

{%=buildsoc.orgName%}

{%=buildsoc.orgAddress%}

Our ref: {%=reference%}

Date: {%=date%}

Reply to: **TORQUAY** office

Tel.: **01803 313656**

Dear Sirs

**Re: The Estate of the Late: {%=deceased.forename%} {%=deceased.surname%}**

**Date of death: {%=deceased.dateOfDeath%}**

**Accounts:**

{%for a in buildsoc.accounts%}Roll no. {%=a.rollNumber%}

{%if a.jointCheck%} - Joint account with: {%=a.jointInfo%}{%end%}

{%end%}

We have been instructed to act in the administration of the Estate of the above named deceased who died on the above date and we enclose a Death Certificate Verification Form for your noting and return.

We would be grateful if you could please supply us with the following in relation to all accounts held by the deceased:

* Confirm the balance of the accounts, together with any interest accrued but not yet credited, as at the date of death.
* Details of interest accrued as at the date of death.
* Confirm the balance and details of any other accounts or investments that the deceased may have held either in their sole name or jointly with any other person.
* Transfer any balance to an account that pays the highest rate of interest for repayment without notice. A tax deduction certificate for the year period 6 April to the date of death would also be useful if appropriate.
* Supply a list of all direct debits/standing orders relating to the above accounts and let us have a copy of the last statement relating to the accounts or a copy of the most recent transactions on the accounts.
* Confirmation as to whether you participate in the Inland Revenue direct payment scheme relating to Inheritance Tax.
* Whether you hold any Title Deeds, original or copy Wills, Stocks and Securities or other documents in safe custody on behalf of the deceased.
* If applicable, provide details of Home Insurance held.

When replying please let us have the appropriate withdrawal forms.

Would you please also ensure that you forward all future correspondence to this office quoting our reference at all times.

We look forward to hearing from you and thank you in anticipation of your response.

Yours faithfully

**Darby and Darby**

ben@darbylaw.co.uk

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