



# WILLPOWER PLUS

Documents required to finalise Estates



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## Details of documents and information needed for the administration of a deceased's estate

Not all of the following documents will be needed or relevant for every estate but some will be relevant for every estate.

<p>1. In relation to a Will:</p> <p>1.1 the deceased's last Will (or information about its location, or the unsuccessful searches made to ascertain its whereabouts)</p> <p>1.2 any other document which may embody the deceased's testamentary intentions (such as a codicil or list of gifts for particular beneficiaries)</p> <p>1.3 the executor's name, address, contact details and occupation</p> <p>1.4 the name, address, age and relationship to the deceased of any beneficiary</p> <p>1.5 a family tree for the deceased, showing spouses (including defacto), children, step-children, and beneficiaries</p> <p>1.6 details of any marriage or divorce by the deceased since the date of the will</p>	<input type="checkbox"/>
<p>2. Death certificate</p>	<input type="checkbox"/>
<p>3. If the deceased owned real estate (including with another):</p> <p>3.1 the Certificate of Title for the real estate or, if the whereabouts of the Certificate is not known or the property is mortgaged, the latest rate notice for the property,</p> <p>3.2 appraisal of the value of the property (such as from a real estate agent)</p> <p>3.3 insurance details for the property (including the amount insured and the expiry date for the policy)</p>	
<p>4. For savings or investment accounts held by the deceased (including with another): passbooks, bank statements, account statements, deposit records and the like</p>	<input type="checkbox"/>
<p>5. For shares owned by the deceased (including with another): details of the company, a recent dividend statement, and the SRN for each company</p>	<input type="checkbox"/>
<p>6. For motor vehicles owned by the deceased (including with another):</p> <p>6.1 registration papers or the registration number, make, model and year, and</p> <p>6.2 an estimate of the value of each motor vehicle</p>	<input type="checkbox"/>

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<p>7. For the deceased's contents:</p> <p>7.1 details, such as a description of the contents,</p> <p>7.2 the estimated value of each item of contents separately given, and</p> <p>7.3 insurance details for the contents</p>	<input type="checkbox"/>
<p>8. If a Life insurance policy was owned by the deceased; the policy or, if not available, details of the insurer, policy number, life insured, nominated beneficiary and insured amount.</p>	<input type="checkbox"/>
<p>9. If the deceased was lodging, or was required to lodge, tax returns:</p> <p>9.1 Name and address of deceased's accountant</p> <p>9.2 Last tax return and notice of assessment, or the deceased's TFN</p>	<input type="checkbox"/>
<p>10. If the deceased was employed at date of death: last pay slip or, if not available, the name and address of the deceased's employer</p>	<input type="checkbox"/>
<p>11. If the deceased was a member of a superannuation fund:</p> <p>11.1 name of superannuation fund and membership number</p> <p>11.2 copy of deceased's Binding Death Benefit Nomination (or date, if a copy is not available) or other nomination (if a binding nomination was not made)</p> <p>11.3 last statement received from superannuation fund</p>	<input type="checkbox"/>
<p>12. If the deceased had any other asset: a description of the asset (and the original or copies of any document relating to that asset)</p>	<input type="checkbox"/>
<p>13. If the deceased owed money at death: details of the money owed including contingently owned, such as on a guarantee (and any document relating to the debt or liability)</p>	<input type="checkbox"/>
<p>14. If the deceased received a pension: the Centrelink Reference Number (CRN) or DVA number</p>	<input type="checkbox"/>
<p>15. In relation to medical benefits:</p> <p>15.1 the deceased's Medicare number, and</p> <p>15.2 the name of any medical benefits fund and membership number</p>	<input type="checkbox"/>
<p>16. Where the deceased occupied a residence: details of utilities, such as electricity supplier, gas supplier, telephone provider, and the like</p>	<input type="checkbox"/>