

Triodos Bank. Bereavement Notification Form.

Who should complete this form?

This form may be completed by any personal representative of a Triodos Bank UK customer, to notify us of the customer's death.

How to complete this form

We understand that dealing with practical matters while experiencing grief can make this a difficult time. We have tried to make this process as simple as possible by providing the option of completing this form electronically or printing it to complete by hand.

Digital form (pdf)

- Fill in this digital pdf and sign it electronically
- Email it to: bereavements@triodos.co.uk
- Attach a scan of the Death Certificate to your email, if possible.

Paper printout

- Print this blank form or complete it electronically before printing
- Complete it using **BLOCK CAPITALS** and sign where indicated
- Enclose any paper documents requested
- Send it to **FREEPOST** Triodos Bank (no stamp required), and your letter will be delivered to us free of charge by Second Class mail, or alternatively to our full address: **Bereavement Team, Triodos Bank, Deanery Road, Bristol, BS1 5AS.**

Do you need help with this form?

You can find **Useful Information and Frequently Asked Questions (FAQs)** at the end of this form. For more information, visit: www.triodos.co.uk/bereavement

If you need extra support, our team of specialists are also on hand to help and can complete the form with you by phone if you prefer.

Please call us on **0330 355 0355** if you need assistance completing the form (or **+44 117 973 9339** from abroad).

Your rights regarding personal data

As we're collecting your personal details, you should view our Privacy Statement for information on how we use and share your personal information. This can be found at: www.triodos.co.uk/privacy-statement

Mandatory fields are indicated by an asterisk (*)

Section 1 Details of the deceased customer

Please provide these details in full so we can find the deceased customer's account and update our records accordingly. It is helpful if these details match those on the Death Certificate.

Title

Forename(s)*

Surname*

Address*

Postcode

Date of birth*

/ /

Date of Death*

/ /

Section 2

Details of the deceased's accounts

Please provide us with details of the deceased's Triodos accounts, if you have them. You are not required to provide these, but any details you can share may be useful in helping us find the deceased's accounts.

You may find details of the types of accounts and account numbers on correspondence which we've sent to the deceased.

Use the **Useful Information and FAQs** at the end of this form for an overview of account types, and details of what will happen to these accounts once we've been notified of the death.

Type of account e.g. current account, savings account, etc

Account number (if known).

Important information for Depository Receipt holders only

Depository Receipts may be held on a Multilateral Trading Facility which is managed by an external provider called Captin. Alternatively they are listed on Euronext Amsterdam via a broker. If the deceased held these investments, the new holder will need to register with Captin or the broker and complete a further identity check with them. We are unable to transfer the Depository Receipts to the representative or beneficiary until they have registered with Captin or a Broker.

We will write to you confirming the situation if this applies.

Would you like us to send you a valuation of the accounts?*

You may require this when calculating Inheritance Tax, for example.

Yes

We will be able to provide this when we have verified the Death Certificate.

No

You can still request this later if you need it.

Section 3

Your details

Your personal details will be used for the purposes of managing the account(s) of the deceased customer named in section 1, up until the accounts are closed. Please note, if you already have an account with Triodos Bank, we will make a note of this on your existing record.

We will usually verify your identity and address electronically via a third party. You will receive an email from Experian titled 'Affordability Passport' to complete an e-ID check. If this is not possible, we may ask you to send in further information or documents.

Legal Firm completing this form

If you are a solicitor or firm representing the deceased, please provide the following

Firm Name

Firm Contact Number

If a legal firm is managing the estate and completing this form we will verify your credentials. You declare that you have completed due diligence on the executors including verification of identity. However, we will still need full details of the personal representatives.

Title

Forename(s)*

(please use your full name and not a nickname)

Surname*

Address*

Postcode*

Date of birth*

/ /

How do you know the deceased? (Spouse, friend, solicitor, etc)*

Best time(s) to contact you

Please let us know the best time(s) to contact you and provide us with your contact details in the boxes below. We are available Monday to Friday 08:30-17:00.

Contact me

Avoid contacting me

Contact telephone number*

Email address*

Support required

If you need additional support for any reason that we should be aware of, please let us know in the box below. For example, if you need correspondence in large print, can't access emails or prefer not to communicate by phone because of hearing or speech issues.

