Marcus:
by Goldman Sachs®

Tell us about a bereavement

Complete this form if you've recently lost someone close that held one or more account(s) provided by Goldman Sachs International Bank under the Marcus or Saga Savings brand.

You should complete this form if:

- **You are either the personal representative(s) or the next of kin:** please complete Section 1 and Section 2.

  You should still complete these sections even if you also held a joint account with the deceased.

- **You are not the next of kin or personal representative but you held a joint account with the deceased:** please complete Section 1 and Section 3.

Please note: if there is more than one acting personal representative, then **you must all sign this form.** If you are aware that other personal representatives are not acting, please also call us on the number below.

Acting on behalf of someone else

If you are the personal representative or next of kin but you have arranged for someone else to act on your behalf (as an attorney), you or your attorney should call us on the number below before completing this form.

If you're not sure if you should complete this form, have a question or would like any support completing it, please call us on 0800 085 6789. Our lines are open Monday to Friday, 8am to 8pm (excluding bank holidays).

Once completed, please post this form to:
Marcus UK
PO Box 74787
London
EC4P 4JG

Please send us the death certificate

Please also send us an original death certificate. We'll always return this document to you.

Personal data

Any personal data provided on this form will be used in line with our privacy policy, which is available on our website at **marcus.co.uk/privacy-policy**.

If the deceased customer also had a Saga Savings account, we'll also use the personal data provided on this form in line with the Saga Savings privacy policy, available at **sagasavings.co.uk/privacy-policy**.

Section 1: Notification of bereavement

Please always complete this section with any information you have. We'll also check if the deceased held any other Marcus accounts or any Saga Savings accounts provided by Goldman Sachs International Bank.

Please enter the personal details of the deceased customer.

Name of account holder

Address

Postcode

Date of birth

Account number

Sort code

Account number

Sort code

Account number

Sort code

Account number

Sort code

Section 2

Please complete this section if you are the next of kin or personal representative, or if you're an attorney acting on behalf of one or more personal representatives or the next of kin.

We'll treat you as the 'next of kin' if you're the person who would be entitled to act as administrator and deal with the deceased's estate.

Note: If you're acting on behalf of the personal representative or next of kin (as an attorney), please complete this section as if you are that representative or next of kin.

Section 2a: Confirmation of role

Select the option that applies to you from the boxes below:

☐ I am the deceased customer's next of kin or I am acting on behalf of the next of kin.

☐ I am the personal representative for the deceased customer's estate or I am acting on behalf of a personal representative.

☐ There is more than one personal representative (or acting on behalf of a personal representative) for the deceased customer's estate

Section 2b: Your details

Please provide your contact details below. If there is more than one personal representative, please provide the personal details of each representative.

You can choose to name one person as a primary contact. If we need further information or instructions, we'll only contact this person (unless there's a legal reason not to). The primary contact can also be an attorney acting on behalf of one of the personal representatives.

☐ Treat this person as the primary contact.

Your name

Address

Postcode

Date of birth

Phone number

Alternative contact number

Email address

Relationship to the deceased

Other personal representatives

Name

Address

Postcode

Date of birth

Phone number

Alternative contact number

Email address

Relationship to the deceased

Name

Address

Postcode

Date of birth

Phone number

Alternative contact number

Email address

Relationship to the deceased

Name

Address

Postcode

Date of birth

Phone number

Alternative contact number

Email address

Relationship to the deceased

Section 2c: Solicitor details (only complete if applicable)

If you have appointed a solicitor to act on your behalf who may contact us in relation to the deceased customer's account(s), please enter their details below.

☐ Please direct all correspondence to this solicitor only.

Contact name

Name of firm

Address

Postcode

Phone number

Section 2d: Instructions for sole accounts

Once we've verified the documents you provide our standard procedure is to close **all sole account(s)** held by the deceased with either Marcus by Goldman Sachs or Saga Savings, and return any money to the relevant linked account. The linked account was the account used by the deceased to make all payments into and out of their account(s) with us.

