

Please complete this form for all sole accounts where the total balance is £50,000.01 or more across all accounts held by the Chelsea. Do not include any accounts held in joint names.

- We'll need a copy of the Grant of Probate or Letters of Administration; this can be an original or a photocopy. The next of kin can apply for these from the Probate Registry. For help contact the Probate Registry on 0300 123 1072 or you may like to seek legal advice.
- Please complete, sign and return the form to us, together with **one piece of ID** for each Executor/Administrator (see page 3), to the Bereavement Team address at the bottom of page 4.
- ID is not required for any Executor/Administrator who is an existing customer of the YBS Group - see below.

SECTION 1 - ABOUT THE PERSON WHO HAS DIED

Title		Surname	
Forename(s)			
Date of birth		Date of death	

Please note: All accounts must be closed, apart from fixed rate bonds which can be kept open until the maturity date. To keep a fixed rate bond open, please mark X here

Account numbers to be closed										

Address and postcode	
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SECTION 2 - EXECUTOR/ADMINISTRATOR DETAILS

Title		Surname	
Forename(s)			
Date of birth			
Address and postcode			
Telephone number			

'YBS Group' refers to Yorkshire Building Society, the trading names under which it operates (Chelsea Building Society, the Chelsea, Norwich & Peterborough Building Society and N&P) and its subsidiary companies.

Chelsea Building Society and the Chelsea are trading names of Yorkshire Building Society. Yorkshire Building Society is a member of the Building Societies Association and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Yorkshire Building Society is entered in the Financial Services Register and its registration number is 106085. Principal Office: Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ.

All communications with us may be monitored/recorded to improve the quality of our service and for your protection and security. Calls to 03 numbers are charged at the same standard rate as 01 or 02 landline numbers, even when calling from a mobile.

EXECUTOR/ADMINISTRATOR DETAILS

Title		Surname	
Forename(s)			
Date of birth			
Address and postcode			
Telephone number			

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Title		Surname	
Forename(s)			
Date of birth			
Address and postcode			
Telephone number			

SECTION 3 – PAYMENT DETAILS

For individual accounts with a closing balance of MORE THAN £25,000, the payment options are (please tick one):

<input type="checkbox"/> Pay into CBS or YBS account number																				
<input type="checkbox"/> Send a cheque	Made payable to:																			
	Post to this address:																			

For individual accounts with a closing balance of LESS THAN £25,000, the payment options are (please tick one):

<input type="checkbox"/> Pay into CBS or YBS account number																					
<input type="checkbox"/> Send a cheque	Made payable to:																				
	Post to this address:																				
<input type="checkbox"/> Pay by bank transfer	Payee name:																				
	Sort code:																				
	Account number:																				
	Reference number:																				

All the Executors or Administrators named on the Grant of Probate or Letters of Administration will need to sign this section.

Signature of all Executors or Administrators

Date

IDENTIFICATION

Here's a list of the documents we accept as proof of your name and identity. We need to see **one piece of ID** from this list for each **Executor or Administrator** named on this form. This can be an original or a copy. ID is not needed if you are an existing customer of the YBS Group.

- Current signed passport (UK or foreign)
- Current EU or UK photo card driving licence (full/provisional) or full UK driving licence (copy needed of both front and back)
- Biometric residence permit issued by the Home Office to foreign nationals from 30 June 2021
- eVisa issued by the Home Office. A share code and date of birth must be provided
- Current EU member state ID card
- Current foreign national ID card
- Current British armed forces ID card
- HMRC coding/assessment/statement/tax credit letter issued in the last 12 months (not a P45 or P60)
- Letter from Department for Work and Pensions (DWP), Pension Service, Job Centre Plus, government or local authority issued in the last 12 months showing evidence of entitlement to benefits
- Current UK firearms certificate
- Current UK disabled person's blue badge.

You can provide photocopies (not photographs) or originals of the ID. You MUST NOT send in original documents which have a photo or signature on them, such as a driving licence or passport. For these, you must send photocopies. Any original documents will be sent back to you.

HOW WE USE YOUR PERSONAL INFORMATION

Reference to 'We' 'Our' 'Us' and 'the Society' in this section are to Yorkshire Building Society trading as Chelsea Building Society and the Chelsea. Yorkshire Building Society decides what personal information we need to collect about you, how we use it, who we share it with and how long we keep it. This makes us the data controller of your personal information for data protection purposes. We will use the personal information obtained from you and additional information obtained in the course of opening and managing your account. This includes, but is not limited to, name, address, identification, account transactions and communications and where relevant sensitive information, credit reference data, financial crime data, health details, nationality and legal proceedings. We will respect your rights to privacy and will only collect, use, store and share your personal information where the following lawful purposes apply:

- It's necessary for the performance of a contract you have or have requested to enter into.
- If we have a legal obligation.
- If we have a legitimate business interest where it does not have an unfair impact on you.
- If you have given your consent where the collection, use, storage or sharing involves special category (sensitive) personal information (e.g. health, race and religion).
- Where we believe you or another person is at risk and we need to protect your or their vital interest.
- Where it's in the public interest or we have been given official authority to do so.

