



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

## How to fill in this form:

- This form can be used for selling the investments in an ISA, Lifetime ISA or Investment Account that belonged to a Fidelity customer who has died. It should be completed by their executors or administrators.
- Please note that this form is only for selling the investments in an account, not transferring them to other investors. If you would like to sell some of the investments in an account and transfer others, please complete the transfers first, using the appropriate form at [fidelity.co.uk/bereavement](https://www.fidelity.co.uk/bereavement)
- 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 questions about this form, please see our guide for executors and administrators a [fidelity.co.uk/bereavement](https://www.fidelity.co.uk/bereavement) or call our Customer Services on **0800 41 41 16**.
- We cannot accept a photocopy or fax of this form. It must be the original.

## What's next?

Please send your completed form, along with the sealed grant of representation (probate), unless you've already provided it, to:

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

If you only have one grant of probate and don't want to put it in the post, you can get copies from the probate office. Alternatively, you can send us a photocopy, but it must be certified. You will find details of how to get copies certified in our guide for executors and administrators at [fidelity.co.uk/bereavement](https://www.fidelity.co.uk/bereavement).

## 1 About the account holder

### Their Fidelity Customer Reference Number

(This can be found on the investment valuation letter. It is 10 digits long, starting 100. Please note that it is different from an account number.)

**Mark an X in this box if you would like to sell the investments in all of the accounts that belonged to this investor. In this case, you do not need to give us the account numbers below. Account numbers are 10 characters long and start with a capital letter. You will be able to find them on the letter we sent you acknowledging the death.**

Please remember that this form is an instruction to sell ALL the investments in an account. If you would like to sell some of the investments in an account and transfer others, you should complete the transfers first.

### Account number 1

### Account number 2

### Account number 3

### Account number 4

### Account number 5

### Their title

Mr  Mrs  Ms Other:

### Their surname

### Their first name

### Their middle name/s

### Their date of birth (DDMMYYYY)

### Their date of death (DDMMYYYY)

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## 4 Person we should send transaction confirmations to

When we sell the investments in the account we will send transaction confirmations to the person whose name and address you give us below.

### Their title

Mr  Mrs  Ms Other:

### Their surname

### Their first name

### Their middle name/s

### Address

House number/name

Street, city, county and country

Postcode

## 5 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 instruct Fidelity to sell the investments from the accounts shown in section 1 and release the proceeds of the sale in line with the instructions in section 2.

All executors/administrators must sign.

### Signature 1



Print name

Date of birth (DDMMYYYY)

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Telephone number

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### Signature 2



Print name

Date of birth (DDMMYYYY)

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Telephone number

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### Signature 3



Print name

Date of birth (DDMMYYYY)

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Telephone number

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### Signature 4



Print name

Date of birth (DDMMYYYY)

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Telephone number

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In the case of a corporate body, the person or persons signing below must be approved signatories under the terms of the organisation's memorandum and articles of association. We also need to see a list of approved signatories, with the signatures, on the corporate body's headed paper.

## 6 Checklist before submission

Official sealed or certified Grant of Representation (Please refer to the guide for executor and administrators)

Form signed and dated by all executors and administrators