

## Requirements for submitting a Deceased Application

Deceased Holding Description <i>Note: ✓ indicates document is required</i>	Notification of Death <sup>1</sup>	Proof of Death <sup>2</sup> (original or certified copy)	Claim Form <sup>3</sup> (Sole Testate, Sole Intestate, Joint, Nomination <sup>6</sup> )	Will - or Certified copy. Solicitors acting in the case can provided a redacted copy.	Grant of Probate <sup>7</sup> (original or certified copy)	Letters of Administration (original or certified copy)	Investment Documents (Cert/Bond/ POSB book –originals)	Proof of Name <sup>9</sup> for Deceased Account Holder	Consent Form <sup>11</sup>	IT8 (Revenue Document) <sup>8</sup>
Sole Testate <sup>4</sup> less than €25,000	✓	✓	✓	✓			✓	✓		
Sole Testate <sup>4</sup> greater or equal to €25,000	✓	✓	✓		✓		✓	✓		
Sole Intestate <sup>5</sup> less than €25,000	✓	✓	✓ – note <sup>10</sup> Indemnity Required				✓	✓	✓	
Sole Intestate <sup>5</sup> greater or equal to €25,000	✓	✓	✓			✓	✓	✓		
Sole - Nomination <sup>6</sup> exists	✓	✓	✓				✓	✓		
Joint (with Spouse only)	✓	✓	✓				✓	✓		
Joint /Trust less than or equal to €50,000	✓	✓	✓				✓	✓		
Joint / Trust greater than €50,000	✓	✓	✓				✓	✓		✓

**Notes:**

1. Notification of Death<sup>1</sup> must include confirmation of the name and capacity of the person(s) the solicitor is representing. In the case of an individual acting in a private capacity (Executor/Administrator/Survivor), a Notification of Death form is available on our website [www.statesavings.ie](http://www.statesavings.ie) or from the Post Office.
2. Proof of Death<sup>2</sup> – original or certified copy of Death Certificate, Letters of Administration, Grant of Probate, Coroners Certificate (acceptable if no death certificate).
3. Claim Form<sup>3</sup>. Once notified An Post will issue the appropriate claim form(s) depending on the ownership structure of the investments held by the deceased.
4. Testate<sup>4</sup> relates to where a valid will exists.
5. Intestate<sup>5</sup> relates to where no valid will exists.
6. Nomination<sup>6</sup> - this is a facility where the account holder has completed An Post nomination form naming person(s) to receive sum on death. Only applies to Deposit Book Based Accounts and Saving Certificates issues 1 to12.
7. If Grant of Probate has been extracted then it must be provided to An Post regardless of the value of the sole accounts held by the Deceased.
8. IT8 – this document is issued by the Revenue Commissioners.
9. Proof of Name<sup>9</sup> one of the following must be provided – original/certified copy of Driving Licence/Passport – if not available sample signatures and proof of Date of Birth will be required. (Sample signatures can be taken from Will or other verified identification documents)
10. Indemnities are incorporated into the An Post claim forms for Sole accounts removing the need for separate Indemnity forms to be issued. Failure to complete the Indemnity panel correctly on the claim form will however result in the issue of a separate Indemnity form for completion which will delay the processing of the case.
11. A Consent form will always be required for Sole cases less than €25,000 where a Will has not been made and there are other persons whose relationship to the deceased entitles them to claim a share of the balance of the accounts held by the deceased.
12. In order to support a claim any additional documentation referencing an account should be provided, this can include account statements etc.
13. A Certified copy is a photocopy of the original document which has been stamped and signed by a Postmaster, Member of An Garda Síochána or practising Solicitor/Commissioner for Oaths to certify that it is a true copy of the original document which they have sighted.