

All information is required unless stated.

Please use this form to indicate how you would like us to handle the cash and investment holdings held solely in the deceased's name. Our aim is to keep the process simple.

What to expect

- Once we receive your completed form, OCBC will review your submission. Subject to verification and processing within the Bank's business hours, we will:
 - Act on your instructions for any cash balances held in the deceased's investment account.
 - Sell the investment holdings at prevailing market prices, depending on the type of asset. For certain investment types, our staff may contact you if we require further information; and
 - Close the relevant accounts once all balances have been withdrawn, transferred, or fully zeroised.
- To enable us to process the liquidation and crediting of proceeds efficiently, Executor(s)/ Administrator(s) are requested to hold an OCBC Bank account, preferably an estate account, for this purpose.
- Please submit the original copies of the **mandatory documents** listed below together with this form.

If you are the Executor(s)	If you are the Administrator(s)	If you need more information about probate application, you can visit online materials recommended by government agencies:
<ol style="list-style-type: none"> Grant of Probate Schedule of Assets Death certificate of deceased IDs of Executors 	<ol style="list-style-type: none"> Letter of Administration Schedule of Assets Death certificate of deceased IDs of Administrators 	<ol style="list-style-type: none"> My Legacy@LifeSG https://mylegacy.life.gov.sg SG Courts - Probate and administration https://www.judiciary.gov.sg/family/probate-and-administration

Please note:

- Once all required documents and signed forms are received, our bank staff may contact you for clarification or further instructions. These follow-ups may be conducted through recorded phone calls in line with the Bank's procedures.
- For deceased customers with only savings, current and/ or time deposit accounts (no investments)** - This form is not required. This also applies to customers who held only cash or time deposits within a Wealth Account (for Premier Banking and Premier Private Client customers). Instead, you may rely on the Multiple Deposit Account Closure Form to provide cash withdrawal and account closure instructions. The same mandatory documents listed above will still be required.
- For deceased customers under Premier Banking or Premier Private Client** - The Wealth Account should be closed only if it is the last remaining account under the deceased's name, to avoid disruption to the monthly Wealth Report, which requires an active Wealth Account to generate statements.
- For other products and services not listed in this form** (e.g. termination of credit cards, safe deposit boxes), please approach our bank staff for assistance for the relevant forms.
- For Great Eastern and OCBC Securities products** – Please refer to their respective handling procedures for more information.

1 Details of deceased person

Name ▶ *As in death certificate*

NRIC/Passport number

2 Details of Executor/Administrator

Applicant 1

Applicant 2

Applicant 3

Name ▶ *As in NRIC/Passport*

Date of birth ▶ *DD/MM/YY*

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Occupation

ID Type

- Identity Card
 Passport
 Others [please specify]

- Identity Card
 Passport
 Others [please specify]

- Identity Card
 Passport
 Others [please specify]

ID Number

Relationship with deceased

<input type="checkbox"/> Spouse	<input type="checkbox"/> Spouse	<input type="checkbox"/> Spouse
<input type="checkbox"/> Child	<input type="checkbox"/> Child	<input type="checkbox"/> Child
<input type="checkbox"/> Parent	<input type="checkbox"/> Parent	<input type="checkbox"/> Parent
<input type="checkbox"/> Sister	<input type="checkbox"/> Sister	<input type="checkbox"/> Sister
<input type="checkbox"/> Brother	<input type="checkbox"/> Brother	<input type="checkbox"/> Brother
<input type="checkbox"/> Others	<input type="checkbox"/> Others	<input type="checkbox"/> Others

Residential address

Postal Code Postal Code Postal Code

Mailing address Postal Code

Mobile + [country code] – [area code, for foreign numbers] – [contact number]

+ – – + – – + – –

Home + [country code] – [area code, for foreign numbers] – [contact number]

+ – – + – – + – –

Office + [country code] – [area code, for foreign numbers] – [contact number]

+ – – + – – + – –

Document Details – If you are the Executor / Administrator

Letter of Administration / Grant of Probate Dated / /
 ▶ DD/MM/YY

Letter of Administration/ Grant of Probate Number

Death Certification Dated / /
 ▶ DD/MM/YY

3 Account instructions

Please provide the deceased's **savings and current account numbers** for withdrawal of cash.
 Please note that early withdrawal of time deposits may incur a penalty.

Saving and Current Account including time deposit account State account number below

Account 1

Account 2

Account 3

Other Accounts

Please provide the deceased's **investment account numbers** for sale or transfer of the investment holdings.

State account number below

Blue Chip Investment Account

Precious Metals Account

RoboInvest Account

Structured Deposit Account

Please note that a pre-withdrawal penalty fee may apply for early termination of structured deposits.

Unit Trust Account _____

Wealth Account _____

▶ For Premier and Premier Private Client only

If the deceased held investments under a Wealth Account, we will notify the assigned Relationship Manager (RM). The RM will contact you directly to guide you through the next steps and provide any assistance required.

If you are an existing Premier Banking or Premier Private Client customer and wish to **transfer the deceased's investment holdings to your own OCBC Wealth Account**, you can also indicate this to the same RM, who will assist you with the transfer process.

