



ESTATE RESOLVE

PROFESSIONAL ESTATE ASSET RESEARCH



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020 8154 2371

AUTHORITY TO ACT

Case Reference: _____

1. DECEASED PERSON

Full Name: _____ Date of Death: _____

Last Known Address: _____

2. AUTHORISING REPRESENTATIVE

☐ Executor ☐ Administrator / Personal Representative ☐ Solicitor

Name: _____

Telephone: _____ Email: _____

3. AUTHORITY & DECLARATION

I authorise Estate Resolve to make enquiries and exchange information with banks, building societies, pension providers, insurers, investment managers, share registrars, National Savings & Investments (NS&I) and other relevant organisations for the purpose of identifying assets and liabilities belonging to the above-named deceased.

- ☒ I confirm that I am entitled to provide this authority and that the information supplied is true and accurate.
- ☒ I authorise Estate Resolve to provide a copy of this signed authority as evidence of its authority to act.
- ☒ I consent to processing of personal information in accordance with UK GDPR.

This authority is valid for 12 months from the date below or until revoked in writing.

Signature: _____ Date: _____

4. DATA PROTECTION

Estate Resolve will process personal data in accordance with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018. Information will only be used for the purpose of carrying out estate asset enquiries and will be kept secure and confidential.

5. DOCUMENTS REQUIRED

Please provide the following documents to support this authority:



Death Certificate



Proof of Identity



Proof of Address



Authority to
Act Form



Will / Probate
documents
if available

Estate Resolve is an estate asset research service. We do not provide legal, probate or financial advice and do not handle client or estate funds.