Bank bereavement follow up sheet

Track each bank separately and use its official bereavement route. This sheet is not authority to withdraw money, close an account or act for the estate.

1. Bank and account type

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2. Official bereavement route used

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3. Notification date and reference

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4. Documents the bank requested

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5. Joint account or payment question

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6. Confirmed next step and follow up date

Use one sheet for each case. Mark missing information as open and identify who will follow up. Check the guidance before acting.

This is a planning aid, not an official form. Save your own copy and share only the information that is needed.