

**Annexure 8**  
**Application for deceased claim**

**(To be used for sole holder safe deposit locker(s) / safe custody(ies) without nomination or jointly held safe deposit locker(s) / safe custody(ies) without survivorship mandate)**

**From:**

**Date:**

<Name> \_\_\_\_\_  
<Address> \_\_\_\_\_  
<Contact No:> \_\_\_\_\_  
<Email Id> \_\_\_\_\_

**To,**  
The Branch Manager  
ICICI Bank Limited ("Bank"),  
\_\_\_\_\_ Branch,

**Re: Deceased claim in respect of safe deposit locker(s) / safe custody(ies) held by Late Mr./Mrs./Master/Miss \_\_\_\_\_.**

Dear Sir/Madam,

**1. Notice of demise**

1.1. I/We regret to inform you of the demise of Late Mr./Mrs./Master/Miss. \_\_\_\_\_ on date \_\_\_\_\_ at \_\_\_\_\_. He/ She held the below mentioned safe deposit locker(s) / safe custody(ies) with the Bank.

S. No.	Safe deposit locker number / safe custody number	Name of the safe deposit locker holder(s) / safe custody holder
1		
2		
3		

**2. Deceased's personal information**

2.1. I/We furnish below the required information about the deceased and the legal heirs of the deceased:

Age of the deceased	
Religion of the deceased	
Personal law of the deceased on the date of demise <i>i.e.</i> which law of succession is applicable to the deceased (such as Hindu, Mohammedan, Jain, Sikh, Buddhist, Parsi etc.)	

Following are the legal heirs of the deceased (such as father, mother, sons, daughter, wife, sister, brother etc. as per applicable personal law)<sup>1</sup>:

S. No.	Name	Age	Relation with the deceased	Address and Contact Number

### 3. Claim for settlement

3.1. I/We<sup>2</sup>                      Mr.                      /                      Mrs.                      /                      Ms.

\_\_\_\_\_ residing \_\_\_\_\_ at \_\_\_\_\_

\_\_\_\_\_ state that I/ we am/ are the **executor(s) / administrator(s) / holder(s) of succession certificate / beneficiaries under the will** and I/ we request you to settle my/our claim for the aforesaid safe deposit locker(s) / safe custody(ies) basis the below documentation/ information (*Tick which is applicable*) and as per the Bank's policy:

- 3.1.1. Will of the deceased holder executed on \_\_\_\_\_ duly probated by the Court of \_\_\_\_\_ at \_\_\_\_\_ *vide* order dated \_\_\_\_\_. I/ We being the executor(s) under the probated will, request settlement as per the instructions at part 5 below.
- 3.1.2. Letters of Administration in relation to the estate of the deceased holder issued by \_\_\_\_\_ at \_\_\_\_\_ *vide* order dated \_\_\_\_\_. I/ We being the administrator(s) appointed by the Court, request settlement as per the instructions at part 5 below.
- 3.1.3. Succession Certificate in relation to the estate of the deceased holder granted by the Court of \_\_\_\_\_ at \_\_\_\_\_ *vide* order dated \_\_\_\_\_. I/ We being the holder(s) of the succession certificate, request settlement as per the instructions at part 5 below.
- 3.1.4. The deceased had duly executed a will dated \_\_\_\_\_ bequeathing the properties set out therein including the contents of the aforesaid safe deposit locker(s). However, no probate, letters of administration or succession certificate has been obtained. I/ We being the **beneficiary(ies) under the will / executor(s) of the will (*select as applicable*)**, request settlement without probate / letters of administration/ succession certificate in accordance with the Bank's rules and discretion, as per the instructions at part 5 below. I / We confirm that

<sup>1</sup> Note: Details to be filled in only where the claim for settlement is basis succession certificate or duly executed will in relation to which no legal representation has been obtained.

<sup>2</sup> One can mention "as per above table" where the persons applying as per the succession certificate or the beneficiaries applying basis a will (without legal representation) are the same as the legal heirs listed in the table.

the said will has not been executed in the towns of Mumbai, Chennai and Kolkata and does not deal with any immovable properties in the towns of Mumbai, Chennai and Kolkata. Therefore, the said will is not mandatorily required to be probated.

