

Death of a holder of NS&I savings

- Please use this form to: tell us of the saver's death, give details of their NS&I savings, give the facts to prove who is entitled to claim the savings, and show whether the money is to be kept in NS&I or is to be repaid.

IMPORTANT INFORMATION – please read before completing this form.

- We will let you know if we need a Grant of Representation (also known as Grant of Probate) once we receive your completed form. This will be needed if the total of the customer's NS&I savings is £5,000 or more.
- The Director of Savings reserves the right to request a Grant of Representation for a claim of any value.
- We may also contact you for more information before the savings can be released.

A guide to help you through the claims process is available at nsandi.com/help-to-claim. You can also call us any time on **08085 007 007** or tweet us **@nsandihelp** and we'll be happy to help. We're here in the UK all day, every day. Calls from the UK are free. We may record your call to help us give you the best service.

How to claim

Were the savings held Jointly or in Trust ?	Yes ▶	The surviving holder(s) should complete sections 1, 2 and 6 . Please send us the death certificate (not a photocopy).
No ▼		
Prior to May 1981 there was a scheme for savers to nominate someone to receive their savings. Did the saver complete a National Savings Nomination Form?	Yes ▶	The nominated person should complete sections 1, 2 and 6 . Please send us the Nomination Form if you have it and the death certificate (not a photocopy).
No ▼		
Did the saver make a Will ?	Yes ▶	The Executor should complete sections 1, 2, 3 and 6 . If a Grant of Representation or (<i>in Scotland</i>) Confirmation of Executor Nominate is being obtained please send this when available. If a Grant is not being obtained send us the death certificate (not a photocopy) and the Will or a photocopy of the Will certified by a solicitor . If you send the original Will you may wish to use registered post.
No ▼		
Is a Grant of Letters of Administration or (<i>in Scotland</i>) Confirmation of Executor Dative being obtained?	Yes ▶	The person administering the estate should claim by completing sections 1, 2, 4 and 6 , sending the Grant of Letters of Administration or Confirmation of Executor Dative when available.
No ▼		
No ▼		<p>A relative or other person should claim according to this order of priority:</p> <ol style="list-style-type: none"> 1. Widow/Widower or surviving civil partner 2. Children 3. Parent(s) 4. Brother/Sister 5. Other relative or entitled person <p style="text-align: right; margin-right: 20px;">} Equally entitled in Scotland</p>
No ▼		<p>Please complete sections 1, 2, 4, the parts of section 5 appropriate to your claim, and section 6.</p> <p>Please also send us the death certificate (not a photocopy).</p>

IMPORTANT - please read
 Any claim for **Government Stocks (Gilts)** formerly held on the National Savings Stock Register should be made directly to: British Government Stocks (Gilts), Computershare Investor Services PLC, The Pavilions, Bridgwater Road, Bristol, BS99 6ZW. Call **0370 703 0143** (Monday to Friday between 9am and 5pm). Calls are charged at the same rate as any 01 or 02 call from any UK network, mobile or landline.
 Email gilts@computershare.co.uk.
 Website www-uk.computershare.com/investor/gilts

● Please use CAPITAL letters and where required.

● Complete sections 1 and 2 in all cases and other sections as applicable.

1 Personal details of deceased saver

M _____ Saver's surname _____
(Mr Mrs Miss Ms)
 All forenames _____

Address _____

_____ Postcode

Age (or date of birth if known) _____ National Insurance Number

Date of death _____ Place of death _____

2 Details of all the saver's NS&I savings (please send Passbooks, Bonds, Certificates if available)

Are any of the savings held jointly or in trust? Yes <input type="checkbox"/> (<i>joint</i>) Yes <input type="checkbox"/> (<i>trust</i>) No <input type="checkbox"/>	Please enter the details of each product held - as shown on the bank book(s), Bond(s) or Certificate(s).
65+ Guaranteed Growth Bonds (NS&I/customer number or any Bond number)	
Children's Bonus Bonds/Children's Bonds (NS&I/customer/holder's number)	
Direct ISA, Cash ISA or TESSA-only ISA (NS&I/account number(s))	
Direct Saver (NS&I/account number)	
Fixed Interest Savings Certificates (NS&I/customer/holder's number)	
Guaranteed Growth Bonds (NS&I/customer number or any Bond number)	
Guaranteed Income Bonds (NS&I/customer number or any Bond number)	
Income Bonds (NS&I/customer/account number)	
Index-linked Savings Certificates (NS&I/customer/holder's number)	
Investment Account (account number)	
Investment Guaranteed Growth Bonds (NS&I/customer number or any Bond number)	
Premium Bonds (NS&I/holder's number or any Bond number)	
<i>If any other NS&I savings are held but not listed above, please give the description and any reference number(s).</i>	
Are any of these savings covered by a Nomination ? Please note that this does not apply to Premium Bonds, Easy Access Savings Accounts or Individual Savings Accounts (ISAs) which could not be nominated.	Yes <input type="checkbox"/> No <input type="checkbox"/>

Is there a Will? If **Yes** complete section 3, if **No** complete section 4.

