Lloyds Bank Estate Administration Service

Website User Guide

A guide to how our website can support you and keep you in the picture during the Estate Administration Process

For over 100 years, Lloyds Bank has offered a personal and professional service to bereaved customers, administering Estates and helping thousands of Beneficiaries.

Our Estate Administration Service is available to everyone, not just existing customers. We will always be here for anyone associated with the Estate to contact us, both now and in the future.

Our experienced team can provide you with personal support and expertise. We will guide you through the process step by step. We have created our web based customer hub to allow you to track your case online and find information about the work we are doing for you.

Over the following pages you will find an overview and useful guide to our Estate Administration Service Website, https://estates.lloydsbank.com

Our website will allow you to:

- Find out what stage the Estates process has reached
- Check what remains to be done
- Keep in touch with your Estate Officer

Getting Started

Once we have been appointed with an Estate, following our initial call or visit we will send your website activation details, either via mail or a mixture of e-mail/mail, enabling you to register to use the site.

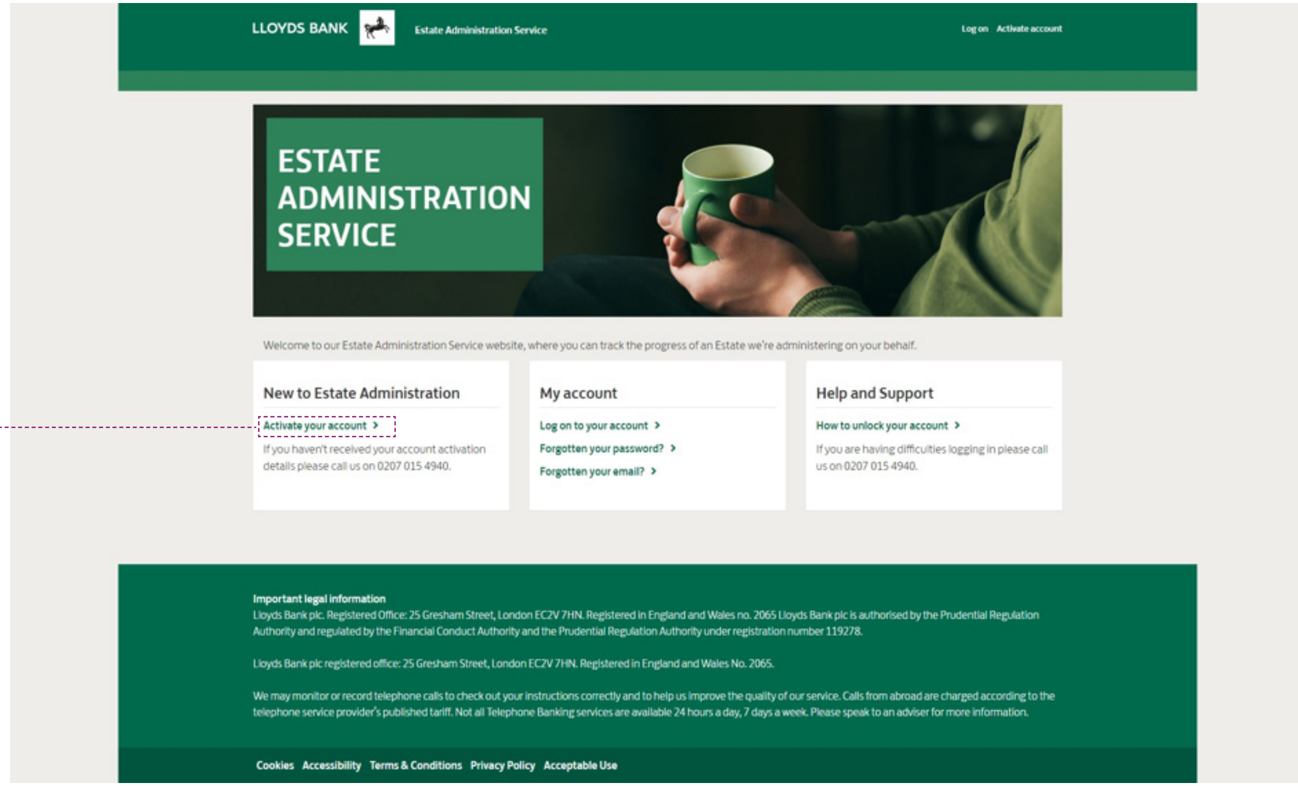
The next pages will guide you through what you will find once you activate your account.

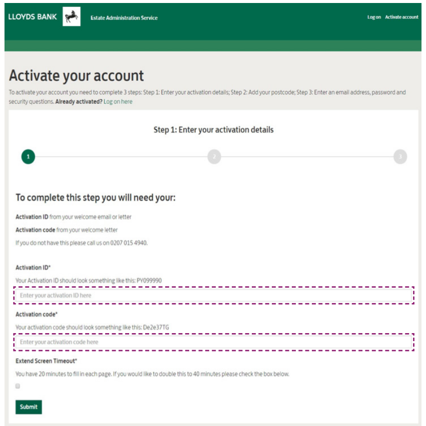
Home Page

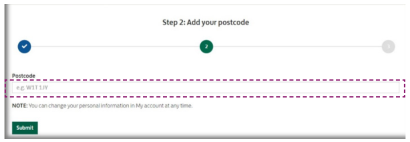
The Home Page allows you to:

- Activate your account – using the activation details previously sent to you.
- Log on to your account – including resetting log-on details should this be required.
- View the site T&C's, Privacy Policy and other important site information.

When you first access the Website you will need to activate your account by clicking here







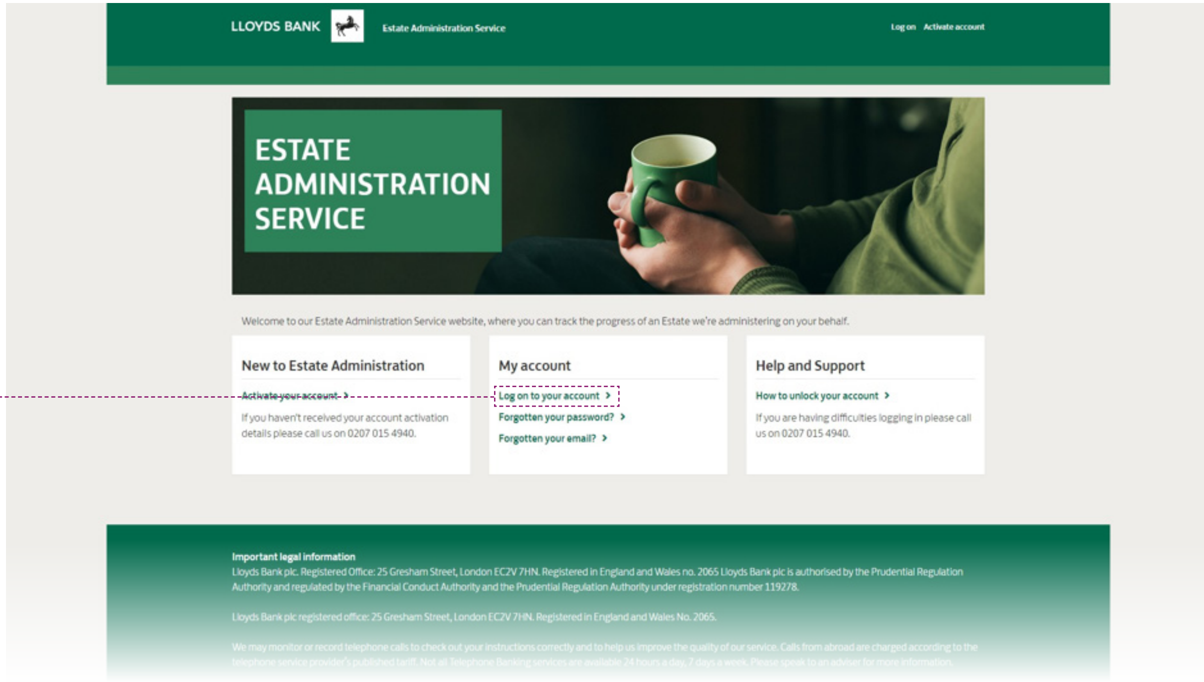
Activating your account

You can activate your account in three simple steps:

1. **Entering your activation details** – using the activation ID and Code we have sent to you.
2. **Adding your postcode** – this will allow us to validate your identity against the information we hold for you.
3. **Entering an e-mail address, password and security questions** – an e-mail address to verify your identity (which will also be your username), a password of your choosing and six security questions to further protect you on the site. A selection of these security questions will help us unlock your account in future should you forget your password.