**4. Minor Beneficiary (To be filled out only where a beneficiary(ies) under a will is/ are minor(s))**

4.1. I, \_\_\_\_\_, am the natural / legal guardian of  Master/Miss \_\_\_\_\_ (date of birth \_\_\_/\_\_\_/\_\_\_) who is a beneficiary under the will referred to at part 3.1.4 above and also a minor as on the date of this claim. I am preferring this application for and on behalf of the said minor.

4.2. I undertake that any contents/ articles of the aforesaid safe deposit locker(s) / safe custody(ies) that may be delivered to me by the Bank as per the instructions at part 5 below shall be utilised for the benefit of the minor only.

**5. Instructions for settlement**

I/ We request the Bank to terminate the safe deposit locker agreement / safe custody agreement and allow access / deliver the contents held in the aforesaid safe deposit locker(s) / safe custody(ies) to \_\_\_\_\_.

**6. Documents submitted (tick as applicable)**

Tick applicable documents	Documents
	Certified copy of Death Certificate
	Self-attested copy of identity proof of applicant(s)
	Copy of the will (originals to be verified in case of un-probated wills)
	Certified-copy of Order of Court granting probate along with a copy of the said order
	Certified-copy of Order of Court granting letters of administration along with a copy of the said order
	Certified-copy of Order of Court granting succession certificate along with a copy of the said order
	Order appointing legal guardian (applicable only in case of minor, if natural guardian i.e. mother and father are not the applicants)

**7. Declarations and undertakings**

7.1. I /We hereby declare that the information stated herein above is true and correct and there is no information that has been concealed or is misleading. All the copies of the documents submitted herewith are true copies of the originals.

7.2. I/We undertake that I/we shall hold / receive the articles / contents held in the safe deposit locker(s) / safe custody(s) in a fiduciary capacity as a trustee of the rightful legal heirs / legatees/ beneficiary(ies) of the deceased safe deposit locker / safe

custody holder, and the deceased claim settlement made to me / us shall not affect the right or claim which any person may have against me / us.

7.3. I/We hereby declare that the aforesaid safe deposit locker(s) / safe custody(s) are not the subject matter of any dispute and that there is no Court order restraining the Bank from making payment / settling the deceased claim in my/our favour or otherwise.

7.4. I/We undertake to furnish such further documents as may be required by the Bank, in its sole discretion, for the purposes of settlement of the present claim.

7.5. I / We hereby indemnify and agree to hold the Bank harmless against any claims, suits, legal proceedings taken by any legal heirs, executors, administrators, legal representatives, arising out of or in connection with the settlement of the deceased in claim accordance with this request letter.

Yours faithfully

Name(s) and Signature(s) of all the applicant(s).

Place:

Date:

**Note: ICICI Bank is not responsible for any delay in disposal of the claim due to lack of full particulars furnished in this application and may insist on calling for legal representation in case there are disputes among legal heirs and if all of them do not join in indemnifying ICICI Bank (or give letter of disclaimer) or where ICICI Bank has reasonable doubt on the genuineness of the applicant(s) being the only heir(s) of the deceased customer.**

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OFFICE USE

Recommendation by BM/DBM:

I have verified the claim request received from the executor(s) / administrator(s) / holder(s) of succession certificate in relation to the estate of the deceased / legal heir(s) of Late Mr./Mrs/Master/Miss \_\_\_\_\_ and have made necessary enquiries about the claim and is satisfied that the claim can be settled. All necessary documents have been obtained. The claim may be paid to the applicant(s).

Any other remarks:

Place  
Date

Signature  
Name  
Designation

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Customer's Acknowledgement slip (To be filled in by the Bank Staff)

Date:

Received from \_\_\_\_\_ safe deposit  
locker number(s) \_\_\_\_\_, a request for deceased claim settlement.

ICICI Bank. \_\_\_\_\_ Branch.

Emp name and ID \_\_\_\_\_ and \_\_\_\_\_.

Signature of Branch official with Bank Seal \_\_\_\_\_