

Declaration proving representation

CFO 209
(01.19)

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

Account name

Address

Account no.

Sort code

Postcode

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

0300 0200 199

Email

enquiries@cfo.gsi.gov.uk

Address

Court Funds Office Court Funds Office
Sunderland DX 328004
SR43 3AB Sunderland 19

For full details of how your information is used please see our privacy notice at <https://www.gov.uk/government/collections/court-funds-office-forms> or contact CFO who will provide you with a copy.

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 and dated** in the presence of an acceptable witness.

Signed	<input type="text"/>	Date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Name	<input type="text"/>	Address	<input type="text"/>
Telephone no.	<input type="text"/>	Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

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 over the page for list of acceptable witnesses and tick the appropriate box.**

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

Signed	<input type="text"/>	Date	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Name	<input type="text"/>	Address	<input type="text"/>
Occupation	<input type="text"/>	Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

List of acceptable witnesses

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