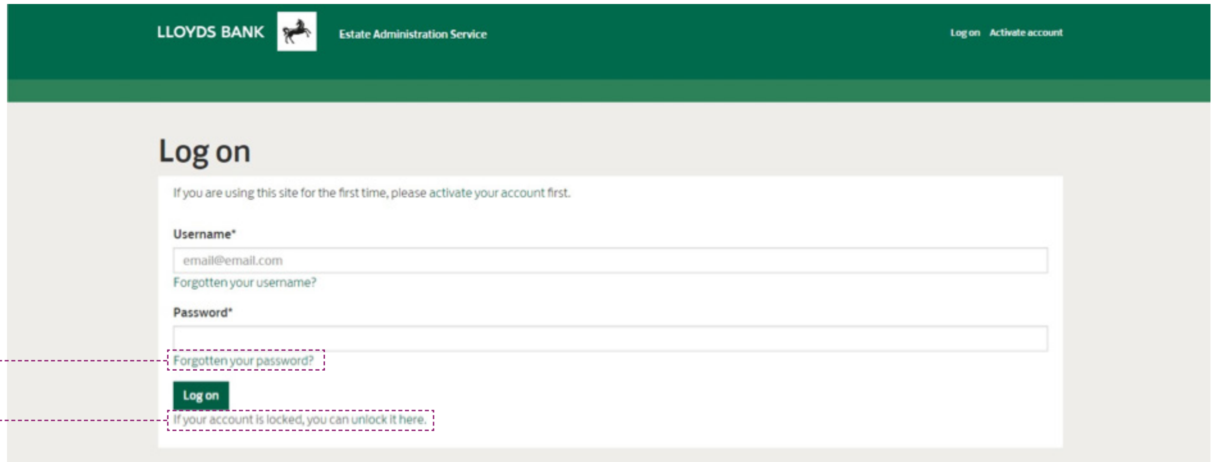
To complete your account activation an e-mail will be sent to your chosen e-mail address, containing instructions on how to complete your account activation by following a link provided in the e-mail. Once the link has been selected your account activation will be complete.

Lloyds Bank Estate Administration Service



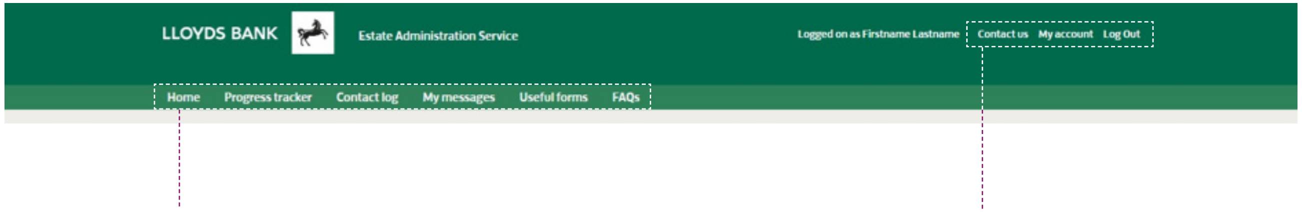
Logging into your account

Once an account has been activated you will be able to 'Log on' using your chosen Username and Password by following the link on the Homepage.



From here you can also reset any forgotten user details,

or if for any reason your account has been locked, follow the link to resolve this also.



Account home page

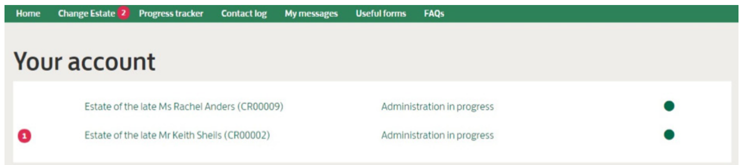
When logging into an account you will arrive at the home page and be presented with a task bar at the top of the screen showing the following options:

- **Progress tracker** – an indicative timeline showing the progress of the Estate.
- **Contact log** - a record of the most important interactions you have had from our Estates Team. You will need to refer to letters or emails separately for detailed content.
- **My messages** – shows details of any messages received from the team and also allows you to message your dedicated Estate Manager/Officer directly.
- **Useful forms** - forms and other documents that can be downloaded or may require printing as indicated by your Estate Officer to complete some of the stages of the Estate administration process.
- **FAQ's** – some frequently asked questions in relation to the Estate Administration Service.

