

SUCCESSION

MEDIRECT INSTRUCTION FORM

1. INTRODUCTION

Upon notification of death of a MeDirect customer or his/her spouse, a fiscal list will be sent out containing an overview of all the accounts and assets held by the deceased person. In addition, a range of documents must be provided to MeDirect. Until all documents have been received, the relevant accounts will be blocked and no transactions can be executed.

In summary, the release of accounts can only take place upon presentation of the following:

- 1. a death certificate;*
- 2. an inheritance certificate or deed;*
- 3. a clear copy of the identity card (front and back) of all heirs.*
- 4. a clear copy of the bank statement indicating the name and bank details of each heir.*
- 5. A. MeDirect Instruction Form signed by all eligible heirs. In case of minors, the proxy of the appointed guardian or an equivalent document will suffice OR
B. an instruction received from the notary, authorised by the eligible heirs, to act on their behalf with respect to the distribution of the assets held by the deceased.*

This MeDirect Instruction Form should be completed in capital letters.

PLEASE NOTE

- It is not possible to rename the accounts of the deceased person to an account held on behalf of the heir(s). More details on this are provided in the sections below.*
- All accounts in name of the deceased person will be closed following the execution of the instructions contained in the MeDirect Instruction Form.*
- A fee of €50 will be charged for the processing of the succession.*

2. PERSONAL DETAILS OF DECEASED

o Mr o Mrs o Ms

First name: ----- Surname: -----

Address: -----

House number: ----- Postal Box: ----- Postal Code: ----- City: -----

Country: ----- National Registration number: -----

Date of birth: --/--/---- Date of death: --/--/----

Name Spouse: -----

3. DETAILS OF CONTACT PERSON

The undersigned hereby declare that the following person has been nominated to act as a contact person for the treatment of the succession file in the name of the deceased person under Section 2:

o Notary o Heir o Other: -----

o Mr o Mrs o Ms

First name: ----- Surname: -----

Address: -----

House number: ----- Postal Box: ----- Postal Code: ----- City: -----

Country: -----

Tel number: ----- Mobile number: -----

email: -----

4. UNBLOCKING OF ACCOUNT

In case the deceased person is the spouse of a MeDirect customer and was not a MeDirect customer themselves, the MeDirect customer instruction may instruct simply to unblock their accounts by ticking the following box:

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5. INSTRUCTIONS FOR CASH & SAVINGS ACCOUNTS

Heir(s) can become a customer with MeDirect (if not yet a MeDirect customer) and open up a Cash and/or Savings account in their own name. In this case, instructions are required to transfer the balance to this/these newly opened account(s). Note that this account will be opened with the interest rate which is applicable at that time.

Alternatively, the balance can be transferred to another financial institution.

Joint regulated savings account with the deceased: *In case the RSA was held by the deceased person and the heir jointly, the balance can be transferred to a personal RSA account with the premium continued to be accrued from the initial transfer date of the jointly held RSA by the deceased and the heir.*

6. INSTRUCTIONS FOR WEALTH MANAGEMENT ACCOUNTS

Note that financial securities held under discretionary management cannot be transferred and must be sold. The securities will be sold after the verification by MeDirect of the instructions received from the heirs or notary

7. INSTRUCTIONS FOR INVESTMENT ACCOUNTS & MODEL PORTFOLIOS

Please complete this section only if there are financial securities held on an Investment Account (Execution only) and/or Model Portfolio owned by the deceased person.

Please tick the relevant options below:

O SELL ALL SECURITIES HELD ON INVESTMENT ACCOUNT

O TRANSFER ALL SECURITIES HELD ON INVESTMENT ACCOUNT TO ANOTHER ACCOUNT AT MEDIRECT

O TRANSFER ALL SECURITIES HELD ON INVESTMENT ACCOUNT TO ANOTHER FINANCIAL INSTITUTION

Please note that the request to transfer financial securities out to another financial institution generates fees ((please consult MeDirect Tariff & Charges on our website).). Please contact the financial institution to where you wish to transfer the securities to as they will have to initiate the transfer on your behalf. In this case, there is no requirement to complete the table below.

Please complete the below table with the instructions and relevant details if applicable:

[illegible]

- **Complete the MeDirect Instruction Form in capital letters and send it via email at the following email address : succession@medirect.be Please note that you also have the possibility to send it via post.**
- **All eligible heirs stated in the inheritance certificate must paragraph each page of this MeDirect Instruction Form and sign in full on the last page. In case of minors, the proxy of the appointed guardian will suffice.**

8. SIGNATURE OF ALL HEIRS

All heirs stated in the inheritance certificate/deed must paragraph each page of this document and sign in full below. The signatures must conform to the one on their valid Identity Card. In case of non-compliance, MeDirect reserves the right to refuse the instructions and request new ones.

Please include the Full name, Date, Signature and Contact details (Phone number, email address) for each heir.

Name:
Date:
Phone number:
Email:
Signature:

Name:
Date:
Phone number:
Email:
Signature:

Name:
Date:
Phone number:
Email:
Signature:

Name:
Date:
Phone number:
Email:
Signature: