



HERITAGE PENSIONS

DEATH CLAIM AND NOTIFICATION FORM

PLEASE RETURN THIS FORM TO:

Heritage Pensions Limited
6 Doolittle Mill
Froghall Road
Amphill
Bedfordshire
MK45 2ND

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1 Notification of Deceased Member

Deceased Member details

SIPP reference number

Title Mr Mrs Miss Ms Other

Name

Date of birth

National insurance number

Date of death

Marital status Single Married Civil Partner
Divorced Widowed Other

If married, date of marriage/
civil partnership registration

If divorced, date of divorce

Solicitor details

Complete this section if a solicitor has been instructed to deal with the Deceased Member's estate

Solicitor's name

Solicitor's firm

Address

 Postcode

Email address

Telephone numbers Office Mobile

Do you require Heritage Trustees deal direct with the solicitor? Yes No



Information to assist Heritage Trustees Limited with the claim

Did the member die intestate?

Yes No

Has the Grant of Letter of Administration been applied for?

Yes No *If 'Yes' what date was it applied for?*

Is there a valid Will? (If 'Yes' we require the original or certified copy)

Yes No

If no executors were appointed, has a Grant of Letters of Administration with Will been applied for?

Yes No *If 'Yes' what date was it applied for?*

Has a Grant of Probate been requested?

Yes No *If 'Yes' what date was it applied for?***Informant details**

Relationship to the Deceased Member

Title

Mr Mrs Miss Ms Other

Name

Permanent residential address

Postcode

Telephone number

Email address

Date of birth

National insurance number

Please provide us with one form of photo ID and one form of address ID e.g. passport, driving licence, bank statement or utility bill (dated within three months)

Are you a claimant (beneficiary) as well as the informant?

Yes* No ** If Yes, when completing Part 2 "Death Claim Form", please include your details and those of all other beneficiaries*

Declaration

To be signed by the informant

- I understand that the information in section 1 is to notify Heritage Trustees Limited of the death of the member of the Heritage SIPP
- The information shall be used by Heritage Trustees Limited to process the death claim
- I understand this is the initial stage of the claim and further information and documentation may be required to process the claim
- I understand that if the member has died before age 75 the benefits paid will be tax free provided Heritage Trustees Limited complete the claim process within two years from the date they were first notified of the members death
- I understand that if the member has died aged 75 or over or if the member has died before age 75 and Heritage Trustees Limited cannot complete the claim process within two years, the benefits paid will be subject to a tax charge at the beneficiaries' marginal rate of tax
- I confirm the information provided is to the best of my knowledge and belief true and accurate
- I have enclosed an original or certified copy of the death certificate (please note the death certificate must be in English or translated into English by a translation company and certified by a solicitor or notary public in the UK)
- I acknowledge that it would be prudent for financial and wealth preservation reasons to consider (whether for myself or other potential beneficiaries) financial or other appropriate professional advice prior to receipt of benefits from this claim and I understand this is not advice that can be given by Heritage Pensions Limited nor Heritage Trustees Limited.

Signature

Name

Dated



2 Death Claim Form

Please photocopy pages 6 and 7 for every additional beneficiary

Beneficiary details

Relationship to the
Deceased Member

Title

Mr Mrs Miss Ms Other

Name

Permanent residential address

Postcode

Telephone number

Email address

Date of birth

National insurance number

Please provide us with one form of photo ID and one form of address ID e.g. passport, driving licence, bank statement or utility bill (dated within three months)

Chosen option(s)

A Please pay a lump sum death benefit

B Please pay a pension death benefit
(you will need to request and complete a Heritage SIPP application form)

C Transfer out to another pension provider/annuity provider

- If we need to sell any investments to provide the benefits requested above we will notify you of any encashment costs the investment provider proposes charging. Some investments may take longer to encash, in particular if they are gated, suspended, and illiquid or based overseas.



Bank account details

If options A or B have been chosen please confirm the bank account details where payment should be sent

Bank	<input type="text"/>		
Bank address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>
Account name	<input type="text"/>		
Account number/IBAN	<input type="text"/>	Sort code/SWIFT code	<input type="text"/>
Any reference	<input type="text"/>		

Please provide one of the following documents as evidence of the bank details

- Bank statement showing your home address
- Void cheque Void paying in slip

P46

If option B has been chosen please complete a P46 form if the Deceased Member was aged 75 or over at date of death. This can be obtained from the Government website www.pdfFiller.com/100086474-fillable-download-p46-form-in-word-format-hmrc-gov

Beneficiary Declaration

To be signed by the beneficiary

- I understand the completion of this form does not guarantee any entitlement to benefits
- I understand this is the initial stage of the claim and further information and documentation may be required to process the claim
- I understand that if the member has died before age 75 the benefits paid will be tax free provided Heritage Trustees Limited complete the claim process within two years from the date they were first notified of the members death
- I understand that if the member has died aged 75 or over or if the member has died before age 75 and Heritage Trustees Limited cannot complete the claim process within two years, the benefits paid will be subject to a tax charge at the beneficiaries' marginal rate of tax
- I confirm the information provided is to the best of my knowledge and belief true and accurate
- I acknowledge that it would be prudent for financial and wealth preservation reasons to consider (whether for myself or other potential beneficiaries) financial or other appropriate professional advice prior to receipt of benefits from this claim and I understand this is not advice that can be given by Heritage Pensions Limited nor Heritage Trustees Limited.

Signature

Name

Dated



3 Checklist

Please return this form with the relevant documents

- Death certificate - original or certified copy (please note the death certificate must be in English or translated into English by a translation company and certified by a solicitor or notary public in the UK)
- Marriage certificate (if applicable)
- Grant of Letter of Administration
- Will
- Grant of Probate
- Beneficiary ID e.g. one form of photo ID and one form of address ID e.g. passport, driving licence, bank statement or utility bill (dated within three months)
- Bank account ID if the lump sum death benefit option or the pension death benefit option has been chosen e.g. original bank statement, void cheque, void paying in slip
- P46 if the pension death benefit option has been chosen and the Deceased Member was aged 75 or older at date of death
- Heritage SIPP application form if the pension death benefit option has been chosen