Alternatively, if you need additional support and would prefer to go through this in more depth with us, you can tell us the best way we can contact you so we can get further details about what you require:

Email

Telephone

Please Note: If you prefer contact via email, please provide us with your email address.

Email address

Are you a personal representative of the deceased?* (This means you are dealing with their estate)

Yes

If yes, please tick which of the following applies to you*

Executor of a will (person legally responsible for carrying out instructions set out in the Will)

Administrator of the deceased's estate (the person responsible for dealing with the estate if there are no executors)

Next of kin (no valid will exists)

No

If no, please provide the details of the personal representative(s) in section 4

Are there any other Personal Representatives?*

Yes

Please provide their details below, in section 4

No

Please skip to section 5

Section 4

Details of Other Personal Representatives

For each other personal representative, please complete all fields (name, address, date of birth, etc.) Failure to do so may cause a delay.

As in Section 3, these details will be used for the purposes of managing the account(s) of the deceased customer named in section 1, up until the accounts are closed or you are no longer responsible for them.

Please note, any personal information provided in this section may affect any existing records held by the representatives with Triodos Bank.

We will usually verify the identity and addresses of all representatives electronically using the information provided. If this is not possible, we may ask you (or others managing the estate) to send in further information or documents.

If you run out of space for representatives on the form, please provide the additional details when submitting the form via email to bereavements@triodos.co.uk or on a separate piece of paper.

Are you aware of any other personal representatives that are unwilling or unable to act?

Yes

If yes, give details

No

2nd representative

Title

Forename(s)

(please use your full name and not a nickname)

Surname

Address

Postcode

Date of birth

/ /

Relation to the deceased

Contact telephone number

Email address

3rd representative

Title

Forename(s)

(please use your full name and not a nickname)

Surname

Address

Postcode

Date of birth

/ /

Relation to the deceased

Contact telephone number

Email address

4th representative

Title

Forename(s)

(please use your full name and not a nickname)

Surname

Address

Postcode

Date of birth

/ /

Relation to the deceased

Contact telephone number

Email address

Section 5 Required documentation

Please note, you may want to send original or certified documents by recorded or tracked delivery to ensure they don't get lost in the post. But be aware, most delivery companies will charge for this service.

Do you have a copy of the Death Certificate?*

Yes

Digital: Please attach a clear scan or photograph of the whole document to your email. **Paper:** Please send us the document with this form.

No

You may return this form to us without a certificate in order to notify us of the death – however we will not be able to provide an account valuation, close the account or allow access to the funds until we receive this. We will attempt to verify the death using a copy of the certificate. In some cases we may need to follow up with a request to see the original Death Certificate or a colour copy that has been professionally certified.

Is a Grant of Probate, Letters of Administration or Certificate of Confirmation required in managing the estate?*

Please read our Useful Information and FAQs at the end of this form, if you're not sure what these are.

Please note, we will require the Grant of Probate, Letter of Administration or Certificate of Confirmation (whichever applies) if the balances held with Triodos Bank are £25,000 or more.

Yes

Please send us a copy of this document by post. We cannot accept copies of these documents by email. In some cases we may need to follow up with a request to see the original document or a colour copy that has been professionally certified. **Please note, if you're applying for probate, we won't contact you again for around six months. This is because applying for probate can take this long.**

No

Please send us the original or a certified copy of the Will by post.

If no valid Will exists, please tick here

No will in place

Will was lost or destroyed

Other

Section 6

Crowdfunding accounts only – Bonds and Shares

Please complete this section if you're aware of the deceased holding Triodos Crowdfunding investments. If you're not sure, we will write to you so you can confirm your instruction later.

Triodos Crowdfunding investments may be **transferred** to a new holder. It may also be possible to **redeem** them if the issuing company agrees to buy the investments back. Please note that this is completely at the issuers discretion as these are long-term investments.

If you select the option to transfer, the new investment holder will need to register on our crowdfunding platform so we can transfer the investments (and any cash in the Crowdfunding 'wallet') to their name. Visit www.triodoscrowdfunding.co.uk/register

If you select the option to redeem, we will contact the issuing company to request this. Once we have received a response, we will let you know if the redemption is possible or if the investments must be transferred.

