

Department	Contact	Matter
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In order for us to pay your legacy we are required to take a few details from you. All fields must be completed. *Please be assured your contact details will be kept entirely confidential. Our full privacy policy can be viewed <https://www.mogersdrewett.com/privacy-policy/> Paper copies are available on request.

Title		First Name	
Middle Name		Last Name	
Former Name (if applicable)		(Enclose certified copy marriage certificate or change of name deed)	
Home Address: Postcode:		Email:	
Telephone:		Date of Birth:	
National Insurance Number:		Passport Number (If Non-UK Resident):	
Occupation:		Marital Status:	

All payments to beneficiaries are paid by via Bank Transfer. Please note that some banks do charge for this service but that this is out of our control.

For us to make this payment please confirm the following:

Name of account holder:		Name of Bank:	
Address of Bank:		Account Number:	
Sort code:			
Foreign beneficiaries only:	<ul style="list-style-type: none"> • Swift/BIC Number: • IBAN Number: • Currency in which transfer is to be remitted: 		

Once the funds have been transferred to your designated account, they become your responsibility. If you are in receipt of any means tested benefits it is your responsibility to notify any benefits agency of the funds due to you and any payments, you receive.

At Mogers Drewett we understand that receiving an inheritance can be life changing and sometimes overwhelming and so we offer a free, no obligation discussion with one of our financial planners to all our clients and beneficiaries of estates.

If you would like us to arrange for one of our financial planning team to contact you, to answer any questions you may have about your inheritance, or any other aspect of your finances then please let us know.

☐ I would like a call from a financial planner please

☐ I do not wish to be contacted by a financial planner

Please now sign, date, and return the completed form with two forms of identification. For information regarding why we need identification and which documents are acceptable please refer to the attached Anti-Money Laundering Requirements document.

Please note that we cannot proceed until we have seen the original identification documents in your presence or received certified copies. Please do not post original or uncertified copies of your passport or driving license to us.

Signature

Date