In addition to this further options are given at the right of the screen. These are:

- **Contact us** – a direct link to allow messages to be sent to the Estate Manager/Officer dealing with the Estate.
- **My account** – a link to be able to view/ change various elements of personal account information.
- **Log out** – a link to log out of the Estate Administration Service website.

Note - If multiple Estates are being administered these can be linked to one account and an additional option will then be presented in the task bar of 'Change Estate'. The red icon will indicate the number of Estates, and a link to each additional Estate will be provided. Selecting the appropriate link will take the home page of that Estate.

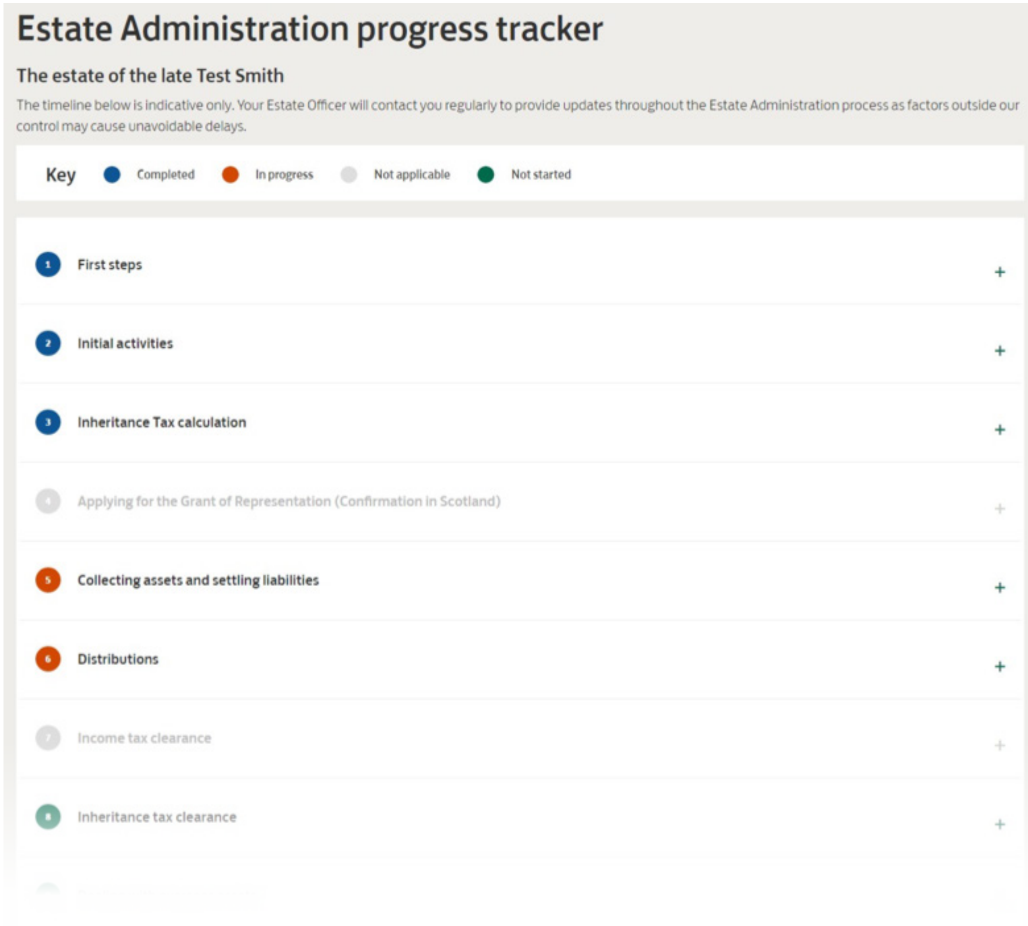


Keep track of your case

The **Estate Administration progress tracker** is an easy way to see how the Estate is progressing. The tracker displays the 10 steps involved in the Estate Administration process and will indicate those relevant to your case.

Each stage can be expanded by clicking on the plus (+) symbol, to give you more detail and show the approximate timescales for that stage.

The colour Key shown will help you to identify where we are with each stage of the administration. Not all stages will apply to every Estate and some may overlap with each other, the colour Key has been designed to highlight these more clearly.

