Declaration proving representation

CFO 209
(12.11)

You must complete this form if you have obtained a grant of representation to the estate. A grant is required for estates of £5,000 and over.

Securities: If the fund includes security holdings you must complete form CFO SST1 to indicate whether they are to be sold, transferred or part sold/part transferred. If the security held is the Equity Index Tracker Fund these units must be sold and cannot be transferred. The completed form CFO SST1 must be attached to this form.

Full name of the deceased

Case number

CFO account number

Date of death

A certified copy of the death certificate must be attached to this form, unless you have already provided it to the Court Funds Office.

Date of the grant of representation

A sealed copy of the grant of representation must be attached to this form.

Case relates to a ☐ **Court of Protection client** ☐ **Child** ☐ **Protected beneficiary**

Full names of the personal representatives:

1)

2)

3)

4)

Bank account details for payment

Name of bank

Address

Postcode

Account name

Account no.

Sort code

If payment is to be made to a bank outside of the UK

Iban no.

Swift/BIC code

continued overleaf ➥

How to contact the Court Funds Office

Customer Helpline

0845 223 8500

Email

enquiries@cfo.gsi.gov.uk

Address

Court Funds Office
Glasgow
G58 1AB

Court Funds Office
DX 501757
Cowglen

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This form must be signed by a personal representative. If there is more than one representative a letter of consent must be signed and dated by the remaining representatives and attached to this form. If a representative has died since the grant was issued, a certified copy of the death certificate must be attached to this form.

Unless the form is signed by a solicitor, the form must be signed in the presence of a witness, who has known you for at least two years and is a professional person or a person of standing in the community. Please see the enclosed list of acceptable witnesses before selecting someone to witness your form. The witness must **not** be a relative of yours.

Where applicable, the letter of consent must also be signed in the presence of an acceptable witness.

Signed

Date

Name

Address

Telephone no.

Postcode

Signature of witness

The witness should know the payee personally and be a professional person or a person of standing in the community. It must not be signed by a relative of the payee. See below for list of acceptable witnesses.

I certify that the person has signed the form in my presence.

Signed

Date

Name

Address

Occupation

Postcode

List of acceptable witnesses

Accountant
Airline pilot
Articled Clerk of a limited company
Assurance agent of recognised company
Bank/Building Society official
Barrister
Chairman/Director of limited company
Chiropodist
Commissioner of Oaths
Councillor (local or county)
Civil Servant (permanent)
Dentist
Director/Manager of a VAT-registered charity
Director/Manager/Personnel Officer of a VAT-registered company
Doctor
Engineer (with professional qualifications)
Financial services intermediary (eg. a stockbroker or insurance broker)
Fire service official
Funeral director
Insurance agent (full time) of a recognised company
Journalist
Justice of the Peace
Legal secretary
(fellow or associate member of the Institute of Legal Secretaries and PAs)
Licensee of public house
Local Government Officer
Manager/Personnel Officer (of a limited company)
Member, associate or fellow of a professional body
Member of Parliament
Merchant Navy officer
Minister of a recognised religion (including Christian Science)
Nurse (RGN and RMN)
Officer of the armed services (active or retired)
Optician
Paralegal (certified paralegal, qualified paralegal or associate member of the Institute of Paralegals)
Person with honours (an OBE or MBE, for example)
Pharmacist
Photographer (professional)
Police Officer
Post Office official
President/Secretary of a recognised organisation
Salvation Army officer
Social worker
Solicitor
Surveyor
Teacher, lecturer
Trade union officer
Travel agent (qualified)
Valuer or auctioneer
(fellows and associate members of the incorporated society)
Warrant Officers and Chief Petty Officers