

**NB. One form per beneficiary must be completed****Estate of**

Name	Civic registration number
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**Beneficiary**

Name	Civic registration number
Email address	Tel. no. (incl. area code)

- In order to receive funds from the deceased, you are required to hold an equivalent/similar fund at Handelsbanken.
- If you are to receive the holdings of the deceased's investment savings account, you are required to hold an investment savings account at Handelsbanken.
- If you are to receive the holdings of the deceased's custody account or securities account, you are required to hold an custody account.
- If the estate has loans from Handelsbanken, these must be managed before the estate can be distributed.

**1. Beneficiary's bank details****Accounts**

Clearing number	Account number / complete form A 147 for accounts in other countries	Bank
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**Funds** (if funds are to be received, the beneficiary must have/open an equivalent fund at Handelsbanken.)

All funds shall <input type="checkbox"/> Be sold <input type="checkbox"/> Transfer to parties to the estate <input type="checkbox"/> Other: _____	
If the funds shall be sold, the sale will be executed at the market price prevailing on the distribution date. The distribution date is the date on which Handelsbanken transfers ownership of the estate to the beneficiaries, which does not correspond to the date on which Handelsbanken receives the estate distribution.	
If funds are to be retained, they will be transferred to the equivalent fund account at Handelsbanken held by the beneficiary. If any fund is to be transferred to a specific fund account, e.g. if the beneficiary has two holdings of the same fund, please confirm this below.	
If the beneficiary is a Handelsbanken customer with approved KYC information, but is lacking the fund accounts to be transferred, Handelsbanken is assigned to open the equivalent fund accounts with Handelsbanken on behalf of the beneficiary.	
The beneficiary thereby approves the terms and conditions (V100) applying to Trade in Handelsbanken's Non-Complex Funds, and consents to agreements, terms and conditions and fund fact sheets being sent thereafter to the beneficiary's registered address.	
Fund name / fund account number	Bank Handelsbanken

**Equities**

All equities shall <input type="checkbox"/> Be sold <input type="checkbox"/> Transfer to parties to the estate <input type="checkbox"/> Other: _____	
If equities shall be sold, the sale will be executed at the market price prevailing on the distribution date. The distribution date is the date on which Handelsbanken transfers ownership of the estate to the beneficiaries, which does not correspond to the date on which Handelsbanken receives the estate distribution.	
Custody account number	Bank

**ISA holdings** (if funds/equities in an ISA are to be received, the beneficiary must have/open an ISA with the equivalent fund accounts at Handelsbanken.)

All equities shall

☐ Be sold      ☐ Transfer to parties to the estate      ☐ Other: \_\_\_\_\_

If equities shall be sold, the sale will be executed at the market price prevailing on the distribution date. The distribution date is the date on which Handelsbanken transfers ownership of the estate to the beneficiaries, which does not correspond to the date on which Handelsbanken receives the estate distribution.

If the beneficiary is a Handelsbanken customer with approved KYC information, but is lacking the fund accounts to be transferred, Handelsbanken is assigned to open the equivalent fund accounts with Handelsbanken on behalf of the beneficiary.

The beneficiary thereby approves the terms and conditions (V100) applying to Trade in Handelsbanken's Non-Complex Funds, and consents to agreements, terms and conditions and fund fact sheets being sent thereafter to the beneficiary's registered address.

Custody account number

Bank

Handelsbanken

## 2. The estate's loan/account details

**The estate's loans** (A mortgage must be fully redeemed or transferred before any distribution of assets from the estate can take place)

Shall loans from Handelsbanken be redeemed?

☐ Yes, all loans shall be redeemed      ☐ Yes, some loans shall be redeemed

Loan no: \_\_\_\_\_

Loan no: \_\_\_\_\_

☐ No, the loans will be transferred

☐ If you wish to become the sole borrower on a joint mortgage loan following the death of your co-borrower, log in to the Bank's website and apply for a mortgage transfer

☐ No, other reason  
Please state reason: \_\_\_\_\_

## The estate's accounts

Shall any account remain open, e.g. for the payment of tax? If the box is not checked, all empty accounts will be closed

Amount to be retained, if any

☐ Yes, account no: \_\_\_\_\_

## 3. Account details for joint account with the estate, if any

The undersigned joint account holder authorises Handelsbanken to

☐ Close the joint account with the estate, and

☐ Distribute the remaining holdings equally between the account holders

☐ Other distribution: \_\_\_\_\_

Place, date

Joint account holder's signature

Print name

ID document (to be completed by bank branch)

ID document (to be completed by bank branch)

**I hereby confirm that the information provided above is correct and that all account details correspond to the beneficiary**

## Beneficiary's signature

Place, date

Signature

Print name