

DATE OF APPLICATION	MANAGING BRANCH
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**DETAILS OF THE DECEASED**

NAME AND SURNAME	IDENTIFICATION DOC.	DATE OF DEATH
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**APPLICANT'S DETAILS**

NAME AND SURNAME	IDENTIFICATION DOC.	RELATIONSHIP WITH THE DECEASED
ADDRESS		
MOBILE TELEPHONE (*)	E-MAIL (*)	

**REPRESENTED BY**

NAME AND SURNAME	IDENTIFICATION DOC.
MOBILE TELEPHONE (*)	E-MAIL (*)

(\*) If the applicant or his/her representative is a customer of Banca March, the contact details must match those registered in the Bank's systems.

**I REQUEST** (Mark with an "X"):

- Certificate of legal heirs at date of death.
- Certificate of statement of demand accounts for the year preceding the death.

**DOCUMENTATION PROVIDED** (Mark with an "X"):

- Death certificate issued by the Civil Registry.
- Applicant's identification document (if not a Banca March customer).
- Other documents that I am hereby providing:

Documents to be provided if the applicant is being represented:

- Identification document of the representative.
- Power of Attorney or Mandate of the applicant.

By signing this document:

- I declare that I have a legitimate interest in the succession of the above-mentioned deceased person and I request Banca March S.A. to process the will in order to carry out the appropriate transfers and transactions, being authorised to contact me for any relevant questions.
- I hereby declare that I have received the Heir Support Guide from Banca March S.A. and that I have been informed of the eventual accrual of a fee of 100.00 euros plus taxes, for the service of processing the probate file, in the event that a guidance, advisory or any other service is delivered that justifies the accrual of this fee, which Banca March S.A. will receive at the completion of the file. I authorise the collection of the referred amount to be charged to any of the accounts held by the deceased.
- I declare that I have been informed that Banca March will carry out the following actions upon receiving the Death certificate:
  - It will continue to pay the direct debit bills corresponding to utilities (water, electricity, etc.), taxes, insurance, homeowners association and loan instalments, unless there is an express order to the contrary given by all the heirs and, if applicable, the joint holder of the account. Similarly, all direct debits for the payment of expenses that only benefit third parties and do not involve the maintenance of the assets of the estate will only continue to be paid with the consent of all the heirs.
  - Periodic transfer orders will be stopped and will only continue to be honoured with the consent of all heirs.

- It will block all securities accounts held by the deceased, irrespective of whether the deceased shares ownership with other persons and irrespective of the agreed drawdown regime.
- It will stop and cancel the Discretionary Portfolio Management Service.
- It will block credit cards and cancel debit cards and the remote banking card.
- It will remove the authorised persons and/or representatives (attorneys-in-fact, guardians, curators, etc.) from all contracts held by the deceased.
- It will remove the deceased as authorised person and/or representative on third party accounts.
- It will cancel periodic contributions to Pension Plans.
- It will notify March Vida of the incident.

### INFORMATION ON THE COMPULSORY DOCUMENTATION FOR PROBATE PROCEEDINGS

In addition to signing the Order Note for Probate Proceedings, the interested party must provide the following documents:

- Death certificate issued by the Civil Registry.
- Certificate of Last Will and Testament.
- Will, Declaration of intestate succession or European Certificate of Succession.
- Deed of acceptance and adjudication of inheritance or, where applicable, private document of inventory and adjudication of assets, signed by all the heirs, widowed spouse and legatees where applicable.
- Foreign documents similar to the above, duly translated and with a Hague apostille in the case of non-residents.
- Proof of Inheritance and Gift Tax Settlement for each heir, certifying payment, exemption or prescription of said tax.
- Identity document of the heirs (DNI, Residence card, Passport, etc.)
- Powers of attorney (if acting by proxy).
- Other documents proving the status of heir.

The need for and details of all documents can be found in the Heir Support Guide.

### BASIC INFORMATION ON PERSONAL DATA PROTECTION

Banca March, S.A. will be responsible for the processing of the personal data referred to in this document. (hereinafter, "the Bank"), whose registered office is at Avenida Alexandre Rosselló 8, Palma de Mallorca, Balearic Islands, Spain.

The main purpose of the processing of the data by the Bank is the management of the order that the undersigned hereby gives to the Bank and the Bank's legitimation is therefore the execution of said order. In addition, the personal data referred to in this document may be processed, inter alia, in order to comply with legal obligations, for the fulfilment of which it may be necessary to communicate data to banking supervision and control entities, official bodies or public authorities located both inside and outside the European Union, such as the National Securities Market Commission, the Tax Agency, the Bank of Spain or the Financial Ownership File. In addition, for internal administrative, accounting and control purposes, your data may be communicated to Banca March Group companies. They may also be communicated to collaborating companies and service providers.

We inform you that you may access, rectify, delete your data or limit certain processing or oppose certain uses of the same by writing to the Customer Service Department of the Banca March Group by sending an e-mail to the following address: [atención\\_cliente@bancamarch.es](mailto:atención_cliente@bancamarch.es). You may also contact the Banca March Data Protection Officer at the following email address: [dpo@bancamarch.es](mailto:dpo@bancamarch.es). If you have not obtained satisfaction in the exercise of your rights, you may complain to the Spanish Data Protection Agency.

For more detailed information about the protection of personal data, please consult the extended information about the Data Protection Policy at <http://www.bancamarch.es/> or request a paper copy at any of our branches.

The applicant/representative