If the deceased held accounts with both Marcus and Saga Savings, they may have had a different linked account for each brand. In this case, we'll usually pay the total amount for each brand to the relevant linked account separately. **If you'd prefer one consolidated payment, please contact us before completing this form.**

We can also raise cheque payments – for example if you would like help paying funeral costs, court fees or Inheritance Tax. Please note that cheques can take up to 10 working days after we close the account to clear.

Please confirm what you'd like us to do in relation to **all sole account(s)** held by the deceased:

☐ Close all sole accounts and transfer the money back to the deceased's linked account.

☐ Raise a cheque to the personal representative named below. We'll contact you if you select this option.

☐ Request more information about the deceased's accounts and/or the available options before you give instructions. We'll contact you if you select this option.

Name

Address

Postcode

Date of birth

Phone number

Alternative contact number

Email address

Relationship to the deceased

Section 2e: Declaration

Please read the declaration and sign below to confirm your instructions.

I confirm and agree that:

- I am the deceased's personal representative/next of kin or acting on behalf of the personal representative or next of kin.
- I am entitled, either solely or with others, to provide instructions in relation to the balance(s) in any sole accounts the deceased customer held with Goldman Sachs International Bank under the Marcus or Saga Savings brand.
- Where anyone else is entitled to a share of this money, I confirm that I have their consent to make decisions about the estate, including (but not limited to) how the estate is settled.
- I will be responsible for any losses or costs that Goldman Sachs International Bank suffers as a result of any other person being entitled to a share of the money that Goldman Sachs International Bank pays in accordance with this instruction form or in accordance with subsequent instructions given by me.
- To the best of my knowledge the deceased's estate is not insolvent.
- Where applicable, the primary contact named in Section 2b is authorised by each of the personal representatives to provide further instructions in relation to the deceased's accounts on our behalf if necessary. We are not aware of any limit on our ability to authorise the primary contact in this way.
- If I have authorised the closure of sole accounts held by the deceased in Section 2d, I understand that this covers all sole accounts held by the deceased with Goldman Sachs International Bank under the Marcus or Saga Savings brand (even if I have not listed them on this form).

If there is more than one personal reperesentative, each of you must review this declaration and confirm agreement by signing below.

Signed ______________________ Date ______________________

Name ______________________

Signed ______________________ Date ______________________

Name ______________________

Signed ______________________ Date ______________________

Name ______________________

Section 2f: Joint accounts

If the deceased held any **joint accounts** with Marcus by Goldman Sachs or Saga Savings, those accounts will usually be automatically transferred into the sole name of the remaining joint account holder. We'll get in touch separately with the joint account holder (if it's not you), but we won't usually contact you about this again. You can always get in touch with us if you need more information.

Section 2g: Cash ISAs

We'll keep the Cash ISA of the person who has died open until either:

- You ask us to close the account and return the money to the deceased's linked account.
- The administration of the estate is complete.

Remember: it's the personal representative or next of kin's responsibility to tell us if the administration of the estate is complete. We'll assume it's ongoing until we're told otherwise.

Section 3: Joint account holders

Please complete this section if you held joint account(s) with the deceased, but you are not the deceased's personal representative/next of kin.

Once we've verified the documents you provide, we'll automatically transfer the joint account(s) you held with the deceased into your name only, unless there's a legal reason not to.

For security reasons, we will need to restrict online withdrawals from the deceased's account while we're waiting for the right documents. If you need to take money out of the joint account in this time, please call us. If you'd prefer to close the account(s) instead, please contact us.

Remember: If your joint account holder held any other accounts with Marcus or Saga Savings in their sole name, their personal representative or next of kin will need to complete this form for those accounts.

Please sign below to confirm that you have reviewed this section:

Signed ______________________ Date ______________________

Name ______________________