Remember that the value of investments can go down as well as up, and you may get back less than originally invested.

Name of investment

Transfer or Redeem

Name of investment

Transfer or Redeem

Name of investment

Transfer or Redeem

Section 7

Access to funds in the account(s) before closure

We can usually release funds from a deceased customer's current or savings accounts to pay for urgent inheritance tax and funeral expenses. However, we can't guarantee this and will require the additional documentation set out below.

Only complete this section if you require funds to be released before the account is closed. Please note, you can request this at any point until the accounts are closed.

Inheritance tax

Payment will be sent directly to HMRC.

Yes

Please post us a completed HMRC IHT423 form for each account required, when ready. This must be signed by all representatives named on the Grant of Probate or in the Will. We must know who the executors/representatives are and at least one person signing the IHT423 form must have passed an identity check.

Funeral bill

Payment will be sent directly to the funeral directors.

Yes

Please post us an original funeral bill or invoice, when ready.

Section 8 Declaration

To be signed by all representatives, as named on the Original or Certified copy of Grant of Probate.

- I/We confirm that I/we authorise Triodos Bank to make any further enquiries that are deemed necessary to confirm the details on this form
- I/We confirm that each signatory named on this form has consented to Triodos Bank verifying their identity.

Representative 1

Full name

Representative 1 signature

Date

/ /

Representative 2

Full name

Representative 2 signature

Date

/ /

Representative 3

Full name

Representative 3 signature

Date

/ /

Representative 4

Full name

Representative 4 signature

Date

/ /

Section 9

What to do next

Thank you for completing this form. Please check that you have answered all mandatory questions and that each personal representative has signed the form, giving their consent for electronic ID checks.

Send us the form and required documents

- Keep a copy of the form for your records
- Send us the form, Death Certificate and other required documents (see below) by email or post.

Required documents

- Copy of the Grant of Probate if one exists. Otherwise, a certified copy of the Will (see Section 5)
- If applicable: invoice or bill for any funeral expenses you request to be paid from the accounts (see Section 7)
- If applicable: HMRC Direct Payment Scheme form (IHT423) if you require Inheritance Tax to be paid from the accounts (see Section 7).

Our email address is: bereavements@triodosbank.co.uk

Our address is: **Bereavement Team, Triodos Bank, Deanery Road, Bristol, BS1 5AS.**

Alternatively, you can send documents to 'FREEPOST Triodos Bank'. This is a second class service with no stamp required.

Important information on required documents

- All **certified copies** must be in **colour** and certified on each page
- Any original documents will be returned to you.

Who can produce a certified copy?

It is very important that any certified copy is produced by someone in a relevant role and provides a full certification as detailed below. We may contact them to verify the document, so they should provide direct contact details, too. We recommend that this form is taken to whomever is certifying your documents to ensure that the certification meets our requirements.

The following people can certify documents for you:

- Accountants with a current 'practicing' membership, registered with ICAEW, ICAS, CAI, ACCA, CIPFA or CIMA
- Solicitors
- Bank staff (must include branch stamp)
- Post Office – (Please check their website www.postoffice.co.uk/identity/document-certification or with your local branch as they are not able to certify all document types).

**Please note a fee may be charged for using any of these services

Please note that you can request additional official copies of Birth, Marriage or the Death Certificates at the time you obtain the original from the Register Office. You may also request official copies at a later date from the General Register Office: Order a copy of a birth, death or marriage certificate (www.gov.uk).

Certifiers must clearly write that they **have seen the original document**. They must also **include their full name, profession, business address, phone number and the date** they certified the document. Please make sure that any certified copies show the full document and are clearly legible.

Incomplete certifications will not be accepted, and we will ask for another document. Please call us before posting your items if you are unsure what to send.

What happens next?

Once we've received the Bereavement Notification Form (this form):

- We will let you know when we have received the form
- All sole account(s) will be frozen (see above)
- If identity verification has not already been conducted by a solicitor handling the estate, we will initiate identity checks for each personal representative via a third party. You will receive an email from Experian titled 'Affordability Passport' to complete an e-ID check. This is not a credit check. Please follow the instructions in the email to promptly complete the identity verification
- Our Bereavement Team will confirm whether we require the Will or Grant of Probate to close the account(s).

