

{INCLUDETEXT

"C:\\Users\\CarlyW\\AppData\\Local\\Packages\\PraccticeLimited.OspreyApproachSupervisorApp\_exp2x1s6rv4\\LocalState\\OspreyDocuments\\9ab15dc8-9552-4293-b724-2e83a197904c\\header.doc"}

Our Ref: { MERGEFIELD MATTER\_FEE\_EARNER\_ID }/{ MERGEFIELD client\_no }/{ MERGEFIELD matter\_no }

{ QUOTE { DATE \@ "d" \*Ordinal } } { QUOTE { DATE \@ "MMMM yyyy" } }

{ MERGEFIELD "FW\_PROBSOC3\_FWB\_SOC\_9\_name" }  
{ MERGEFIELD "FW\_PROBSOC3\_FWB\_SOC\_9\_address" }

Dear Sirs

**Deceased:** { MERGEFIELD  
FW\_PRODCDETS 1 DECEASED FULLNM }  
**Account Number[s]:** { MERGEFIELD FW\_PROBSOC3\_FWB\_SOC\_9\_AC 1 \f",  
"} { MERGEFIELD FW\_PROBSOC3\_FWB\_SOC\_9\_AC 2  
\f", " } { MERGEFIELD  
FW\_PROBSOC3\_FWB\_SOC\_9\_AC 3 \f", " } {  
MERGEFIELD FW\_PROBSOC3\_FWB\_SOC\_9\_AC 4 }  
**Address:** { MERGEFIELD  
FW\_PRODCDETS 1 FWDCD\_PRV\_ADD1 \f", " } {  
MERGEFIELD  
FW\_PRODCDETS 1 FWDCD\_PRV\_ADD2 \f", " } {  
MERGEFIELD  
FW\_PRODCDETS 1 FWDCD\_PRV\_ADD3 \f", " } {  
MERGEFIELD  
FW\_PRODCDETS 1 FWDCD\_PRV\_ADDPC }  
**Date of Death:** { MERGEFIELD FW\_PRODCDETS 1 FWDCD\_DT\_DTH  
\@ "d" \*Ordinal } { MERGEFIELD  
FW\_PRODCDETS 1 FWDCD\_DT\_DTH \@ "MMMM  
yyyy" }

We have been instructed by the Personal Representatives in the administration of the estate of the above named deceased. Please find enclosed a death the details of which should be noted and the certificate returned. [We also enclose the passbook[s] for updating.] Please forward all future correspondence to us.

Please let us have the balance of the account[s] as at the date of death together with details of any unpaid accrued interest and please indicate whether any such accrued interest is payable net or gross of tax. Please also let us have details of any other accounts held by the deceased and let us know whether the deceased had any items held with you in safe deposit.

Please provide a copy of any direct debit and standing order instructions, and confirm in writing that these have been cancelled as from the date of death

[Please confirm that any accounts held jointly with the deceased's spouse are now in the sole name of the surviving spouse.]

To enable us to settle the deceased's income tax affairs to the date of death please let us have s352 Certificates detailing the interest paid, and tax deducted for period 6<sup>th</sup> April {

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MERGEFIELD fssm\_Prob\_Tax\_Year } to the date of death as well as the last two complete tax year for each account.

When replying, please also supply us with the necessary claim forms for completion by the Personal Representatives.

Yours faithfully

**{ MERGEFIELD PRACTICEINFO\_PRACTICE\_NAME\\*UPPER }**