

## Fundsmith Small Estate Form

*This form is to be used when the value of the deceased client's account is below £20,000 and is to be completed by the personal representatives or, if the deceased did not make a will, the individuals who have the legal right to act on behalf of the estate, usually the next of kin. The Small Estate Form is to be completed where Grant of Probate or Grant of Letters of Administration (referred to generally below as Grant of Representation) are not being applied for.*

- Please complete this form in black ink using **BLOCK Capitals**.
- The signing of the form will need to be witnessed by either a Solicitor, Commissioner of Oaths, Notary Public or a Justice of the Peace.
- Please return the original wet ink form to us by post to **Fundsmith LLP, PO Box 10846, Chelmsford, CM99 2BW**.
- If you are using a courier or sending the form from overseas please send to **Fundsmith LLP, Adams House, 2 Springfield Lyons Approach, Chelmsford, Essex, CM2 5LG**.

**Please note** that completion of this form alone does not automatically effect a sale or transfer of the deceased's shares. Please refer to the Fundsmith Bereavement Guide for more information in relation to the process. If you have any questions regarding this form or would like to discuss any other matter, our team is available to assist you. You can reach us using any of the following:

- **Webchat:** Visit our website to connect with a member of our team.
- **Phone:** 0330 123 1815 (or +44 1268 448659 if calling from overseas) or;
- **Email:** enquiries@fundsmith.co.uk

Details of the deceased											
Title	Surname										
Forename(s)	Date of death <table border="1"><tr><td>D</td><td>D</td><td>/</td><td>M</td><td>M</td><td>/</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	/	M	M	/	Y	Y	Y	Y
D	D	/	M	M	/	Y	Y	Y	Y		
Existing Fundsmith account number (if available)											
Address											
	Postcode										

Personal representatives details	
First-named or sole executor or next of kin	
Title	Surname
Forename(s)	Telephone
Relationship to the deceased	
Address	
	Postcode
Second-named executor or next of kin	
Title	Surname
Forename(s)	Telephone
Relationship to the deceased	
Address	
	Postcode

If there are more than 2 executors or next of kin, please add their details on a separate sheet.

Declaration

I/We, the personal representatives whose details are set out above do solemnly declare that:

- I/We are legally entitled to administer the deceased’s estate.
- The total value of the deceased’s Fundsmith holdings is below £20,000.
- There is no inheritance tax payable in connection with the estate of the deceased.
- I/We have not and do not intend to apply for a Grant of Representation and to the best of my/our knowledge no other person has or intends to apply for one in connection with the estate.
- I/We have or will discharge all debts and expenses of the estate.
- I/We make this solemn declaration conscientiously believing it to be true and by virtue of the Statutory Declarations Act 1835.

Identity verification

We are required to verify the identity of investors and beneficial owners in order to meet our regulatory obligations. This involves obtaining independent documentary evidence confirming identity and permanent residential address. This may involve an electronic check of information. By signing this Small Estates Form you acknowledge that Fundsmith will process any personal data that is provided or is otherwise obtained in connection with this process in accordance with our data protection policy. Our data protection policy is set out in the Supplementary Information Document, available on our website. We reserve the right to request further information or documentation if required.

IN CONSIDERATION of you recording my/our name(s) as Personal Representative(s) of the Deceased without production of a Grant of Representation and accepting instructions from me/us in relation to the deceased’s Fundsmith account set out above, I/we, do hereby agree to indemnify you and keep you indemnified from and against all losses, damages, costs and expenses which you may sustain, incur or be liable to in consequence of your so doing.

Signed by executor or next of kin (First)

Name

Date

Declared at

Address

Postcode

Official stamp

Before me, signed by

Name

Date

☐ Solicitor

SRA reference

☐ Commissioner of Oaths☐ Notary Public☐ Justice of the Peace

Signed by executor or next of kin (Second)

Name

Date

Declared at

Address

Postcode

Official stamp

Before me, signed by

Name

Date

☐ Solicitor

SRA reference

☐ Commissioner of Oaths☐ Notary Public☐ Justice of the Peace