

## When an NS&I customer dies



It's easier and faster to let us know online, simply scan this QR code or go to [nsandi.com/WNCD](https://nsandi.com/WNCD)

Please use this form to give details of the deceased customer's NS&I savings, so that we can pay them to the person who's entitled to receive the money.

We will let you know if we need a Grant of Representation (also known as a Grant of Probate or Grant of Letters of Administration) once we receive your completed form. We may ask for this if the customer's total NS&I savings are £5,000 or over. The Director of Savings also reserves the right to request a Grant of Representation for savings of any value.

### Who should claim and how

Were the savings held **Jointly** or in **Trust**?

No

Yes ►

The surviving holder or trustee(s) should complete sections **1, 2, 5 and 6**.

Did the customer make a **Will**?

No

Yes ►

The Executor should complete sections **1, 2, 3, 5 and 6**.

Has a **Grant of Letters of Administration** or (in Scotland) **Confirmation of Executor Dative** been obtained or is one being obtained?

No

Yes ►

The person appointed or being appointed to administer the customer's estate should complete sections **1, 2, 4, 5 and 6**.

A relative or other person should claim according to this order of priority:

1. Widow/Widower or surviving civil partner
2. Children
3. Parent(s)
4. Brother/Sister } Equally entitled in Scotland
5. Other relative or entitled person

This person should complete sections **1, 2, 5 and 6**.

Please go to the next page ►

### Any Questions?

If you need any help, call us on **08085 007 007**. Calls from the UK are free. We may record your call to help us give you the best service. You can also talk to us through our web chat service at [nsandi.com](https://nsandi.com) from 7am to 10pm Monday to Friday and 8am to 8pm at the weekends.

## 1 The customer's personal details

Title _____	Surname _____
All forenames _____	
Address _____	Postcode <span style="border: 1px solid black; padding: 2px;">  </span>
Previous address (If they had lived at the address above for less than three years)	Previous postcode <span style="border: 1px solid black; padding: 2px;">  </span>
Date of birth (or age if not known) _____	National Insurance Number <span style="border: 1px solid black; padding: 2px;">  </span>
Date of death <span style="border: 1px solid black; padding: 2px;">D</span> <span style="border: 1px solid black; padding: 2px;">D</span> <span style="border: 1px solid black; padding: 2px;">M</span> <span style="border: 1px solid black; padding: 2px;">M</span> <span style="border: 1px solid black; padding: 2px;">Y</span>	Place of death _____
Was a husband, wife or civil partner living when the customer died?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If Yes, please give their full name _____	

## 2 The customer's NS&I savings

Are any of the savings held jointly or in trust?		Please tick below if the customer had any of the accounts listed and give the account number(s) if available. You can find these on passbook(s), Bond(s), Certificate(s) or other records.	
Yes <input type="checkbox"/> (joint)	Yes <input type="checkbox"/> (trust)	No <input type="checkbox"/>	<input checked="" type="checkbox"/> Account number
<b>Children's Bonds</b>			
<b>Direct ISA, Junior ISA, Cash ISA or TESSA-only ISA</b>			
<b>Direct Saver</b>			
<b>Fixed Interest Savings Certificates</b>			
<b>Green Savings Bonds</b>			
<b>Guaranteed Growth Bonds</b>			
<b>Guaranteed Income Bonds</b>			
<b>Income Bonds</b>			
<b>Index-linked Savings Certificates</b>			
<b>Investment Account</b>			
<b>Premium Bonds</b>			
<i>If any other NS&amp;I savings are held but not listed above, please give the details and any reference number(s).</i>			

### **3 Complete if there is a Will. If not, please complete section 4**

Please give the full name(s) of the Executor(s) as shown on the Will.

Do you have or are you obtaining a Grant of Probate or (in Scotland) a Confirmation of Executor Nominate? Yes  No   
Please go to section 5.

### **4 Complete if there is no Will.**

Do you have or are you obtaining a Grant of Letters of Administration or (in Scotland) a Confirmation of Executor Dative? Yes  No

If you have or are obtaining a Grant or Confirmation, please give the full name(s) of the Administrator(s) or (in Scotland) Executor Dative(s).

If you have or are obtaining a Grant or Confirmation, please go to section 5.

### **5 Please read and complete in all cases.**

**5a Joint accounts** - If an account was held jointly, it will now be held in the sole name of the remaining holder. However if you want to close such an account, please give the account number(s) below.

**5b Premium Bonds** - If the customer had any Premium Bonds, please complete this section. Otherwise go to section **5c**. Their Premium Bonds can take part in the prize draws for up to 12 months after the date of death, or be repaid as soon as we've processed your form.

Do you want the Bonds to remain in the prize draws? Yes

No

We will hold on to any outstanding prizes and pay them when we release the savings. If you keep the Bonds in the draw after that, we'll pay any prizes to the person entitled to them.

### **5c Where you want us to pay the money**

Please provide details of the bank account you want the money to be paid to.

Bank/building society

Name in which account is held

Account number  Sort code  -  -

Bank reference or building society roll no (if applicable)

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

## 6 Your details and signature(s)

Please read the statement below, complete your details and sign. We will only contact the person in the first box shown below unless you tell us otherwise.

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.

Title _____	Surname _____
All forenames _____	
Age, if under 18 _____	
Address _____ _____	
Postcode	_____
Nationality _____	
Phone number _____ <small>(Please give the one we are most likely to reach you on.)</small>	
If you are claiming as next of kin, how you are related to the customer? (Widow/widower, parent, child, brother etc)	
If you are not the next of kin, in what capacity are you claiming? (Executor, Nominated Person, Administrator, Trustee etc) _____ _____	
Signature _____	
Date	DDMMYY

Title _____	Surname _____
All forenames _____	
Age, if under 18 _____	
Address _____ _____	
Postcode	_____
Nationality _____	
Phone number _____ <small>(Please give the one we are most likely to reach you on.)</small>	
If you are claiming as next of kin, how you are related to the customer? (Widow/widower, parent, child, brother etc)	
If you are not the next of kin, in what capacity are you claiming? (Executor, Nominated Person, Administrator, Trustee etc) _____ _____	
Signature _____	
Date	DDMMYY

## How we use your information

We treat all the information you give us about you and others as private and confidential.

See our privacy notice for full details - available at [nsandi.com/privacy-notice](https://nsandi.com/privacy-notice) or by calling us.

## What to do next

Please send your completed form to **NS&I, Sunderland SR43 2SB**.

## What happens when we receive your form

- We'll get back to you within seven working days
- We'll let you know if we need any more information or documents, such as the Will, or a Grant of Representation (also known as a Grant of Probate or Grant of Letters of Administration).

## Did the customer hold Government Stock (Gilts)

If the customer held Government Stocks (Gilts) formerly held on the National Savings Stock Register, you'll need to contact 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](mailto:gilts@computershare.co.uk)

Website [www-uk.computershare.com/investor/gilts](http://www-uk.computershare.com/investor/gilts)