DEGIRO

Deceased Instructions Form

DEGIRO

Settling the deceased person's brokerage account step by step

Losing a loved one is a traumatic event. As next of kin, there are a great many arrangements you need to make. We will be pleased to help you settle the brokerage account properly.

Step 1: Notify DEGIRO of the death

It's important that you notify us of a death as soon as possible. We can then settle the deceased person's brokerage account carefully and attentively for you.

How can you notify us of the death?

- By emailing our Service Desk: clients@degiro.ie
- By calling our Service Desk: +31 20 261 3072

What do we do once you have notified us?

The process of settling the deceased person's brokerage affairs varies depending on the product and the service. You can read more below about the documents that DEGIRO may request.

Step 2: Documents that DEGIRO may request

- Copy of the original Death Certificate

We need official confirmation that someone has died. We obtain this confirmation from the death certificate, which is issued by the municipal registry of births, marriages, and deaths in the municipality where the death occurred. A copy of the death certificate will suffice for us.

- Copy of the passport or the ID of the deceased client and the heir(s), executor, or the heir with power of attorney.
- Document proving the entitlement of the heir(s) or executor to the estate. This may be a will, a certificate of inheritance, or a similar document according to the Law of the relevant Country.

Step 3: Fill in the Deceased Instructions Form

This form must be completed when you are notifying DEGIRO of the death of a client of DEGIRO and you wish to:

- Have the value of the account transferred to the bank account registered with DEGIRO.
- Have the value of the account transferred to a different bank account.

When this form has been completed it should be scanned and returned to the Service Desk.

2 flatexDEGIRO Bank Dutch Branch, trading under the name DEGIRO, is the Dutch branch of flatexDEGIRO Bank AG. flatexDEGIRO Bank AG is primarily supervised by the German financial regulator (BaFin). In the Netherlands, flatexDEGIRO Bank Dutch Branch is registered with DNB and supervised by AFM and DNB

Deceased Instructions Form

Enter the name and address details below of the deceased client and the heir or executor.

Details of the deceased client

Title ☐ Mr ☐ Mrs/Miss/Ms

First name(s) .....

Surname .....

Date of birth .....

Date of death .....

Username .....

Details of the heir or executor of the will

Title ☐ Mr ☐ Mrs/Miss/Ms

First name(s) .....

Surname .....

Date of birth .....

E-mail address .....

Telephone number .....

Please complete below if there are more than one heir or executor

Title ☐ Mr ☐ Mrs/Miss/Ms

First name(s) .....

Surname .....

Date of birth .....

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E-mail address .....

Telephone number .....

Title ☐ Mr ☐ Mrs/Miss/Ms

First name(s) .....

Surname .....

Date of birth .....

E-mail address .....

Telephone number .....

Title ☐ Mr ☐ Mrs/Miss/Ms

First name(s) .....

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Date of birth .....

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Instructions

Use the below table to indicate how you would like the deceased client's account to be handled. If the below selections are not how you want the account to be dealt with, please contact the Service Desk of DEGIRO who will answer any questions which you may have.

Close any open positions and transfer any cash back to the bank account registered with DEGIRO	☐ Yes
Close any open positions and transfer any cash to a different bank account. Please note this will result in a verification of IBAN, further information can be provided by the Service Desk of DEGIRO.	☐ Yes - please provide the IBAN and details of the account holder below:
Transfer any open positions to another account within DEGIRO. Please note fees may be applied, and that this account should be in the name of the parties mentioned in the will, the certificate of inheritance or similar legal document.	☐ Yes - please specify the username below:

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Signatures

The heir(s)/executor of the account should sign this Deceased Instructions Form.

By signing below, the signatories confirm that they are provided by the deceased client's will to administer the estate, and that the information provided in this form and attached is correct and can be relied upon. Additionally, the signatories accept that the signatories are responsible for any losses or costs which flatexDEGIRO Bank Dutch Branch may incur as a result of acting on the instructions of the signatories, or another person being entitled to the funds or assets paid or transferred. The signatories agree to reimburse flatexDEGIRO Bank Dutch Branch for any losses or costs incurred.

First Signatory

Name .....

Date .....

Signature .....

Second Signatory

Name .....

Date .....

Signature .....

Third Signatory

Name .....

Date .....

Signature .....

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What you should return

- This form, completed in full and signed.
- A signed copy of a valid identity document for each signatory.
- A copy of the death certificate.
- A copy of the certified will, a certificate of inheritance, or a similar document according to the law of the relevant country proving entitlement.

Where you should send the form

You can send the fully completed form by e-mail to: clients@degiro.ie

Please state your name in the subject line of your e-mail message.

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