

## **CHECKLIST OF INFORMATION REQUIRED**

### **INFORMATION ABOUT THE DECEASED**

Alternative names used, to that shown in Will, (if any):

Residential address at time of death:

Occupation at time of death (if retired, specify occupation prior to retirement):

Marital status at time of death:

Date of birth:

Date of death:

Place of death:

### **INFORMATION ABOUT EXECUTORS AND ADMINISTRATORS**

Full name of each, if different from that shown in Will:

Current residential address of each, if different from that shown in Will:

Current occupation of each (if retired, also specify occupation prior to retirement):

Marital status of each:

Home/work telephone number for each:

Mobile telephone number for each:

Email address for each, and detail of preference for method of communication (ie prefer not by email, or only email, etc):

### **INFORMATION ABOUT BENEFICIARIES**

Full contact details for each beneficiary.

Specify which (if any) beneficiaries are under 18 years of age. Provide date of birth.

Bank account details for beneficiaries

### **DOCUMENTATION REQUIRED (IF AVAILABLE)**

Copy of last income tax return (advice is needed to be provided to the Australian Tax Office of the death)

Recent bank statement for each account

Share certificates or list of shares held and contact details for share broker

Any accounts owed by deceased at date of death

Insurance policies

Medical benefits details (name of insurer, contact details, copy of certificate of insurance)

Taxation group or PAYG certificates

## **SERVICES THAT NEED TO BE CANCELLED**

Telephone

Electricity

Newspaper subscription

Club/Union membership

## **IF PENSIONER**

Advise Centrelink and apply for funeral benefit

## **ASSETS OF DECEASED**

### *Real Estate*

Location of title documents. Address of each property and whether co-owned or owned solely by the deceased.

### *Personal Estate*

Motor vehicles (current whereabouts, registration number and insurance details)

Furniture: details and value

Watches, trinkets, jewellery etc

Exact amount of money in hand or in house at time of death

Bank/like accounts in sole or joint names (specifying which)

    Name of financial institution(s)

    Branch address

    Account number(s)

### *Shares, Bonds and Debentures*

    Name of each company

    Number and type of shares

    Location of share certificates and any other pertinent details

### *Life Policies Including Bonuses*

    Name of life insurance company

    Number of policy

    Location of policies

### *Debts due to the deceased at date of death*

    Provide full details

    If deceased had an interest in a contract (eg partnership, long term purchase contract etc) specify whereabouts of contract:

*Salary, Wages, Pensions, Long Service Leave Entitlements, Holiday Pay etc*

Employer name

Employer address

Full details of pension entitlement

*Share in business or farm property*

Provide full details

## **LIABILITIES OF DECEASED**

*Funeral expenses*

Funeral Director's name

Funeral Directors address & contact details (email, phone)

*Income Tax*

Where was last income tax return lodged?

By whom?

Provide a copy of last return

Provide PAYG certificates

*Other Debts Owed*

Rates

Power/gas/water & other utilities

Shop accounts

Credit cards

Health insurance