

Deceased Estate – Documents we may need

When you notify us of the passing of your loved one, we will need some documents from you.

We will ask you to provide certified copies of Proof of Death documents such as:

- Death certificate
- Doctor's Medical certificate
- Solicitor or Coroner's letter
- Funeral Bill
- Grant of Probate
- Letters of Administration
- A certificate issued by the public trustee or Trustee Company authorised to do so
- Police report.

Anyone can notify us of the loss of a loved one. However, before we can share information about your loved one's accounts, you will need to be an authorised representative of their estate.

We will ask you to provide certified copies of:

- a signed Will naming you as the executor; or
- if there is no Will, a death certificate naming you as the next of kin
- letters of Administration
- Grant of Probate

Unless you are already a bank customer, we will need to identify you and will need acceptable photo identification such as:

- Australian driver's licence (including the back of the Driver Licence if your address has changed) or foreign Driver Licence containing a photograph of the person
- Australian Passport
- Australian card issued under a State or Territory for the purpose of proving a person's age and containing a photograph of the person
- Foreign passport or similar travel document containing a photograph and the signature of the person

If you are unable to provide a document from the list above, please provide one document from each the list below:

- Australian Citizenship certificate
- Australian Pension card issued by The Department of Human Services/Centrelink
- Australian Concession card or Commonwealth Seniors Health card

We also require a secondary Australian ID document. **Provide ONE document from this section:**

- A document issued by the Australian Commonwealth or a State or Territory within the preceding 12 months that records the provision of financial benefits to the individual and which contains the individual's name and residential address. (For example, a Centrelink Statement.)

- A document issued by the Australian Taxation Office within the preceding 12 months that records a debt payable by the individual to the Commonwealth (or by the Commonwealth to the individual), which contains the individual's name and residential address.
- A document issued by an Australian local government body or Utilities provider within the preceding 3 months which records the provision of services to that address or to that person (the document must contain the individual's name and residential address). This can include a Telephone landline (not mobile) bill, or Electricity, Gas or Water bill.

If an ID document is written in a language that isn't English, it must be accompanied by an English translation prepared by an accredited translator.

Document Certification

Who can certify the documents?

A list of those who can certify documents include:

- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described)
- A Justice of the Peace
- A notary public
- A member of the police force of the Commonwealth or of any State or Territory
- An agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- Consulates/Embassies
- An accountant who is a member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants

Acceptable certification of documents

Each copy of the document must be certified by an approved certifier as follows:

The approved certifier must write on each page of the document:

- Full printed name of the "Approved Certifier" (e.g. Michelle Helena Citizen)
- Date the document was certified
- Signature of the approved certifier
- The capacity in which they have certified the document, e.g. police officer, etc.
- The Registration number (if applicable) of the certifier, and
- The following text:

If single page: I certify that this is a true and complete copy of the original document which I have sighted.

If multiple pages: I certify that this page is a true and complete copy of page [insert page number of document] of [insert total number of pages in the document] of the original document which I have sighted.

If there are several Representatives, for example, joint executors appointed in a Will, then we will need to identify both executors.

At any point in time, you can appoint a legal representative to act on your behalf. Your legal representative will need to provide us with the documents outlined above.

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