-UK countries only? (tick box and list all other countries below)

Nationality 1

Nationality 2

Nationality 3

Nationality 4

Signature



Print name

Date signed

(DDMMYYYY)

Executor or Administrator 2

Title

Mr  Mrs  Ms Other:

Gender

Male  Female

Surname

First and other names in full

Address - 'Care of' and PO Box are not acceptable. Only UK addresses are eligible unless you are a Crown Employee

House number/name

Street, city, county and country

Postcode

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Nationality 1

Nationality 2

Nationality 3

Nationality 4

Signature

Print name

Date signed

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### 4 Investment options for proceeds of sale

How would you like to distribute the proceeds of the sale? (Please mark an X in one or more of the options below.)

If you do not complete any of the options we will sell the holdings and send the money to the Executor(s) or Probate Solicitor

An application form will be required for each Beneficiary

You should be aware that monies will not be invested for approximately 5 working days but may take longer.

**Inherited ISA allowance - only available to surviving Spouse / Civil Partner**

Please submit with an Inherited ISA Allowance Form

**Open a current year ISA**

Please submit with an ISA Application Form

**Invest in Investment funds**

Please submit with an Investment Funds Application Forms

**Sell the ISA holding and I would like to receive the proceeds via**  Cheque  Bank transfer

Please always complete the Settlement details section and only complete the Bank account details section if required.

### 5 Settlement details

The cheque will only be made payable to the registered Executor(s) or the Probate Solicitor's client account.

Payee name(s)

Your reference (if applicable)

**Address** - 'Care of' and PO Box are not acceptable. Only UK addresses are eligible unless you are a Crown Employee

House number/name

Street, city, county and country

Postcode



