

# Selling in the event of the death of a Fidelity investor

## How to fill in this form:

- This should be completed by the Executor(s) or Administrator(s) and be sent to us with an official sealed Grant of Representation unless already provided.
  - This form should be used to sell an ISA or an investment holding of a Fidelity investor who has died.
  - **If you wish to transfer some of the investments in the account and sell others, you will need to make the transfers first.**
  - Please use black ink and write clearly inside the boxes provided using capital letters.
  - Mark your answers with a cross in the appropriate box like this:
  - We may need to contact you if you don't complete all details correctly which may cause delays to your application.
- If you have any queries about this form please refer to our guide for executors and administrators, this can be found at [fidelity.co.uk/bereavement](http://fidelity.co.uk/bereavement) or call our Customer Services Team on **0800 41 41 16**.
  - Applications can only be accepted using original forms. Photocopies or faxed copies cannot be accepted.

## What's next?

Please send your completed application form to:

**Fidelity**  
**PO Box 391**  
**Tadworth**  
**KT20 9FU**

## 1 About the late account holder

**Their Fidelity Customer Reference Number** (This can be found on the investment valuation letter)

           

**Mark an X in this box if you would like to sell all ISA and Investment Accounts in which case you do not need to complete the Account number details below.**

Please complete the account numbers you wish to sell in their entirety. If you wish to partially sell or transfer you will need to complete the transfer first.

**Account number**

         

**Account number**

         

**Account number**

         

**Account number**

         

**Account number**

         

**Their title**

Mr  Mrs  Ms Other:

**Their surname**

                  

**Their first and other names in full**

                    

**Their date of birth (DDMMYYYY)**

       

**Their date of death (DDMMYYYY)**

       

**Their National Insurance Number**

(this can be found on a payslip or a letter from HMRC)

         

**No National Insurance Number?**

If they were never issued with a National Insurance Number please mark an X in the box.





## 5 Executor/Administrator declaration and signature(s)

- I/We understand that the information I/we provide on this application form will be processed in accordance with Fidelity's data protection statement contained in the Client Terms.
- I/We hereby instruct Fidelity to sell the accounts as confirmed in section 1 and require the money to be released in line with the instructions in section 2.

### Signatures of all Executors/Administrators

#### Executor/Administrator 1



Print name

Date of birth (DDMMYYYY)

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Telephone number

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#### Executor/Administrator 3



Print name

Date of birth (DDMMYYYY)

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Telephone number

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#### Executor/Administrator 2



Print name

Date of birth (DDMMYYYY)

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Telephone number

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#### Executor/Administrator 4



Print name

Date of birth (DDMMYYYY)

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Telephone number

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### All Executors/Administrators must sign.

Corporate bodies should execute under their common seal, or otherwise as determined by their Memorandum and Articles of Association.