Deceased Estate Form

We're sorry for your loss.

The loss of a loved one is a difficult time.

For support in completing this form, please visit newcastlepermanent.com.au/contact-us for how to contact us.

For further information on Deceased Estates, please visit newcastlepermanent.com.au/deceased-estates

Privacy Notice: We collect your name, contact details and information about your relationship to the Deceased so we can confirm your identity as the Notifier of the Deceased. More information about how we collect, use and store your personal information, including how you can access your personal information or make a complaint, is available in our Privacy Policy at newcastlepermanent.com.au/privacy-policy

Part A. Deceased customer notification

- Part A of this form will be used to identify accounts held by the Deceased.
- Please provide us with evidence of death (e.g. Death Certificate), if available and if it has not already been provided to us.

Deceased's details:

Full name of the Deceased ______________________________

DOB of the Deceased ☐☐ / ☐☐ / ☐☐☐☐ Customer number (if known) ☐☐☐☐☐☐☐☐

Date of death ☐☐ / ☐☐ / ☐☐

Account number(s) if known ☐☐☐☐☐☐☐☐☐ ☐☐☐☐☐☐☐☐☐
☐☐☐☐☐☐☐☐☐ ☐☐☐☐☐☐☐☐☐

Deceased's residential address ______________________________

State ☐☐☐ Postcode ☐☐☐☐

Marital status of the Deceased (select all that apply) ☐ Widowed ☐ Single ☐ Divorced ☐ Married ☐ Defacto/Domestic partnership ☐ Separated

Does the Deceased hold any business accounts? ☐ Yes ☐ No

Part B. Notifier of Deceased

- Part B of this form is used to collect your details.

Name ______________________________

DOB ☐☐ / ☐☐ / ☐☐☐☐ Notifier's customer number (if applicable) ☐☐☐☐☐☐☐☐

Address ______________________________

Phone ☐☐☐☐☐☐☐☐☐☐ Email ______________________________

Relationship to the Deceased ______________________________

Your role in the management of the Estate ☐ Executor ☐ Next of Kin ☐ Beneficiary ☐ Not applicable

Name of Next of Kin ______________________________ Relationship to the Deceased ______________________________

Signature ______________________________

Newcastle Permanent, part of Newcastle Greater Mutual Group Ltd
ACN 087 651 992, Australian Financial Services Licence/Australian credit licence 238273.

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Part C. Named Executors/Administrator/Next of Kin/Beneficiary Administrator Information

☐ Tick the box if you have already completed Section B Notifier of Deceased. If you have done this, you do not have to complete Part D unless there are additional people to add. If your information is provided in Part B, you don't need to complete this section, however you must still show your identification at the Branch.

Named Executors &/or Next Of Kin &/or Administrator:

Name ______________________________

DOB __ __ / __ __ / __ __ __ __ Customer number (if applicable) __ __ __ __ __ __ __ __

Address ______________________________

Phone __ __ __ __ __ __ __ __ __ __ Email ______________________________

Relationship to the Deceased ______________________________

☐ ID provided &/or Customer number ______________________________

Signature (Executor) ______________________________

Name ______________________________

DOB __ __ / __ __ / __ __ __ __ Customer number (if applicable) __ __ __ __ __ __ __ __

Address ______________________________

Phone __ __ __ __ __ __ __ __ __ __ Email ______________________________

Relationship to the Deceased ______________________________

☐ ID provided &/or Customer number ______________________________

Signature (Executor) ______________________________

Part D. Joint to Single Only

☐ **Joint Accounts Only: (Please complete PARTS A, B, C & D)**

☐ I/we certify that I/we held a joint account with the Deceased. I/we request Newcastle Permanent to change the name of the above account(s) so that it is in my/our name(s) only. It is the responsibility of the surviving member(s) to ensure any regular payments are met. I/we understand that direct debits on the account may be cancelled, and I/we am/are responsible for re-establishing these if I am the Executor.

☐ I/we acknowledge that by notifying Newcastle Permanent of the Deceased's death that all accounts held in the sole name of the Deceased will be frozen to prevent further transactions. All direct debits and regular payments will also be stopped. All debit cards, cheque books and credit cards cancelled and Internet Banking will be suspended. If the surviving member holds an additional credit card, this will be cancelled and they will need to reapply for a new credit card.

☐ If the Deceased holds loan products only, Newcastle Permanent will be in touch to discuss the next steps. Should the freezing of the assets place the Next of Kin in hardship, our collections team can discuss options with you. Please let us know should you need us to contact you to discuss your circumstances.