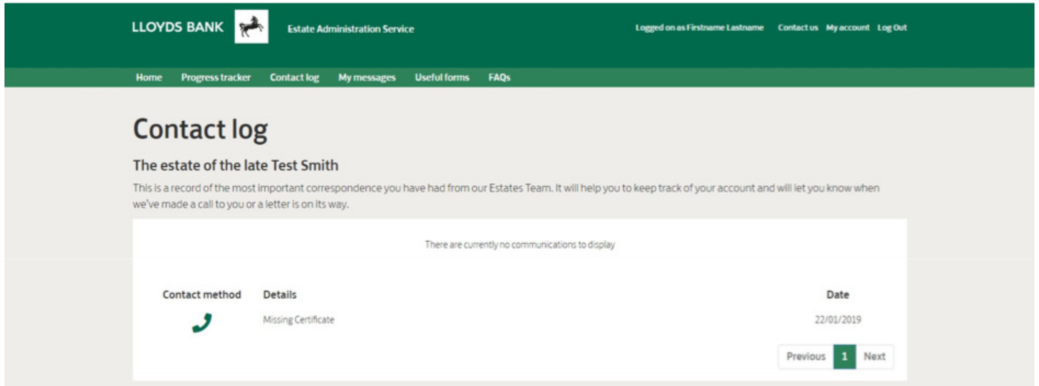


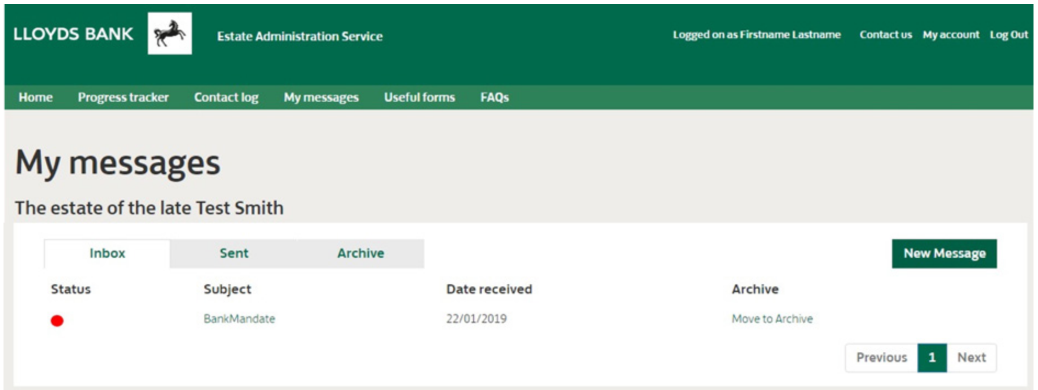
Contacting you

The **Contact Log** displays a record of important interactions you have had from our Estate Team. Whether this is a telephone call, e-mail or letter, they will be listed on this screen. These records are not interactive.

To read their content you will need to refer separately to your messages, emails and the postal correspondence that you have received.

Any unseen or unread communications will be highlighted by a red icon , which will also display in the task bar.



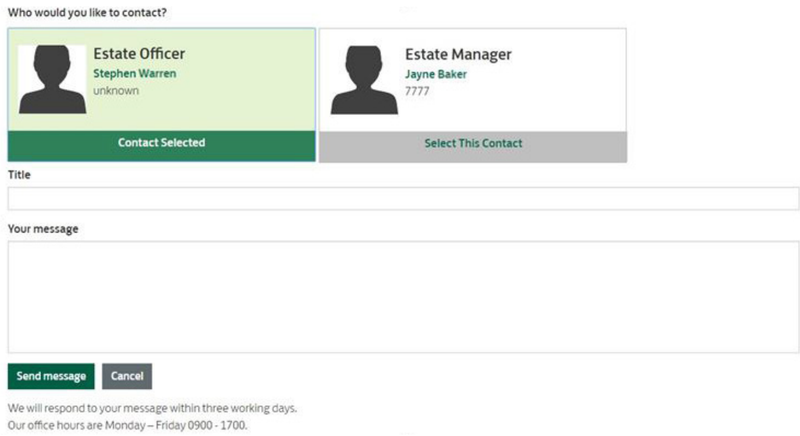


My Messages

My Messages shows any direct messages sent to and from the Estate Team. Messages to you will be displayed in an Inbox, any messages you have sent to us can be found in the "Sent" items and an "Archive" location allows you to store older messages once you have read them.

