

Tell us about a bereavement

We're sorry to hear you've suffered a loss. If you just need an account balance, you don't need to complete this form. You can notify us by phone or post, and then send us an original or certified copy of the death certificate.

Complete this form in **block capitals** when you are ready to settle the account(s) the deceased had with Goldman Sachs International Bank under the Marcus or Saga Savings brand.

What you need to send to settle the account(s):

- Original or certified death certificate
- Bereavement form

We'll also need to see a Grant of Probate, also known as Confirmation in Scotland, or Letters of Administration to settle the account(s) if:

- The account(s) balance is £20,000 or more
- The account(s) balance is £50,000 or more and you're using a solicitor

If the Grant of Probate lists multiple executors, they will all need to sign this form.

We will not need to see a Grant of Probate if:

- The linked account is still open and accepting funds
- You have a joint account and request we convert to a sole account in your name

Where to post:

Marcus UK, PO Box 74787, London, EC4P 4JG

Section 1: Notification of bereavement

Please add the personal details of the deceased customer. We'll also check if the deceased held any other Marcus accounts or any Saga Savings accounts provided by Goldman Sachs International Bank.

Name of account holder:	
Address:	
Date of Birth:	
Sort code:	Account number:
Sort code:	Account number:
Sort code:	Account number:

Section 2: Closing the sole accounts

Once we've verified the documents you provide, our standard procedure is to close all sole account(s) held by the deceased and return any money to the relevant linked account.

The linked account would be a current account in the deceased's name used to make all payments into and out of their account(s) with us.

Please confirm what you'd like us to do in relation to all sole account(s) held by the deceased:

Close all sole accounts (including any Cash ISA held) and transfer the money back to the deceased's linked account. *Please only select this if the linked account is still open.*

Raise a cheque to the personal representative or executor named below:
Payee Name _____

You'd also like us to release money for additional expenses such as Inheritance Tax or Funeral Costs and/or request more information about the deceased's accounts and/or the available options before you give instructions. We'll contact you if you select this option.

Convert the joint account to a sole account, to be in the other joint account holder's name.

Section 3: Joint account holders

If you held a joint account with the person who has died, that account will be automatically frozen when you call to tell us about the death. You can ask for the freeze to be removed if you need to access your account. Once we've received the documents we need to see, we'll change the account into your sole name, or you can choose to close it. We'll email you when this is completed.

Section 4: If you're using a solicitor

If you have appointed a solicitor to act on your behalf who may contact us in relation to the deceased customer's account(s), please provide their details. Otherwise, you can leave this blank.

Please direct all correspondence to this solicitor only.

Solicitor name:
Company name:
Contact number:
Solicitor signature:
Company name:
Company address:

Section 5: Role and representatives

Select the option that applies to you as a personal representative:

Next of Kin and/or executor

3rd party (e.g Solicitors)

Section 6: Personal data, declaration and signatures

Personal data

Any personal data provided on this form will be used in line with our privacy policy, which is available on our website at sagasavings.co.uk/privacy-policy. If the deceased customer also had a Marcus account, we'll also use the personal data provided on this form in line with the Marcus privacy policy, available at marcus.co.uk/privacy-policy.

Declaration

Please read the declaration and sign on the last page. By signing, you confirm you agree with the settlement option chosen in section 2.

I confirm and agree that:

- I am the deceased's personal representative/next of kin or acting on behalf of the personal representative or next of kin.
- I am entitled, either solely or with others, to provide instructions in relation to the balance(s) in any sole accounts the deceased customer held with Goldman Sachs International Bank under the Marcus or Saga Savings brand.
- Where anyone else is entitled to a share of this money, I confirm that I have their consent to make decisions about the estate, including (but not limited to) how the estate is settled.
- I will be responsible for any losses or costs that Goldman Sachs International Bank suffers as a result of any other person being entitled to a share of the money that Goldman Sachs International Bank pays in accordance with this instruction form or in accordance with subsequent instructions given by me.
- To the best of my knowledge the deceased's estate is not insolvent.
- Where applicable, the primary contact named on page 4, is authorised by each of the personal representatives to provide further instructions in relation to the deceased's accounts on our behalf if necessary. We are not aware of any limit on our ability to authorise the primary contact in this way.
- If I have authorised the closure of sole accounts held by the deceased in section 2, I understand that this covers all sole accounts held by the deceased with Goldman Sachs International Bank under the Marcus or Saga Savings brand, even if I have not listed them on this form.

If there are multiple personal representatives or multiple executors on the Grant of Probate, all must review and sign this declaration.

Representative 1

Treat this person as the primary contact

Name:
Address:
Email address:
Phone number:
Relationship to deceased:
Date of birth:
Date:
Signature:

Representative 2

Treat this person as the primary contact

Name:
Address:
Email address:
Phone number:
Relationship to deceased:
Date of birth:
Date:
Signature:

Representative 3

Treat this person as the primary contact

Name:
Address:
Email address:
Phone number:
Relationship to deceased:
Date of birth:
Date:
Signature:

Representative 4

Treat this person as the primary contact

Name:
Address:
Email address:
Phone number:
Relationship to deceased:
Date of birth:
Date:
Signature: