

Member Details

Members Name:		Member Number:	
Address:	Suburb:	State:	Postcode:
Date of Birth:	Date of Death:		

Estate Matters Contact details

- Please provide all correspondence to the Executor/Administrator
 Please provide all correspondence to the Estates Solicitor

Full Name:			
Address:	Suburb:	State:	Postcode:
Phone Number:	Email:		

Original or Certified Copy of the Original Death Certificate

- I hereby hand you the original / a certified copy of the Original Death Certificate
 Please contact the Executor/Administrator/Solicitor of the Estate for a Certified Copy of the Original Death Certificate

Informant(s) Details

Informant(s) Full Name:			
Address:	Suburb:	State:	Postcode:
Phone Number:	Email:		
<input type="checkbox"/> Solicitor	<input type="checkbox"/> Executor	<input type="checkbox"/> Administrator	<input type="checkbox"/> Relative <input type="checkbox"/> Other

Informant(s) certification

I certify that the above information provided in relation to this Deceased Member Notification is true and correct.

Informant:	Date:
Informant:	Date:

Office use section only**Account Access**

- Have all joint accounts been changed to individual? Yes No
If no, has statement for client been amended? Yes N/A

Estate Documentation included with this notification

- | | |
|---|--|
| <input type="checkbox"/> Certified Copy of Will | <input type="checkbox"/> Withdrawal form signed by each Executor |
| <input type="checkbox"/> Certified Copy of Original Probate | <input type="checkbox"/> Certified Copy of I.D (e.g. Driver's Licence) |
| <input type="checkbox"/> Certified Copy of the Original Death Certificate | <input type="checkbox"/> Account Closure form |
| <input type="checkbox"/> Certified Copy of Letters of Administration | <input type="checkbox"/> Release and Indemnity form |

Checklist

- | | |
|---|--|
| <input type="checkbox"/> Have all individually owned accounts been frozen? | <input type="checkbox"/> Remove Token (if applicable) |
| <input type="checkbox"/> Have all deceased member's POA's/ATO's been removed from all accounts? | <input type="checkbox"/> Have you created/updated an updateable Deceased Estate Event including any comments |
| <input type="checkbox"/> Has the deceased indicator box been completed in P&R? | <input type="checkbox"/> Deceased Member Notification has been sent to Payments and Settlements Department |
| <input type="checkbox"/> Close Debit cards | <input type="checkbox"/> Change address 9998 postcode |
| <input type="checkbox"/> Close and redeem cheque book | |

Processed by:	Date:
Finalised by:	Date: