

M&G Withdrawal Form

For Executor/Personal Representative Use Only

This form can be used to redeem part or all of the deceased persons holding(s) with M&G.

Please note that the proceeds of your shares cannot be paid until the form has been completed and signed by all Executors/Personal Representatives and received at the address specified overleaf.

Please complete this form in blue or black ink, using CAPITAL letters and ticking the appropriate boxes.

1 Registered details of the deceased person

Mr Mrs Miss Ms Other

Forename(s) Surname

Address

Postcode

Country

M&G Client Reference Designation (if applicable)

2 Executor/Personal Representative details

First Executor/Personal Representative

Mr Mrs Miss Ms Other

Forename(s) Surname

Address

Postcode

Country

Phone: Home Work

Mobile Email

Second Executor/Personal Representative (if applicable)

Mr Mrs Miss Ms Other

Forename(s) Surname

Address

Postcode

Country

Phone: Home Work

Mobile Email

Third Executor/Personal Representative (if applicable)

Mr Mrs Miss Ms Other

Forename(s) Surname

Address

Postcode

Country

Phone: Home Work

Mobile Email

2 Executor/Personal Representative details (continued)

Fourth Executor/Personal Representative (if applicable)

Mr Mrs Miss Ms Other

Forename(s)		Surname	
Address			
		Postcode	
Country			
Phone: Home		Work	
Mobile		Email	

3 Shares to be sold

In the product type field, please enter one of the following: ISA, Ex Mini ISA, Ex PEP ISA, APS ISA, OEIC or Savings Plan.

Please contact the **Customer Relations** team on **0800 390 390** for information on the M&G holdings.

To highlight the number of shares you wish to sell, please complete either the 'Number of shares to be sold' column or the 'Amount you wish to raise' column below.

Product type	Full name(s) of fund(s)	Share class (eg A, A-H)	Share type Delete as appropriate	Number of shares to be sold, or write ALL	OR Amount you wish to raise
	M&G	Fund	Income/Accumulation		£
	M&G	Fund	Income/Accumulation		£
	M&G	Fund	Income/Accumulation		£
	M&G	Fund	Income/Accumulation		£
	M&G	Fund	Income/Accumulation		£
	M&G	Fund	Income/Accumulation		£
	M&G	Fund	Income/Accumulation		£
	M&G	Fund	Income/Accumulation		£
	M&G	Fund	Income/Accumulation		£

Note: Please use another sheet of paper if you need more space to list your choice of funds.

4 How/Where do you want your money paid?

Cheque made payable:

- To the first Executor/Personal Representative completing this form and sent to them.
- To the notifying Solicitor and sent to them.

Reinvest the sale proceeds into:

- An M&G Additional Permitted Subscriptions (APS) ISA – please enclose a completed M&G Additional Permitted Subscriptions (APS) ISA application form.
- An M&G ISA – please enclose a completed M&G ISA application form.
- An M&G Savings Plan – please enclose a completed M&G Savings Plan application form.

Directly to Executor/Solicitors:

- Directly to Solicitor(s) client money UK bank account – please complete the UK bank details in the boxes provided on page 3. Please note your solicitor must be registered to accept client money.
- Directly to Executor(s) UK bank account – please complete the UK bank details in the boxes provided on page 3. If this option is chosen, in order for us to verify that this bank account is in the name of the Executor, we must see an original of a void cheque* or an original bank statement** dated within the last three months. Your statement will be returned to you.

If the recipient does not hold a UK bank account and does not wish to receive a cheque please call our **Customer Relations** team on **0800 390 390**.

*To void a cheque please cross through and write 'void' across the cheque.

** We are unable to accept a statement printed directly from the internet.

4 How/Where do you want your money paid? (continued)

Name and full postal address of bank or building society

Bank or building society name
Address
Postcode

Bank or building society account number

--

Branch sort code

--

Building society reference/roll number (if applicable)

--

Account name

--

Proceeds will normally be paid/released on the third business day (no later than five business days for ISAs) following receipt of all documents. Please ensure that you check the details carefully before submitting this form as M&G cannot be held responsible for sending money to an incorrect bank account number provided by you.

5 Declaration

Executors/Personal Representatives must sign this section and state their capacity.

I/We the Executors/Personal Representatives hereby acknowledge that I am/we are no longer interested in the shares to which this Withdrawal Form relates and authorise payment in Section 4.

First Executor/Personal Representative

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Capacity

Second Executor/Personal Representative (if applicable)

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Capacity

Third Executor/Personal Representative (if applicable)

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Capacity

Fourth Executor/Personal Representative (if applicable)

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Capacity

! Returning your form

Please send your completed application form to:

M&G Group, PO Box 9039, Chelmsford CM99 2XG

- Section 5: have all Executors/Personal Representatives stated the capacity in which they are signing?
- Have you completed section 4? If not, as a default option a cheque will be made payable and sent to the first Executor/Personal Representative
- Have you included the relevant completed application form if you are using the proceeds of the withdrawal for a new M&G investment?

How to contact us

Call us

 **0800 390 390**

We are open Monday to Friday from 08:00 to 18:00 and on Saturday from 09:00 to 13:00. For your security and to improve the quality of our service, we may record and monitor telephone calls.

Visit our website


 **www.mandg.co.uk**

Email us

 **info@mandg.co.uk**

Please note that information in an email cannot be guaranteed as secure. Do not include sensitive information in emails to M&G.

Write to us

 **M&G Customer Relations
PO Box 9039
Chelmsford
CM99 2XG**

