

Declaration and Indemnity Form

How to fill in this form:

- Use this form where you are providing an instruction to sell assets to pay Inheritance Tax, to pay funeral expenses or where you want the funds held as cash pending receipt of Grant of Probate
- The form needs to be supported with a certified copy of the will or Letters of Administration (if there is no will) or Certificate of Confirmation – in Scotland).
- 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:

- If you make a mistake, please correct it but don't use correction fluid.
- Any applications received that are not completed correctly may incur delays or could be returned to you.
- If you have any queries about this form please call our Customer Services Team on **0800 41 41 16**

What's next?

Please send your completed application form to:

Fidelity
PO Box 391
Tadworth KT20 9FU

1 Estate information

Name of Account Holder

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Account number

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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2 Declaration

- "Fidelity" is with reference to "Financial Administration Services Ltd.
- I am a personal representative administering the above mentioned deceased person's estate and I declare that I am entitled to administer the estate. I enclose a certified copy of the will, Letters of Administration (if there is no will) or Certificate of Confirmation (in Scotland) which has been certified by either a Solicitor, Barrister, Legal Executive or IFA on every page. I confirm the person providing certification is independent and not related to me.
- I am in the process of obtaining a Grant of Probate and shall send this to Fidelity as soon as possible.
- Fidelity shall be entitled to rely on the statements made by me in this declaration and any information which I provide in relation to the above mentioned deceased person's account.
- I agree to fully reimburse Fidelity for any costs, losses and expenses suffered or incurred by Fidelity arising out of or in connection with Fidelity acting in accordance with my instructions (including any instructions to sell holdings within the deceased person's account) or Fidelity relying on any information or declaration provided by me.
- I understand that where I have provided Fidelity with instructions to sell holdings in the deceased person's estate and it later transpires that I did not have the authority to provide such instructions, the declaration provided in this form means I will be liable for all of Fidelity's costs, including the payment of costs and expenses to a third party.
- I understand that any payment being made in advance of receipt of the grant or probate are made at Fidelity's discretion.
- All personal representatives named in the attached will have authority to provide Fidelity with instructions to sell assets held in the account of the deceased person.
- I understand that any assets which are sold shall be held as cash within the account of the deceased person until Grant of Probate has been obtained and further instruction provided. If a request to pay Inheritance Tax or funeral expenses has been made, this payment will be made at the discretion of Fidelity and payment made directly to HMRC or the Funeral Director.
- If you are in any doubt that these statements are true, you should seek professional advice before signing this form.

Indemnity&Declaration/09.20/v8.0