Tick here if you wish to transfer the deceased's investment holdings to your own OCBC Wealth Account.

Please note the transfer process and timeframe may vary depending on the type of investment. Additional instructions or supporting documents may be required from you to complete the transfer.

Other Accounts ▶ State account type and number here _____

Instructions and Acknowledgment – Sale of Investment Holdings and Handling of Cash Balances

I/We hereby provide my/our consent and instructions for OCBC to act on the stated savings accounts, current accounts, and investment accounts that I/we have indicated in this form, and to proceed as follows:

1. Sell all investment holdings and credit all cash proceeds (if any) into the OCBC account that I/we have provided below.

OCBC Account Number ("Crediting Account"): _____

2. Withdraw and transfer the cash balances from the stated savings and current accounts into the same OCBC account provided above.

Once the instructions in Step 1 and 2 have been completed and all proceeds have been credited into the above account and if there is no further need for this account, you may choose to authorise the Bank to close the account (applicable only if it is held in the deceased's sole name) by completing the section below.

Closing of Crediting Account

Tick if you would like the Bank to close the above OCBC account (held in the deceased's sole name) after all proceeds from the accounts listed in this form have been credited into it.

I/We authorise you to close the above-mentioned crediting account and refund the sums from the stated account as per my/our selection below:

Select one of the following:

Transfer to my/our OCBC account number: _____

Send a Cashier's Order¹ payable to (select one only):

Deceased's name

Applicant 1 Applicant 2 Applicant 3 Others [please specify]: _____

The Cashier's Order¹ will be mailed to the mailing address stated in this form. Please select one mailing method

Normal Post Registered Post²

¹ A Cashier's Order will only be issued if your credit balance is more than S\$15. For credit balances less than S\$15, please withdraw at any OCBC Bank branch or via OCBC Online Banking.

² The prevailing cost for local registered post will be deducted from the account prior to closure. If the postal address is outside Singapore, registered postage charges based on rates will apply. If there are insufficient funds, the Cashier's Order will be sent by normal post.

4 Applicant Acknowledgment

By signing this form, you acknowledge and confirm that:

1. I/we am/are fully authorised to act on behalf of the deceased as a personal representative or assignee of the deceased.

2. Market prices of the investment(s) may fluctuate, and there is no guarantee that the market price on the day of my/our submission of this form will be the actual price used for calculation of my/our reception proceeds. Accordingly, the Bank will not be responsible for any losses arising from the sale.

3. Depending on the investment type, OCBC staff may contact me/us if further clarification or instruction is required. These follow-ups may be carried out through recorded phone calls in line with the Bank's procedures.

4. The Bank shall be entitled to set-off the amount to be withdrawn against any monies outstanding under the deceased's overdraft facility with the Bank (if any) and any charges imposed by the Bank (if applicable).
5. The sale of investment holdings and the crediting of proceeds may take time to complete, and timelines will vary depending on the type of asset.
6. Once all investment holdings have been sold and all proceeds have been credited or transferred, the Bank will proceed to close the relevant investment accounts.
7. I/We also fully understand that the Bank reserves the right to reject an application for any reasons.
8. I/we agree to the Terms and Conditions governing Deposit Accounts, Terms and Conditions governing Investment Services or OCBC Premier Banking and OCBC Premier Private Client Terms and Conditions (as applicable and as may be amended from time to time).
9. I confirm that all the information I/we have provided is true, accurate and complete and I have not withheld any information. I/we undertake to keep OCBC Bank informed in writing within 30 days, of any changes in circumstances that may cause any of the information in this application to become incorrect or incomplete and also undertake to provide any additional information as may be required by OCBC Bank and/or applicable law.
10. I/ we agree and undertake that I/we fully indemnify OCBC Bank and keep OCBC Bank indemnified against all liability in respect thereof and against all suits, actions, proceedings, claims, demands, losses, damages, costs and expenses, whatsoever or howsoever arising which may be taken or made against OCBC Bank or incurred or become payable by OCBC Bank in respect hereof. And I /we further agree that my liability shall be a continuing liability and shall remain in full force and effect.
11. I/we consent to the collection, use, disclosure, and processing of my/our personal data by OCBC and its related corporations (collectively, "OCBC Group") for the purposes of processing and fulfilling my/our request, and for other applicable purposes as set out in OCBC's Data Protection Policy (available at OCBC Website > Personal Banking > Policies) (the "Purposes"). Where I/we have provided the personal data of other individuals, I/we confirm that I/we have obtained consent from such individuals for the collection, use, disclosure and processing of their personal data by OCBC Group for the Purposes.

Signature of Applicant 1
Date ▶ DD/MM/YY <input type="text"/> / <input type="text"/> / <input type="text"/>

Signature of Applicant 2
Date ▶ DD/MM/YY <input type="text"/> / <input type="text"/> / <input type="text"/>

Signature of Applicant 3
Date ▶ DD/MM/YY <input type="text"/> / <input type="text"/> / <input type="text"/>

For OCBC Bank's use

Branch /BU Use

Processed By/ Date	Verified/ Authorised By/ Date	Department Name	Remarks