

Please refer to the instructions at the end of this form, before completing it.

- This form is to be used where the value of the deceased's Jupiter investment at the date of death is less than £20,000. In such instances, it is not necessary for you to obtain Grant of Representation (Grant of Probate/Certificate of Confirmation). Instead, you can use this form for the Jupiter holding.
- Please complete this form in blue or black ink

1 Personal details

I (name)	
of (address)	
Date of birth	Telephone number
I (name)	
of (address)	
Date of birth	Telephone number
do solemnly and sincerely declare that I/we being (relationship)	
of (name of deceased)	
Unitholder numbers(s) (of deceased)	
and the only person(s) entitled to deal with the Estate will administer according to applicable laws the Estate of the deceased which may come into my/our hands.	

2 Declaration

I/We undertake to obtain and to produce to Jupiter Unit Trust Managers Limited (the 'Company') a Grant of Probate/Grant of Letters of Administration should the Company at any time require this document.

In consideration of the Company waiving its requirement for the Grant of Probate/Grant of Letters of Administration and/or the HM Revenue & Customs Capital Taxes Office Letter confirming that no liability to inheritance tax arises in connection with the investment of

Product (<i>Tick where relevant</i>)	
<input type="checkbox"/> Unit Trust/ISA	<input type="checkbox"/> OEIC

(the 'Investment') registered in the name of the deceased (the 'Capital Taxes Office Letter'), I/we jointly and severally agree to indemnify and to keep indemnified in full and on demand from and against all and any losses, costs and expenses (including reasonable legal costs) suffered or incurred by the Company arising out of, or in connection with,

- i) a Grant of Probate/Grant of Letters of Administration not having been produced;
- ii) the Capital Taxes Office letter not having been produced;
- iii) the Company accepting this Indemnity and Declaration as confirmation that no inheritance tax is due in connection with the Investment; and/or
- iv) payments due to the estate of the deceased in respect of the redemption of holdings in the Company;
- v) in the event of legal proceedings against you in connection with any such claim, from time to time upon demand to provide you with any funds you may require to defend such proceedings, and in default of my/our so doing you shall be entitled to admit or settle such proceedings on such terms as you may think fit to recourse to me/us.

I/We make this declaration conscientiously believing the same to be true and by virtue of the provisions of the Statutory Declaration Act 1835.

Declared by the said (<i>name in capitals</i>)		
at (<i>time</i>)	on this (<i>day</i>)	of (<i>month/year</i>)
Signature (1)		
Declared by the said (<i>name in capitals</i>)		
at (<i>time</i>)	on this (<i>day</i>)	of (<i>month/year</i>)
Signature (2)		

3 Certification

Certified and sealed by Notary Public/Justice of the Peace/Commissioner for Oaths or Solicitor

Signature	
Name in capitals	
Capacity	
Address	
Date	

If there are more than 2 additional executors or equal next of kin, please add their details and signatures at the end of the form.

We are required to verify the identity of investors and associated parties, which includes beneficial owners, in order to comply with UK anti-money laundering legislation. This involves obtaining independent documentary evidence confirming identity and permanent residential address. This may involve an electronic check of information. We are required to register one of the above documents, this will give us the right to access such information for the purposes of the General Data Protection Regulation (GDPR). We reserve the right to request further information or documentation if required.

In the case of an estate of a deceased person in the course of administration, the beneficial owner is the executor, original or by representation, or administrator for the time being of a deceased person.

Small Estate Form

Important Instructions to help complete this form



If you need help with this form

- Phone us on **0800 561 4000** (from overseas: **+44(0)1268 448642**) between 9.00am and 5.30pm, Monday to Friday
- Email us at **enquiries@jupiteronline.co.uk**
- Use webchat via our website, **www.jupiteram.com**
- If you want any document in another format (for example Braille, large print or audio), please contact us.

We have a dedicated bereavement team.

Please contact us if you would like to arrange a telephone appointment with a member of the team or if you have any queries.

Advice

We recommend you discuss any investment decisions with a financial adviser, particularly if you are unsure whether an investment is suitable. Jupiter is unable to provide investment advice. You can contact either www.thepfs.org/yourmoney/find-an-adviser/ or www.unbiased.co.uk who will be able to help you find one.

Completing your form

- The deceased's unitholder number and product can be found on correspondence we have sent such as contract notes and bi-annual statements.
- All executors will need to sign the declaration which will then need to be certified by a Notary Public/Justice of the Peace/Commissioner for Oaths or Solicitor
- Please return your completed form to us at **Jupiter Unit Trust Managers Limited, PO Box 10666, Chelmsford CM99 2BG.**