



PERSONAL REPRESENTATIVE IDENTIFICATION FORM

This form is to be used to record information about a Personal Representative authorized to administer the Estate of a Bridgewater Bank customer.

DECEASED CUSTOMER INFORMATION

Customer Name: \_\_\_\_\_
Joint Customer Name (if applicable): \_\_\_\_\_
Address: \_\_\_\_\_
Telephone Number: \_\_\_\_\_
Type of product: [ ] Mortgage Account Number: \_\_\_\_\_
[ ] Smart eSavings Account Number: \_\_\_\_\_
[ ] GIC Account Number: \_\_\_\_\_

PERSONAL REPRESENTATIVE INFORMATION

Full Name: \_\_\_\_\_
Contact Address: \_\_\_\_\_
Telephone Number: \_\_\_\_\_
Date of Birth: \_\_\_\_\_ Relationship to the Deceased Customer: \_\_\_\_\_
Government Issued Photo Identification
ID Type: \_\_\_\_\_ ID Number: \_\_\_\_\_
Issuing Province / State: \_\_\_\_\_ Issuing Country: \_\_\_\_\_
Expiry Date: \_\_\_\_\_ Date ID Verified: \_\_\_\_\_
Does the Personal Representative have a product with Bridgewater Bank? [ ] Yes [ ] NO
If yes, Account Number: \_\_\_\_\_
Signature of Personal Representative: \_\_\_\_\_ Date: \_\_\_\_\_

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**CERTIFICATE OF SIGNATURE AND IDENTITY VERIFICATION**

(To be completed by Solicitor/Notary or Deposit Broker acting for or on behalf of Bridgewater Bank)

I, \_\_\_\_\_, a \_\_\_\_\_  
Name of Individual Position

with \_\_\_\_\_ of \_\_\_\_\_  
Name of Law Firm/ Brokerage Address

in \_\_\_\_\_,  
City, Province

do hereby certify that the signature appearing above is the signature of the individual named above and was subscribed to this form in my presence; that on behalf of Bridgewater Bank I personally ascertained the identity of the individual's original identification as recorded above.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please print, sign and send the completed document back to us by one of the following methods:

- Scan, then email to [customer.experience@bridgewaterbank.ca](mailto:customer.experience@bridgewaterbank.ca),
- Fax to: 1.866.841.3537
- Mail to: Bridgewater Bank, Suite 150, 926 – 5<sup>th</sup> Ave SW, Calgary, Alberta T2P 0N7.

If you have any questions or wish to obtain further information regarding this agreement, please contact us toll free at 1.866.243.4301 or email us at [customer.experience@bridgewaterbank.ca](mailto:customer.experience@bridgewaterbank.ca).