



Fidelity Small Estates

How to fill in this form:

- For the executor(s)/administrator(s) of deceased investors.
- Only to be completed if the total value of the deceased's assets with Fidelity is less than £50,000, the deceased left a will, and Executors are not already applying for Grant of Representation as the total estate is less than the current nil rate band for inheritance tax.
- All named executors must sign this form and provide a copy of the will, certified on every page. If the deceased did not leave a will you will need to apply for probate before we can administer the deceased's account(s).
- We request you submit this form with either a redemption or a reinvestment request.
- Please use black ink and write clearly inside the boxes provided using capital letters.

- Mark your answers with a cross in the appropriate box like this:
- If you make a mistake, please correct it but don't use correction fluid.
- Any applications received that are not completed correctly may incur delays or could be returned to you.
- If you have any queries about this form please call our Customer Services Team on **0800 41 41 16**
- Applications can only be accepted using original forms. Photocopies or faxed copies cannot be accepted.

What's next?

Please send your completed application form to:

**Fidelity
PO Box 391
Tadworth KT20 9FU**

1 Estate information

Name of deceased

Title Mr Mrs Ms Other:

Their surname

Their first name

Their middle name/s

Date of death (DDMMYYYY)

Address

House number/name

Street, city, county and country

Postcode

Account number 1

Value of account at date of death

£

Account number 2

Value of account at date of death

£

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Docs

2 Executor(s) or Administrator(s) information (continued)

Address

House number/name

Street, city, county and country

 Postcode

Executor or Administrator 3

Title

 Mr Mrs Ms Other:

Gender

 Male Female

Surname

Date of birth (DDMMYYYY)

First name

Middle name/s

Address

House number/name

Street, city, county and country

 Postcode

Executor or Administrator 4

Title

 Mr Mrs Ms Other:

Gender

 Male Female

Surname

Date of birth (DDMMYYYY)

First name

Middle name/s

Address

House number/name

Street, city, county and country

 Postcode

3 Declaration and signature(s)

- "Fidelity" is with reference to "Financial Administration Services Ltd.
- I/We* named above declare that I am/we are* the Executor(s) named in the last Will of the deceased or the administrator(s) of the estate.
- I/We* attach a certified copy of the Will to be certified on every page. We can accept copies originally certified by a practicing Solicitor, Legal Executive or Independent Financial Adviser, registered with the financial conduct authority. The person providing the certification must not be related to you.
- I/We* confirm that I/we* do not intend to apply for a Grant of Representation and one has not been obtained.
- I/We* undertake to indemnify and to keep indemnified Fidelity against all demands, claims, liabilities, losses, costs and expenses whatsoever which may be incurred in consequence of any payment or transfer made.
- I/We* make this solemn declaration conscientiously believing the same to be true by virtue of the Statutory Declarations Act 1835.

*delete as appropriate

Signature(s) of all Executor(s)/Administrator(s) (you must sign here)

Please ensure all relevant sections are completed as per the instructions on this form

Signature of executor/administrator 1



Print name

Signature of executor/administrator 2



Print name

Signature of executor/administrator 3



Print name

Signature of executor/administrator 4



Print name