When you create a new message you will be given the option to send this direct to either the Estate Officer or Estate Manager who is handling the Estate. You can send your message by easily selecting who you want to contact, providing a brief title of your message and then writing your message to us.

Once complete press "send"



My account

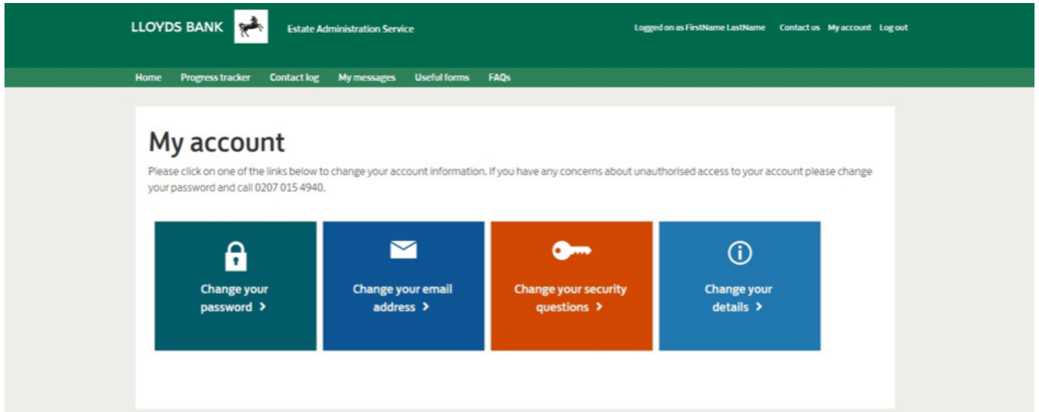
My account displays various options to help you manage your account.

These include

1. Changing your password
2. Changing your contact email address
3. Changing your security questions
4. Updating your details including telephone number and address

For additional security purposes any password/e-mail changes will be confirmed via e-mail to your registered e-mail address.

Furthermore, any e-mail, name, address or telephone changes made within ‘My account’ will also be updated with the Estate Team automatically.



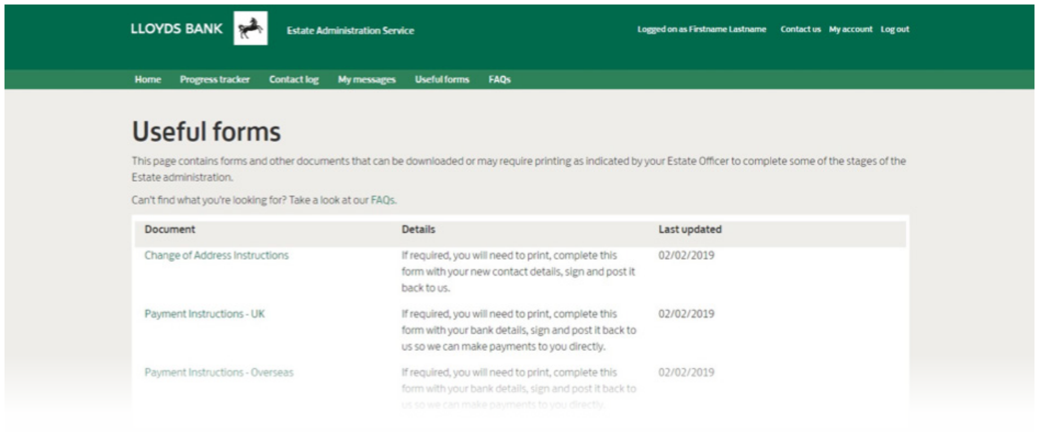
Useful Forms

Useful Forms are forms and other documents that may be required at some stage during the Estate administration process.

We will tell you when we need these forms to be completed by you but we have included them here for easy access if you need another copy.

The links provided will allow you to open and view the forms in PDF format, which can then be, completed either by entering the information into the e-form or by printing out the form and completing it by hand before returning to the Estate Team. The return address details will be provided on each document.

Included in this list is a brochure containing information on other products and services offered by Lloyds Bank plc such as banking, savings and investments.



FAQs

A list of Frequently Asked Questions which are expandable by clicking on the plus (+) symbol.