

For all sole accounts where the total balance is £30,000.01 or more.

- We'll need a copy of the Grant of Probate, or Letters of Administration; this can be an original or a photocopy. The next of kin can apply for these from the Probate Registry. For help contact the Probate Registry on 0300 123 1072 or you may like to seek legal advice.
- Return the form to us, with Identification (ID) – please see page 2 for more information about ID. This is not required for any executor/administrator who is an existing customer of the Society.

SECTION 1 - INFORMATION ABOUT THE DECEASED

Title	<input type="text"/>	Forename(s)	<input type="text"/>
Surname	<input type="text"/>	Date of Death	<input type="text"/>
Residential Address & Postcode	<input type="text"/>		
Account numbers for Yorkshire Building Society accounts held	Account Number(s) <input type="text"/>		

SECTION 2 – EXECUTORS/ADMINISTRATORS DETAILS

Title	<input type="text"/>	Title	<input type="text"/>
Forename(s)	<input type="text"/>	Forename(s)	<input type="text"/>
Surname	<input type="text"/>	Surname	<input type="text"/>
Address & Postcode	<input type="text"/>	Address & Postcode	<input type="text"/>
Telephone number	<input type="text"/>	Telephone number	<input type="text"/>
Date of Birth	<input type="text"/>	Date of Birth	<input type="text"/>
Title	<input type="text"/>	Title	<input type="text"/>
Forename(s)	<input type="text"/>	Forename(s)	<input type="text"/>
Surname	<input type="text"/>	Surname	<input type="text"/>
Address & Postcode	<input type="text"/>	Address & Postcode	<input type="text"/>
Telephone number	<input type="text"/>	Telephone number	<input type="text"/>
Date of Birth	<input type="text"/>	Date of Birth	<input type="text"/>

SECTION 3 – CLOSURE OF ACCOUNTS AND KEEPING FIXED RATE BONDS OPEN

A Closing the accounts

Please note we are unable to transfer funds from any of the deceased's accounts via the Faster Payments service.

- i If you'd like a cheque, insert the name of who it's to be made payable in the box below

Payee

Send to

- ii Or complete the box below with the account number of another Yorkshire Building Society account to transfer the money to.

B Keeping fixed rate bonds open

To keep fixed rate bonds open until maturity mark **X** in this box Fixed rate ISAs must be closed

All the Executors or Administrators named on the Grant of Probate or Letters of Administration will need to sign this section.

Signature of all Executor's or Administrator's:

Date

IDENTIFICATION

Here is a list of the types of documents we accept as proof of your name and identity. We need to see one piece of identification from the following list for each executor or administrator (this is not needed if you are an existing customer of the Society). This can be an original or a copy.

- Current signed passport (UK or foreign)
- Current EU or UK photo card Driving Licence (full/provisional) or full UK Driving Licence (old style)
- Current EU member state ID card
- Current Residence permit issued by the Home Office to EU National
- Current Armed forces ID card
- HMRC (Inland Revenue) coding/assessment/statement/tax credit letter issued in the last 12 months (not a P45 or P60)
- Current firearms certificate
- Original notification letter from Department for Work and Pensions (DWP), Pension Service
- Job Centre Plus or Local Authority confirming rights to benefits issued in the last 12 months
- Current signed employers photo ID card
- Current Foreign National ID card
- Current disabled person's blue badge

If you're sending any ID with a photo or signature through the post then you should send copies and not the originals.

HOW WE USE YOUR PERSONAL INFORMATION

Yorkshire Building Society decides what personal information we need to collect about you, how we use it, who we share it with and how long we keep it. This makes us the data controller of your personal information for data protection purposes.

We will use the personal information obtained from you and additional information obtained in the course of opening and managing your account. This includes, but is not limited to, name, address, identification, account transactions and communications and where relevant sensitive information, credit reference data, financial crime data, health details, nationality and legal proceedings. We will respect your rights to privacy and will only collect, use, store and share your personal information where a lawful purpose applies:

- It's necessary for the performance of a contract you have or have requested to enter into.
- If we have a legal obligation.
- If we have a legitimate business interest where it does not have an unfair impact on you.
- If you have given your consent where the collection, use, storage or sharing involves special category (sensitive) personal information (e.g. health, race and religion).
- Where we believe you or another person is at risk and we need to protect your or their vital interest.
- Where it's in the public interest or we have been given official authority to do so.

