

Application for Deceased Claim from Legal Claimant
[Holder of Succession Certificate, or Letter of Administration, Court Order or Probate of Will]

From

To

The Branch Head
Axis Bank Ltd.

_____ Branch

Dear Sir,

Re: Deceased Account

Late Shri/Smt. _____
Account No(s)

Term/Fixed Deposit No(s)

I/We advise the demise of Shri/Smt. _____ on _____. He/she, they hold the above account(s)/term/fixed deposit(s) at your branch. The account(s)/term/fixed deposit(s) is/are in the name(s) of _____ with MOP as _____.

I/We submit photocopy of the following document(s) together with originals. Please return the original to us after verification.

- i. Death Certificate issued by _____
- ii. Identity proof (required in nomination cases) _____

I, _____ son/ daughter/ Wife of Shri _____ residing at _____ hereby declare that I have received the legal representation from the appropriate authority entitling me to receive from your Bank the balance(s) in the account(s) with the Bank in the name of _____, the deceased.

I/We lodge my / our claim for the above balances with accrued interest of the above-named deceased in terms of legal representation by way of: **(Select whichever is applicable)**

Will of the late Shri / Smt. / Kum. _____ dated _____ and a Probate granted by the Court of _____ at _____ dated _____ **(Copy enclosed).**

Succession Certificate dated _____ granted by the Court of _____ at _____ **(Copy Enclosed).**

Letters of Administration No _____ dated _____ issued
by _____ Court of _____
_____ at _____ **(Copy enclosed).**

Court order No _____ dated _____ issued by
Court of _____ at _____ **(Copy enclosed).**

Accordingly, I hereby submit my claim and furnish the requisite particulars / documents for deceased claim settlement for payment as per the Bank's rules & discretion.

I am / We are aware that the deceased holder had certain outstanding amounts ("Outstanding Dues") payable to the Bank in relation to certain credit facilities availed by him/ her and/ or certain other dues payable to the Bank. I / We hereby authorise the Bank in exercise of its right to lien and set-off in accordance with the terms of the loan agreement executed, to deduct the Outstanding Dues from the total available balance held by the deceased holder in the aforesaid account(s)

Pay the Proceed by:-

DD	to	be	issued	in	favour	of:

or						
A/c	No		for	fund		Transfer:

I/We lodge our deceased claim settlement for payment as per the Bank's rules & discretion.

My/our contact details is/are as below:

Name of the Claimant : _____
Mobile Number of Claimant : _____
Email id of Claimant : _____

I hereby authorise Bank to send communication regarding claim settlement related to above mentioned account(s) to my contact number/email id mentioned herewith.

I/We hereby solemnly affirm that the above statements are true and correct to the best of my/our knowledge and belief.

Place: _____

Yours faithfully,

Date: _____

(Claimant(s))

For Office Use

Documents Received Date: - _____

Name of Customer (Deceased): _____ **CIF:**

Date of Death: _____ Date of Intimation to Bank: _____

Name of Claimant(s): _____

Certification by Branch Head:

Certified that due diligence and discrete enquiry have been made to identify the claimant(s).

All the documents have been verified with the original (wherever applicable).

Branch has done discreet enquiry about the genuineness of the order and certified copy of the Order.

- Claimant name as per system is _____ and as per OVD proof is _____, Due diligence is done, and we confirm that both the persons are same.(in case of name mismatch)
- Deceased name as per system is _____ and as per Death Certificate is _____, Due diligence is done, and we confirm that both the persons are same. (in case of name mismatch)

Signature:

Signature:

(Sign Verification / Prepared by BOH)

(Approved by Branch Head)

Grade:

Grade:

Employee code:

Employee code:

Documentation required for Deceased Claim Settlement

Deceased claim settlement through legal representation	Death Certificate Probated will/Succession Certificate/ Court Order/ Letter of Administration Received Claim Form (Annexure- 4 A) OVD of Claimant/s SB Account Closure Form In case of FD, FD Receipt or FD advice(as applicable) signed by claimant/s Annexure - 7 Receipt – To be collected from claimant once the settlement is done.
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