Joint Account Holder Signature 1 ______________________________ Customer number __ __ __ __ __ __ __ __

Joint Account Holder Signature 2 ______________________________ Customer number __ __ __ __ __ __ __ __

Joint Account Holder Signature 3 ______________________________ Customer number __ __ __ __ __ __ __ __

Joint Account Holder Signature 4 ______________________________ Customer number __ __ __ __ __ __ __ __

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Part E. If using a Legal Representative:

Name ____________________

Address ____________________

Phone ☐☐☐☐☐☐☐☐☐☐ Email ____________________

BSB ☐☐☐ - ☐☐☐ Account number ☐☐☐☐☐☐☐☐☐☐☐☐☐

Reference number ☐☐☐☐☐☐☐☐☐☐☐☐☐

Trust Account name ____________________

☐ I consent to you communicating with my legal representative about this matter

Part F. Indemnity

☐ I/we confirm any outstanding unsecured liabilities e.g. credit cards/personal loans, will be finalised from the Estate prior to funds being dispersed. If insufficient funds are available, Newcastle Permanent will contact the Estate for next steps.

☐ I/we indemnify Newcastle Permanent and will keep it indemnified against all actions, claims, demands or suits that may be brought or made against it and also against all charges, costs, expenses or losses that it may incur or for which it may be liable in respect of the amount/s standing to the credit of the Deceased in the above account/s.

☐ I/ We unconditionally and irrevocably indemnify Newcastle Permanent and will keep it indemnified against all actions, claims, demands or suits that may be brought or made against it and also against all charges, costs, expenses or losses that it may incur for which it may be liable in respect of the release of the amount standing to the credit of the Deceased in the above account/s in accordance with my/our request.

☐ I/ We undertake to apply assets in the Estate of the Deceased first in payment and discharge of the Deceased's debts and then in accordance with the Will of the Deceased or Grant of Probate (if obtained).

☐ We are legally bound to be satisfied with your identity. I/We have provided our proof of identification in Branch, attached a certified copy &/or have updated my Newcastle Permanent Customer Number.

Signature (Executor) ____________________

Signature (Executor) ____________________

Signature (Executor) ____________________

Part G: Disbursement of Funds

☐ **I/we wish all funds to be transferred to our legal Representative's Trust Account listed previously.**

☐ **I/we wish all funds to be transferred to ' Estate of the late ' account held with another institution and attach evidence (e.g. Bank Statement on letterhead) to this form.**

☐ **I wish Newcastle Permanent to open and transfer the funds to an Estate of the Late Account (Everyday Account)**

Note: If you already hold an "Estate of Late" Account with another institution, Newcastle Permanent requires statement showing the BSB, account number and account name in order to transfer funds.

By completing the below, I/We as the Executor(s) wish to open an Estate of The Late account and have all funds transferred into this account. I/We understand this account is to be operated as per the Will instructions. I/We have read a copy of the terms and conditions applicable to this account and agree to be bound by Newcastle Greater Mutual Group Ltd Constitution, and agree to be bound by the terms and conditions applicable to this account. I/We undertake to apply assets in the Estate of the Deceased first in payment and discharge of the Deceased's debts outside of Newcastle Permanent and then in accordance with the Will of the Deceased or Grant of Probate/Letter of Administration (if obtained). I/we understand that Newcastle Permanent will transfer the net funds, being assets less liabilities.

☐ **Internet Banking Access:**

Note: Full internet banking access is only available where Single Executor is available.

Signatures to operate as per the Will:

Signature ____________________ Customer number ☐☐☐☐☐☐☐☐

Signature ____________________ Customer number ☐☐☐☐☐☐☐☐

Signature ____________________ Customer number ☐☐☐☐☐☐☐☐

Part H. Probate Waive

☐ Tick this box if this section is not applicable.

Newcastle Permanent will consider Waive of Probate/Letter of Administration for accounts over $15,000.

What accounts or Assets outside of Newcastle Permanent did the Deceased hold at the date of death?

Details of family members or close personal relationships who may expect to be provided for from the assets of the Deceased:

Part I. Authority to release funds

☐ Tick this box if this section is not applicable.

Funeral costs:

Newcastle Permanent will release funds from the Deceased's account to cover reasonable funeral costs. We require a tax invoice inclusive of EFT Details provided.

If the invoice is higher than the available balance, Newcastle Permanent will pay all available funds and close the account.

☐ Executor/ Next of Kin seeking reimbursement. Proof of payment/invoice and bank statement attached.
Note: If Executor/Next of Kin has paid funeral and seeking reimbursement, Newcastle Permanent is only able to reimburse Executor of the Will or Next of Kin if no Will Exists.

Signature

☐ I have included a Tax Invoice inclusive of EFT Details for the purpose of the Deceased's funeral.

Probate Application costs

Newcastle Permanent will release costs to apply for Probate in your relevant state or territory. These will be issued via a Cheque in the Court's Name OR Transfer to your legal representative. We will cover the application fee only, not the legal fees.

☐ **Transfer to legal nominated account as mentioned above:**

Nominated amount $ Sign here

☐ Invoice attached

Internal use only:

Call Operations and Deceased on 4390 or email deceased.estates@newcastlepermanent.com.au