For full details of the types of information used in each product, and the other lawful purposes we may use it for, please see our 'How we use your personal information' booklet which can be found at thechelsea.co.uk/privacy or by visiting one of our YBS branches or agencies. When you apply for an account we will use your personal information together with other information available (including relevant sensitive information, (e.g. health, race and religion)) for:

- Identity verification (including checking documents with issuing authorities e.g. driving licence – DVLA).
- Processing your application.
- Contacting you where necessary.
- Fraud prevention and detection.
- Administering your account.
- Legal and regulatory compliance.
- Marketing (where we have your consent) and market research.
- General business purposes.

We will only use, keep and share your personal information as required to meet our legal and regulatory obligations or to deal with your enquiry, administer, and manage your accounts, products and relationship with us. After this time, we will delete your personal information in line with the requirements of the Financial Conduct Authority, Prudential Regulation Authority, Money Laundering regulations, Financial Ombudsman Service, HMRC and any other regulatory bodies.

WE MAY DISCLOSE YOUR PERSONAL INFORMATION WITH OTHER PEOPLE OR ORGANISATION AS FOLLOWS

- With Yorkshire Building Society and its subsidiary companies for fraud prevention, lawful purposes, account administration and for general business purposes (e.g. updating customer records, handling customer queries and complaints).
- Personal information to: (i) our external auditors and regulatory bodies including the Financial Ombudsman Service, Prudential Regulation Authority and the Financial Conduct Authority; and (ii) associate companies, agents and service providers including solicitors and valuers acting for the Society, field agents, debt recovery agents, tracing agents, letting agents, brokers, printers, market research agencies and providers of information technology services.
- If we sell or transfer all or part of our business, we may share or transfer our customer records as part of the proposed/actual sale or transfer. However, we will only do so under a contract or where we have a legal obligation to do so. The protection, security and confidentiality of your personal information are important to us and we put in place appropriate safeguards to manage this.

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YOUR RIGHTS UNDER DATA PROTECTION LAWS

You have the right to:

- Be informed about processing of your personal information.
- Have your personal information corrected if it is inaccurate or incomplete.
- Object or restrict to the processing of your personal information.
- Have your personal information erased subject to conditions (e.g. where the processing fails to satisfy legal requirements).
- Request access to your personal information and details about how we process it.
- Move, copy or transfer your personal information - also known as 'data portability'.
- Challenge automated decision-making, including profiling which tracing agents, letting agents, brokers, printers, market research agencies and providers of information technology services we use
- If we sell or transfer all or part of our business, we may share or transfer our customer records as part of the proposed/actual sale or transfer. However, we will only do so under a contract or where we have a legal obligation to do so. The protection, security and confidentiality of your personal information are important to us and we put in place appropriate safeguards to manage this.
- We may use automated processing of your personal information to evaluate certain things about you.
- Complain to the Information Commissioner's Office (<https://ico.org.uk/>) which enforces data protection laws.

For more information please see our 'How We Use Your Personal Information' and 'Your Rights and Data Protection' booklets. Our 'How We Use Your Personal Information' booklet explains what personal information we need to collect, why we need it, where we may obtain information from and how long we keep it for. Our 'Your rights and Data Protection' Booklet provides more information on data protection laws, our legal obligation and your individual rights in relation to the processing of your personal information. To obtain a copy of these booklets, or if you wish to invoke any of the rights listed above, simply visit our website [thechelsea.co.uk /privacy](https://thechelsea.co.uk/privacy) or alternatively call us on **0345 166 9300** or visit us in branch or agency. If you want to see what personal information we hold about you, you can request a copy of this by completing a Subject Access request form. This form can be found on our website thechelsea.co.uk/privacy

Our Data Protection Officer (DPO) provides help and guidance to make sure we apply the best standards to protecting your personal information. You can contact the DPO by writing to:

✉ Data Protection Officer, Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ. Or by emailing: dpo@ybs.co.uk

Our printed material is available in alternative formats e.g. large print, braille or audio. Please call us on **0345 166 9300**.

WE'RE HERE TO HELP

📞 **CALL US ON 0345 1669 229**

🏠 **VISIT YOUR NEAREST BRANCH**

✉ **WRITE TO US AT:**

**BEREAVEMENT TEAM
CUSTOMER SERVICES
CHELSEA BUILDING SOCIETY
YORKSHIRE DRIVE
BRADFORD
BD5 8LJ**

🌐 **VISIT [YBS.CO.UK](https://ybs.co.uk)**