If we need additional information, we will contact you.

Useful information and Frequently Asked Questions (FAQs)

Please keep this information for your own records should you need it in the future. You do not need to return this section of the form to us.

This information is here to help you complete the bereavement notification form and explains what happens next. For a full list of FAQs and useful organisations who can support you, please visit www.triodos.co.uk/bereavement.

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What happens to a Triodos customer's accounts after they have died?

Once we've been notified that a customer has died:

- Joint accounts will remain open in the name of the other account holder, who will be able to use the account/s as usual
- For sole accounts, we will stop all payments and block access to all of the deceased's Triodos accounts (including those where you've not been able to provide us with the details)
- We will remove the deceased's online access to the accounts (via both internet banking and the Triodos Mobile Banking App)
- Any debit cards in the deceased's name will be cancelled
- Regular payments like Direct Debits and Standing Orders will be stopped. If any of these need to continue (for example, payments for utility bills) please contact the companies who require the payments to make new arrangements
- We will stop all marketing mailings. If there are mailings already in the process of being sent, it may be too late to stop these
- We will continue to send important communications about any changes to the accounts or services, such as changes to savings rates or Terms & Conditions. These will be addressed to 'The Estate of [deceased customer]' until we have received the completed bereavement notification form
- Business accounts where other account operators or owners are in place will remain open and new account operators may be appointed by the business
- We will remove any Powers of Attorney from the accounts, because the Power of Attorney becomes null and void when the person dies. This includes Internet Banking and account access held by attorneys.

I'm not sure what kind of accounts the deceased held? What should I do?

You might find types of accounts and account numbers on correspondence we have sent to the deceased, but please don't worry if you can't find everything. This information is useful in helping us find the deceased's accounts but may not be required.

Here's an overview of Triodos accounts we offer, which may help you understand what kind of account the deceased held with us:

- **Triodos Current Account** – a personal bank account with a debit card.
- **Savings accounts** – a range of savings accounts with different rates of interest and terms, such as the Everyday Savings accounts and Ethical Savings Bonds.
- **Cash Individual Savings Account (ISAs)** – these are tax-efficient savings accounts such as the Online Cash ISA, Fixed Rate Cash ISA and Junior Cash ISAs.
- **Impact Investment Account** – a general investment account which can hold one or several of our Impact Funds.
- **Stocks and Shares ISA** – a tax-efficient investment account which can hold one or several of our Impact Funds.
- **Crowdfunding investments** – our crowdfunding platform allows customers to invest directly into UK-based businesses looking to raise money via shares and bonds. More information is available at www.triodoscrowdfunding.co.uk
- **Innovative Finance ISA** – a tax-efficient investment account which can hold crowdfunding investments.
- **Depository receipts** – these offer a way to directly invest in Triodos Bank. Depository Receipts may be held via a Multilateral Trading Facility with an organisation called Captin or will be listed on Euronext Amsterdam via a broker (see www.triodos.com/en/investing/triodos-bank-depository-receipts for more information).

You can find the full list of personal accounts we offer at www.triodos.co.uk/individual and business accounts at www.triodos.co.uk/business.

Once we've been notified of a customer's death and the completed bereavement notification form has been returned to us, we will send you further details regarding the deceased customer's accounts and options for distributing assets

What is the Grant of Probate, Letters of Administration, and Certificate of Confirmation documents?

A **Grant of Probate** is a legal document that authorises the executor to manage the deceased's estate in accordance with the Will. You can find more information at gov.uk/applying-for-probate. In Scotland, the Grant of Probate is referred to as the "**Certificate of Confirmation**". You can find out more about dealing with a deceased's estate in Scotland at scotcourts.gov.uk.

Letters of Administration may apply if the deceased did not leave a Will. These allow a family member or friend to act as the administrator of the deceased's estate.

Please note, if a Grant of Probate, Letters of Administration, or Certificate of Confirmation document is being applied for, we will need to see it before we can process the closure. We will also need to see one of these documents if the value of the deceased's assets with Triodos Bank are worth £25,000 or more.

What happens to Triodos Impact Fund investments?