3 To be completed if there is a Will

Please give the full name(s) of the Executor(s) as shown on the Will or Grant/Confirmation.

Is a Grant of Probate or (*in Scotland*) Confirmation of Executor Nominate being obtained? Yes No

Has the Grant or Confirmation already been received? Yes No

Please go to section 6.

4 To be completed if there is no Will

Is a Grant of Letters of Administration or (*in Scotland*) Confirmation of Executor Dative being obtained?

Yes No

If Yes, please give full name(s) of the Administrator(s) or Executor(s).

Has the Grant or Confirmation already been received?

Yes No

If a Grant or Confirmation is being obtained please go to section 6, if you are not obtaining one go to section 5.

5 To be completed if you are not obtaining a Grant or Confirmation

(a) Was a husband, wife or civil partner living when the saver died? Yes No

If Yes, please give the widow(er)'s or surviving civil partner's full name and go to section 6.

If No, answer questions (b) and (c).

(b) Were any children living when the saver died? Yes No If Yes, please give full name(s).

Saver's child/children*	Age(s)	Saver's child/children*	Age(s)

(c) Were there any other children who died before the saver but left children of their own? Yes No If Yes, please give full name(s).

Saver's deceased child/children*	Saver's grandchild/grandchildren*	Age(s) of grandchildren

If you have answered Yes to question (b) or (c), go on to section 6. If not, answer questions (d) to (g).

(d) Was the father living when the saver died? Yes No

If Yes, give the father's full name.

(e) Was the mother living when the saver died? Yes No

If Yes, give the mother's full name.

(f) Were any brothers or sisters living when the saver died? Yes No If Yes, please give full name(s).

Saver's brother(s)/sister(s)*	Age(s)	Saver's brother(s)/sister(s)*	Age(s)

(g) Were there any other brothers or sisters who died before the saver but left children of their own? Yes No If Yes, please give full name(s).

Saver's deceased brother(s)/sister(s)*	Brother's/sister's child/children*	Age(s) of children

***Note: Please include the names of any who are legitimated, legally adopted or illegitimate.**

6 To be completed in all cases

If you are claiming as next of kin, please say how you are related to the saver? (*husband, sister, etc.*)

If you are not claiming as next of kin, in what capacity are you claiming? (*Executor, Nominated Person, Administrator, Trustee etc.*)

Please give your age if under 18.

65+ Guaranteed Growth Bonds can only be transferred to someone aged 65 or over. Children's Bonus Bonds, Children's Bonds, Individual Savings Accounts and Premium Bonds cannot be transferred. However, if not repaid, Premium Bonds can remain in each prize draw for up to 12 months after the date of death of the holder.

If your claim is accepted do you wish

to keep the money in NS&I?

Yes No

Type of savings required

If *Yes* state the type of savings you require.

If *No* give the name of the person to whom it is to be paid.

Where we should send money

How should we send the money

Warrant

BACS

Please remember to complete all account details here, as we will send the payment direct to your account.

Sort Code

Account Number

Payee Name

Roll No

Please be careful when providing your bank details. If you enter the wrong details your payment might be delayed, or credited to the wrong account, and may result in a financial loss.

Premium Bonds to remain in each prize draw for up to 12 months after the date of death?

Yes

Please still send the Bonds. The numbers will continue to take part in all relevant prize draws.

No

Note: We will send you a valuation and any forms if required. Payment will be sent to the first address shown below unless you tell us otherwise.

Please read the following statement, complete your details and sign.

I/We believe that the information given by me/us on this form is true and that I am/we are entitled to claim the NS&I savings of the person named in section 1. (*Please use CAPITAL letters for name(s) and address(es).*)

M _____ Surname _____ (<i>Mr Mrs Miss Ms</i>) All forenames _____
Address _____ _____
Postcode <input type="text"/>
Nationality _____
Telephone numbers, including STD codes (<i>in case we need to contact you</i>)
Daytime _____
Evening _____
Signature _____
Date _____

M _____ Surname _____ (<i>Mr Mrs Miss Ms</i>) All forenames _____
Address _____ _____
Postcode <input type="text"/>
Nationality _____
Telephone numbers, including STD codes (<i>in case we need to contact you</i>)
Daytime _____
Evening _____
Signature _____
Date _____

IMPORTANT – HAVE YOU ENCLOSED

- The documents asked for on page 1.
- **Passbooks, Bonds, Certificates** - We can deal with your claim more quickly if you send these documents with this form.
- **Easy Access Savings Account** cash cards should **not** be returned, these should be destroyed.

Please ensure you keep a record of the account and/or Bond numbers for future enquiries.

Where to send the form

When you have filled in the form, please send it with the above documents to National Savings and Investments, Glasgow, G58 1SB.