

Death claim Declaration

Completing the form

This form should be signed by the beneficiary for pension account(s) and the executor for all other account(s). If anyone forgets to add a date to their signature, we'll treat the day we receive this form as the signing date.

This form should be used to request settlement of a client's account(s) after death. Please read important notes section before completing. If you've any questions, please don't hesitate to contact our client relations team.

Returning the form

Please return the completed form via Jira messaging or by post to:



Nucleus
PO Box 26968
Glasgow
G2 9DY

Signing the form

We can only accept a handwritten signature, in ink.



If anyone forgets to add a date to their signature, we'll treat the day we receive this form as the signing date.

If you have any questions please contact our client relations team on 0131 223 9535, or by email on client.relations@nucleusfinancial.com.

Additional Support

We recognise that personal circumstances, life altering events, or health issues could mean that you need some extra support. If there is anything we can do to help make dealing with us easier, please speak to one of our team and we'll work with you to put the right help in place. For more information on the types of support we can offer, visit nucleusfinancial.com/supporting-customers.

For personal support around grief and bereavement, you can reach out to Cruse Bereavement Support. They provide expert bereavement and grief support. You can visit their [website](#) or call their Cruse helpline on 0808 808 1677.



We aren't authorised to provide financial advice, so we can't provide you with any recommendations or guidance on drawdown.

If you need help understanding drawdown, please speak to an authorised adviser.

Deceased client details

Name

Nucleus account number(s)

Payment details

Proceeds to be paid to nominated bank account (detailed below)

Account number

When you select this option, if the account(s) is/are not already in cash we will accept this as your trade instruction and arrange for all assets held to be sold in order to facilitate this payment request.

Sort code

Payee name

Bank/building society name

Proceeds to be transferred to existing Nucleus account(s) (list below)

Client name

Wrapper

Account number

N

N

N



Important note

To assist with completing this claim form:

- Please note that the payment of pension death benefits is made at the discretion of the Scheme Administrator who will choose the beneficiaries entitled to pension death benefits. Consideration will be given to any expression of wishes held on file for the deceased and any other relevant factors of which we are made aware. Pension monies do not form part of the estate of the deceased so may not necessarily go to an Executor.
- A Grant of Probate/Confirmation (certified copy of original sealed document) is required in most cases and payment cannot be made until this has been received. For Pension accounts please provide a certified copy of the Last Will, where available. The application for Probate can take some time to complete, please bear this in mind when making arrangements.
- Please ensure the correct person(s) is signing this form: where a Pension/Drawdown account is held, this form should be signed by the chosen beneficiary/beneficiaries. For all other account types it should be signed by the Executor
- Where there are multiple executors, this form should be signed by all.
- If you are transferring cash or assets as a result of an inherited Isa allowance, please ensure you also complete and submit form [0270 Declaration – Additional permitted subscription](#), to ensure there are no delays in processing your instruction.

Death claim Declaration



First claimant

Print name

Date of birth

Address (including postcode)

Signed

Date

Third claimant (if applicable)

Print name

Date of birth

Address (including postcode)

Signed

Date

Second claimant (if applicable)

Print name

Date of birth

Address (including postcode)

Signed

Date

Declaration

Please note that in signing this form all claimants are accepting the following declarations:

- I/We hereby make application for the payment of the monies due under the account(s) numbered above.
- To the best of my/our knowledge and belief, the information provided in this form is correct, and I/we authorise payment to be made to the named payee.
- I/We agree that any payment made by Nucleus shall be in full and final settlement of my/our claim on the accounts numbered above.
- I/We understand that making a false claim, or supplying false information, could leave me/us liable to legal action.

If you are claiming without supplying the original Account Document(s), please confirm your acceptance of the following statement by ticking where appropriate:

I/We declare that I/we have been unable to find the Account Document(s).

I/We confirm that the account has not been deposited or assigned in security for a loan.

I/we agree to be responsible for any claims made against Nucleus resulting from Nucleus relying on my/our instructions in this form, and for any costs or expenses that arise as a result of such claims.

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0131 226 9535, or via the Typetalk service on 18001 0131 226 9535.



0131 226 9535



client.relations@nucleusfinancial.com



www.nucleusfinancial.com