For full details of the types of information used in each product, and the other lawful purposes we may use it for, please see our "How we use your personal information" booklet which can be found at www.ybs.co.uk or by visiting one of our YBS branches or Agencies. When you apply for an account we will use your personal information together with other information available (including relevant sensitive information, (e.g. health, race and religion) for:

- Identity verification (including checking documents with issuing authorities e.g. driving licence – DVLA).
- Processing your application.
- Contacting you where necessary.
- Fraud prevention and detection.
- Administering your account.
- Legal and regulatory compliance.
- Marketing (where we have your consent) and market research.
- General business purposes.

We will only use, keep and share your personal information as required to meet our legal and regulatory obligations or to deal with your enquiry, administer, and manage your accounts, products and relationship with us. After this time, we will delete your personal information in line with the requirements of the Financial Conduct Authority, Prudential Regulation Authority, Money Laundering regulations, Financial Ombudsman Service, HMRC and any other regulatory bodies.

We may disclose your personal information with other people or organisation as follows:

- With Yorkshire Building Society and its subsidiary companies for fraud prevention, lawful purposes, account administration and for general business purposes (e.g. updating customer records, handling customer queries and complaints).
- Personal information to (i) our external auditors and regulatory bodies including the Financial Ombudsman Service, Prudential Regulation Authority and the Financial Conduct Authority, and (ii) associate companies, agents and service providers including solicitors and valuers acting for the Society, field agents, debt recovery agents, tracing agents, letting agents, brokers, printers, market research agencies and providers of information technology services.
- If we sell or transfer all or part of our business, we may share or transfer our customer records as part of the proposed/actual sale or transfer. However, we will only do so under a contract or where we have a legal obligation to do so. The protection, security and confidentiality of your personal information are important to us and we put in place appropriate safeguards to manage this.

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YOUR RIGHTS UNDER DATA PROTECTION LAWS

You have the right to:

- Be informed about processing of your personal information.
- Have your personal information corrected if it is inaccurate or incomplete.
- Object or restrict to the processing of your personal information.
- Have your personal information erased subject to conditions (e.g. where the processing fails to satisfy legal requirements).
- Request access to your personal information and details about how we process it.
- Move, copy or transfer your personal information also known as 'data portability'.
- Challenge automated decision making including profiling, which is the automated Processing of your personal information to evaluate certain things about you.
- Complain to the Information Commissioner's Office (<https://ico.org.uk/>) which enforces data protection laws.

For more information please see our 'How We Use Your Personal Information' and 'Your Rights and Data Protection' booklets. Our 'How We Use Your Personal Information' booklet explains what personal information we need to collect, why we need it, where we may obtain information from and how long we keep it for. Our 'Your rights and Data Protection' Booklet provides more information on data protection laws, our legal obligation and your individual rights in relation to the processing of your personal information. To obtain a copy of these booklets, or if you wish to invoke any of the rights listed above, simply visit our website www.ybs.co.uk or alternatively call us on 0345 1 200 100 or visit us in branch or agency. If you want to see what personal information we hold about you, you can request a copy of this by completing a Subject Access request form. This form can be found on our website www.ybs.co.uk.

Our Data Protection Officer (DPO) provides help and guidance to make sure we apply the best standards to protecting your personal information. You can contact the DPO by writing to:

- ✉ Data Protection Officer, Yorkshire House, Yorkshire Drive, Bradford, BD5 8LJ
- 📧 Or by emailing: dpo@ybs.co.uk

WE'RE HERE TO HELP

🌐 **VISIT YBS.CO.UK**

📞 **CALL 0345 1669 229**

🏠 **VISIT YOUR NEAREST BRANCH**

✉ **WRITE TO US AT:**

Bereavement Team
Customer Service Centre
Yorkshire Building Society
Yorkshire House
Yorkshire Drive
Bradford BD5 8LJ

Our printed material is available in alternative formats e.g. large print, Braille or audio. Please visit us in branch or call us on **0345 1200 100.**

Yorkshire Building Society is a member of the Building Societies Association and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Yorkshire Building Society is entered in the Financial Services Register and its registration number is 106085. Head Office: Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ. All communications with us may be monitored/recorded to improve the quality of our service and for your protection and security. Calls to 03 numbers are charged at the same standard rate as 01 or 02 landline numbers, even when calling from a mobile.