



**BARBADOS PUBLIC WORKERS'
CO-OPERATIVE CREDIT UNION LIMITED**

ESTATE SHARE RECORD FORM

ACCOUNT No.:

PERSONAL INFORMATION

☐ MR. ☐ MRS. ☐ MS. LAST NAME:

FIRST NAME:

MIDDLE NAME(S):

ADDRESS:

DATE OF BIRTH (dd/mm/yyyy)

EMAIL ADDRESS:

TAX IDENTIFICATION NUMBER (TIN):

NATIONAL REGISTRATION No. (or equivalent):

NATIONAL INSURANCE No. (or equivalent):

PHONE (Home)

PHONE (Mobile)

PHONE (Work)

MARITAL STATUS: ☐ MARRIED ☐ SEPARATED ☐ WIDOWED ☐ DIVORCED ☐ SINGLE

NAME OF Executor/Executrix/Administrator/Administratrix:

☐ MR. ☐ MRS. ☐ MS. LAST NAME:

FIRST NAME:

MIDDLE NAME(S):

ADDRESS:

DATE OF BIRTH (dd/mm/yyyy)

EMAIL ADDRESS:

TAX IDENTIFICATION NUMBER (TIN):

NATIONAL REGISTRATION No. (or equivalent):

NATIONAL INSURANCE No. (or equivalent):

PHONE (Home)

PHONE (Mobile)

PHONE (Work)

MARITAL STATUS: ☐ MARRIED ☐ SEPARATED ☐ WIDOWED ☐ DIVORCED INITIAL DEPOSIT: \$ [Must be a minimum of BBD \$100]

DECEASED'S DETAILS:

☐ MR. ☐ MRS. ☐ MS. LAST NAME:

FIRST NAME:

MIDDLE NAME(S):

NATIONAL REGISTRATION No.:

TO THE BARBADOS PUBLIC WORKERS' CO-OPERATIVE CREDIT UNION LIMITED

I/We the qualified acting Executor / Executrix/Executors /Executrices /Administrator /Administratrix/ /Administrators/Administratrices [strike whichever term is inapplicable] HEREBY APPLY to BPWCCUL to establish an Estate Share Record (hereinafter referred to as "the Share Record") for the Estate

of..... late of.....
and agree to observe the following terms of this Agreement:

- Account Restrictions**
- No Automatic Teller Machine Card (ATM"), Telephone Banking or SurePay facility is to be accessible on this Share Record. Online Banking viewing access only will be allowed for this Share Record.
 - Funds on the Share Record may not be used as security by the qualified Agent in support of any loans to be obtained from any financial institution including BPWCCUL.
 - Only cheques issued to the Estate of the deceased can be deposited to this Share Record.
 - Cash deposits will only be permitted where it can be confirmed that the cash proceeds are from sources owing monies to the Estate of the deceased.
 - No Third party withdrawals will be allowed from this Share Record.
 - Funds in this Share Record are not to be used to offset any delinquency on the account of an Executor/Executrix or Administrator/Administratrix.
 - This account record does not facilitate the appointment of a Power of Attorney.

- Withdrawals** - All withdrawals requested will be issued by BPWCCUL via crossed cheques only. Where there is more than one Executor/Executrix or Administrator/Administratrix all parties are to be present to transact business on the Estate Record.
- Expiration** - The Share Record will be held open for one year only unless other written agreement is made between BPWCCUL and the Agent extending this period of operation of the Share Record.
The aforementioned agreement is at the sole and absolute discretion of BPWCCUL.
- Where funds remain on an Estate Share Record after maturity and no extension time is granted by BPWCCUL, a letter accompanied by a crossed cheque in the name of the estate of the deceased person will be sent to the primary account holder and the Share Record shall be terminated.

TO THE EXECUTOR/EXECUTRIX/ADMINISTRATOR/ADMINISTRATRIX:

We collect information about you to maintain a relationship, provide products and services, render credit decisions, market services, comply with the law, and protect you and our interest, and for other compatible purposes. By signing below, you affirm that the information you have given is true and complete. You authorise us to give and obtain information about you to any staffer of the Barbados Public Workers' Co-operative Credit Union Limited and any other person with whom you have financial dealings or as permitted or required by law. You also authorise us to send you information about products of the Barbados Public Workers' Co-operative Credit Union Limited and agree that we may use this information for marketing purposes after the relationship created by this document has end

SIGNATURE OF MEMBER: DATE (mm/dd/yyyy):

SIGNATURE OF MEMBER (where applicable): DATE (mm/dd/yyyy):

THIS ESTATE SHARE RECORD TERMS AND AGREEMENT is made theday of..... 20..... BETWEEN the BARBADOS PUBLIC WORKERS' CO-OPERATIVE CREDIT UNION LIMITED, a Society incorporated under the provisions of the former Act as defined in the Co-operative Societies Act, CAP. 378A of the Laws of Barbados and continued under the provisions of the said Co-operative Societies Act and having its Registered Office situated at "Olive Trotman House", Keith Bourne Complex, Belmont Road in the parish of Saint Michael in this Island (hereinafter called "the BPWCCUL" – which expression shall, where the context admits, include its successors in title) of the ONE PART and I/We.....

AND.....[print full name(s)] of.....

AND..... [insert address(es) the qualified acting Executor / Executrix / Executors / Executrices / Administrator / Administratrix / Administrators / Administratrices [strike inapplicable terms] being over the age of eighteen years/each of us being over the age of eighteen years(hereinafter referred to as "the Agent") of the OTHER PART.

Definition of Terms used in this Agreement:

- Administrator/Administratrix** - A person legally appointed by a court in Barbados or in another jurisdiction to manage and dispose of the estate of an intestate deceased.
- Executor/Executrix** - A person or institution appointed by a deceased person -Testator/Testatrix to manage and dispose of the estate of that deceased person according to the terms of the Will of such deceased person.
- Letters Testamentary** - A document issued by a court in Barbados or a court in another jurisdiction or public official authorizing the Executor(s)/Executrix(Executrices) named in the Will of a deceased person of a will to manage and dispose of the estate of that deceased person according to the terms of the Will of such deceased person.
- Letters of Administration** - A document issued by a court in Barbados or a court in another jurisdiction or public official authorizing the Administrator(s)/Administratrix/ Administratrices named in the Will of a deceased person to manage and dispose of the estate of that deceased person according to the laws of intestacy.
- Agent** - Every Executor/Executrix or Administrator/Administratrix must be a member of Barbados Public Workers' Co- operative Credit Union Ltd. and must be eighteen (18) years or older.
- Documentation** - The Executor/Executrix or Administrator/Administratrix to provide the Original Letters Testamentary or Letters of Administration at the inception of the Estate Record ONLY.

FOR OFFICIAL USE ONLY

NAME OF STAFF MEMBER OPENING ACCOUNT (please print):

SIGNATURE OF STAFF MEMBER OPENING ACCOUNT: DATE (mm/dd/yyyy):

NAME OF STAFF MEMBER VERIFYING ACCOUNT (please print):

SIGNATURE OF STAFF MEMBER VERIFYING ACCOUNT: DATE (mm/dd/yyyy):

Barbados Public Workers' Co-operative Credit Union Limited
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www.publicworkers.bb · E-mail: contact@bpwccul.bb