Any Triodos Impact Fund Investments, whether held in an Impact Investment Account or Triodos Stocks and Shares ISA, will need to be sold and the proceeds transferred to a bank account chosen by the executor. Unfortunately, we're not able to transfer the existing investments to a new investment account or beneficiary.

Please note that until the Triodos Impact Fund Investments are sold, they will remain invested which means their value may change. With any investment, there's the risk that you could get back less than initially invested.

You can find more information on Triodos Impact Investments, Impact Investment Accounts, and Stocks and Shares ISAs at triodos.co.uk/impact-investments.

What will happen to any Crowdfunding investments?

Triodos Crowdfunding investments may be transferred to a new investment holder, who will need to open a Crowdfunding account if they do not already have one. It is sometimes possible to redeem the investments (have them paid out) instead of transferring them. This is ultimately at the discretion of the directors of the company that issued the investment.

If you select the option to transfer, the new investment holder will need to register on our crowdfunding platform so we can transfer the investments (and any cash in the Crowdfunding 'wallet') to their name. Please visit www.triodoscrowdfunding.co.uk/register.

If you select the option to redeem, we will contact the issuing company to request this. It can take time for the company to respond. Once we have received a response, we will let you know if the redemption is possible or if the investments must be transferred. If you're not sure whether an investment is right for you, or on the best course of action, you may wish to consider financial advice.

Please complete section 6 of the bereavement notification form if you're aware of the deceased holding any crowdfunding investments. If you are not sure, please leave this section blank and we will write to you with information on your options.

You can find more information on crowdfunding investments at triodoscrowdfunding.co.uk

What will happen to any Depository Receipts?

Depository Receipts (DRs) offer a way to invest directly in Triodos Bank. Any DRs investment may be held with an external provider called Captin or will be listed on Euronext Amsterdam via a broker.

They can only be transferred to a new DR holder, in accordance with the Will. DRs cannot be transferred to beneficiaries living overseas. The new DR holder will need to register with Captin or the broker and complete a further identity check with them before the DRs can be transferred into their name. Once the DRs have been transferred to the new holder, they can be sold via Captin or the broker. The beneficiaries will be able to review their holding with Captin or the broker once the transfer is complete.

If you're not sure whether an investment is right for you, or on the best course of action, you may wish to consider financial advice.

Does Triodos offer an Annual Permitted Subscription (APS) for Individual Savings Accounts (ISAs)?

An APS allows a surviving spouse a one-off ISA subscription equal to the total value of the deceased's ISAs at the date of their death. This needs to be completed within three years of the date of death. Unfortunately, we're unable to accept an APS into a Triodos ISA, but we can provide a valuation of the deceased's Triodos ISAs on date of death, and this can be shared with other ISA providers who accept APS's. You can find out more about APS's on the government website: gov.uk/guidance/manage-additional-permitted-subscriptions-into-an-isa.

How will you contact me?

We will usually contact you by email where we need additional information or to provide an update. If you can't access emails or require correspondence to be sent in the post, please let us know.

How long does it take from notification of death to closing the accounts?

The timescales can vary significantly and be influenced by a wide range of factors. Things like applying for Probate can take a long time and may slow things down. For this reason, if you tell us that you're applying for Probate, we won't contact you for at least six months. You can of course reach out to us if you have all the required information before this time.

Where can I go for additional support

We know there is a lot to manage when dealing with the loss of a loved one and it can be an immensely challenging and painful experience. You can find useful guidance on what to do when someone dies on the UK Government website at gov.uk/when-someone-dies.

For bereavement and grief support, you may wish to reach out to **Cruse Bereavement Support**. They are a specialist bereavement charity available online at cruse.org.uk or over the phone on **0808 808 1677**. They have specialised teams and resources who can provide counselling and assistance, tailored to individuals and families coping with loss.

If there is anything we can help you with, please give us a call during our opening hours on **0330 355 0355**.

If you're a Triodos customer, you could also send us a chat message through the Triodos App or Internet Banking. Please note that you will need to reference the deceased customer's account number.

Large print, braille and audio versions available on request.

Telephone: 0330 355 0355 (or +44 117 973 9339 from abroad).
www.triodos.co.uk

Calls to and from Triodos Bank may be recorded for training and monitoring purposes.

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