

Date

1. Estate

Name of the deceased	Personal identity number
New address of the estate	

2. Direct savings in funds (fund account). The fund account is closed after sale/transfer.

For **selling** funds, see item 2a.
 For **transferring** funds, see item 2b. **NB! For transfers, the recipient must have a fund account with Länsförsäkringar.**

2a. Sale of funds

Sell all funds.
 Sell the holdings in the funds as specified below.

Name of fund
Name of fund
Name of fund
Name of fund

The proceeds from sales and account deposits will be transferred to the following bank account:

2b. Transfers of funds. NB For transfers, the recipient must have a fund account with Länsförsäkringar.

Transfer all funds to the following recipient (personal identity number): _____
 Transfer the following funds as listed below.

Name of fund	Units	Name of recipient	Personal identity number
Name of fund	Units	Name of recipient	Personal identity number
Name of fund	Units	Name of recipient	Personal identity number
Name of fund	Units	Name of recipient	Personal identity number

3. Securities/Shares in deposit account . Share deposits and deposit accounts are closed after the sale/transfer.

For **selling** securities/shares, see item 3a.
 For **transferring** securities/shares, see item 3b.

3a. Sale of securities/shares

Deposit number

Sell all securities/shares.
 Sell securities/shares as listed below.

Shares/Securities	Number	Market price	Limit price	Valid until
Shares/Securities	Number	Market price <input type="checkbox"/>	Limit price	Valid until
Shares/Securities	Number	Market price <input type="checkbox"/>	Limit price	Valid until
Shares/Securities	Number	Market price <input type="checkbox"/>	Limit price	Valid until
Shares/Securities	Number	Market price <input type="checkbox"/>	Limit price	Valid until
Shares/Securities	Number	Market price <input type="checkbox"/>	Limit price	Valid until

The proceeds from sales and account deposits will be transferred to the following bank account:

3b. Transfers of securities

Deposit number					
<input type="checkbox"/> Transfer all securities (indicate the recipient's details below). <input type="checkbox"/> Transfer securities as listed below.					
Name of recipient	Personal identity number	Recipient deposit/securities account	Bank	Securities	Number
Name of recipient	Personal identity number	Recipient deposit/securities account	Bank	Securities	Number
Name of recipient	Personal identity number	Recipient deposit/securities account	Bank	Securities	Number
Name of recipient	Personal identity number	Recipient deposit/securities account	Bank	Securities	Number
Name of recipient	Personal identity number	Recipient deposit/securities account	Bank	Securities	Number
Name of recipient	Personal identity number	Recipient deposit/securities account	Bank	Securities	Number
The funds in the account will be transferred to the following bank account:					

4. Investment savings accounts (ISK account) If the estate has several ISK accounts, a separate statement can be attached according to the template below.

4a. Sale of funds or transfer of funds and securities within the ISK. Closed after sale/transfer.

ISK account number				
Close the above ISK with Länsförsäkringar Bank. All funds will be sold and regular savings will be terminated. For selling securities, see item 4b. The proceeds from sales and account deposits will be transferred to the following bank account::				
1. _____				
2. _____				
<input type="checkbox"/> Close the above ISK account with Länsförsäkringar Bank. Securities, fund units and cash are to be transferred to the ISK, as described below. NBI! Transfers can only be made within Länsförsäkringar Bank.				
Name of securities/Name of fund	Name of recipient	Recipient ISK	Personal identity number	Number/Units
Name of securities/Name of fund	Name of recipient	Recipient ISK	Personal identity number	Number/Units
Name of securities/Name of fund	Name of recipient	Recipient ISK	Personal identity number	Number/Units
Name of securities/Name of fund	Name of recipient	Recipient ISK	Personal identity number	Number/Units
Name of securities/Name of fund	Name of recipient	Recipient ISK	Personal identity number	Number/Units
Name of securities/Name of fund	Name of recipient	Recipient ISK	Personal identity number	Number/Units

4b. Sale of securities/shares in ISK

ISK account number				
Sale				
<input type="checkbox"/> Sell all securities/shares. <input type="checkbox"/> Sell securities/shares as listed below.				
Shares/Securities	Number	Market price <input type="checkbox"/>	Limit price	Valid until
Shares/Securities	Number	Market price <input type="checkbox"/>	Limit price	Valid until
Shares/Securities	Number	Market price <input type="checkbox"/>	Limit price	Valid until
Shares/Securities	Number	Market price <input type="checkbox"/>	Limit price	Valid until
Shares/Securities	Number	Market price <input type="checkbox"/>	Limit price	Valid until
Shares/Securities	Number	Market price <input type="checkbox"/>	Limit price	Valid until

5. Individual Pension Savings (IPS)

5a. **Access for beneficiary** All holdings and balances will be transferred to the newly opened Beneficiary IPS and the original saver’s IPS will be closed.

Original saver (first/last name)	Personal identity number
Original start date of savings	
Original payment plan (number of years)	IPS account number

5b. Beneficiaries

Beneficiary 1 (first/last name)	Personal identity number	
Address	Post code and town	Branch code
Beneficiary 2 (first/last name)	Personal identity number	
Address	Post code and town	Branch code

6. Accounts

Close accounts
 All accounts must be closed, including both accounts owned individually by the estate and accounts owned jointly with the parties. **NBI** If the estate owns **property/a tenant-owned apartment** that is to be sold, not all accounts can be closed since it will be necessary to **keep an account** for depositing the proceeds of the sale and also for handling **any taxes**.
 The following accounts are to be kept open: _____ Amounts to remain in the account: _____

Payment of account deposits when account is closed				
<input type="checkbox"/> Payment as follows				
Name of recipient	Personal identity number	Clearing number	Account number	Amount or percentage

Specific disclosures

The estate's contact person

Name	Daytime telephone no.
Address	
Post code and town	

Signatures (Mandatory).

NB! The order must always be signed by all parties to the estate. Parties to the estate who are unable to sign the distribution of estate must provide an original power of attorney. The assignment shall be signed according to the attached authorisation documents. Certified copies of ID must be attached for parties residing outside Sweden. Certified copies of ID must also be attached for parties who are outside Sweden when the distribution of estate and/or power of attorney are signed.

Date and town	Telephone no.
Signature	Name in block letters
Date and town	Telephone no.
Signature	Name in block letters
Date and town	Telephone no.
Signature	Name in block letters
Date and town	Telephone no.
Signature	Name in block letters
Date and town	Telephone no.
Signature	Name in block letters

Compulsory authorisation documents

Certified copies of all authorisation documents are to be attached. Certified copies of ID must be attached for parties residing outside Sweden. Certified copies of ID must also be attached for parties who are outside Sweden when the distribution of estate form and/or power of attorney are signed.