Browne Linkenbagh

DOCUMENTS *REQUIRED TO FINALISE ESTATES*

THE BLUE MOUNTAINS' LEADING WILLS & ESTATES LAW FIRM

PROTECTING WHAT MATTERS MOST

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

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1.IN RELATION TO A WILL: 1.1 the deceased’s last Will (or information about its location, or the unsuccessful searches made to ascertain its whereabouts) 1.2 any other document which may embody the deceased’s testamentary intentions (such as a codicil or list of gifts for particular beneficiaries) 1.3 the executor’sname, address, contact details and occupation 1.4 the name, address, age and relationship to the deceased of any beneficiary 1.5 a family tree for the deceased, showing spouses (including defacto), children, step-children, and beneficiaries details of any marriage or divorce by the deceased since the date of the will	☐
2. DEATH CERTIFICATE	☐
3.IF THE DECEASED OWNED REAL ESTATE (INCLUDING WITH ANOTHER): 3.1 the title reference for the real estate or, if that is not known, the latest rate notice for the property, 3.2 appraisal of the value of the property (such as from a real estate agent) – 3 are usual, 3.3 insurance details for the property (including the amount insured and the expiry date for the policy)	☐
4.FOR SAVINGS OR INVESTMENT ACCOUNTS HELD BY THE DECEASED (INCLUDING WITH ANOTHER): PASSBOOKS, BANK STATEMENTS, ACCOUNT STATEMENTS, DEPOSIT RECORDS AND THE LIKE	☐

5.FOR SHARES OWNED BY THE DECEASED (INCLUDING WITH ANOTHER): DETAILS OF THE COMPANY, A RECENT DIVIDEND STATEMENT, AND THE SRN FOR EACH COMPANY	☐
6.FOR MOTOR VEHICLES OWNED BY THE DECEASED (INCLUDING WITH ANOTHER): 6.1 registration papers or the registration number, make, model and year, and 6.2 an estimate of the value of each motor vehicle	☐
7.FOR THE DECEASED'S CONTENTS: 7.1 details, such as a description of the contents, 7.2 the estimated value of each item of contents separately given, and 7.3 insurance details for the contents	☐
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.	☐
9.IF THE DECEASED WAS LODGING, OR WAS REQUIRED TO LODGE, TAX RETURNS: 9.1 Name and address of deceased's accountant 9.2 Last tax return and notice of assessment, or the deceased's TFN	☐
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	☐

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11.IF THE DECEASED WAS A MEMBER OF A SUPERANNUATION FUND: 11.1 name of superannuation fund and membership number 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) 11.3 last statement received from superannuation fund	☐
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)	☐
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)	☐
14.IF THE DECEASED RECEIVED A PENSION: THE CENTRELINK REFERENCE NUMBER (CRN) OR DVA NUMBER	☐
15.IN RELATION TO MEDICAL BENEFITS: 15.1 the deceased's Medicare number, and 15.2 the name of any medical benefits fund and membership number	☐
16.WHERE THE DECEASED OCCUPIED A RESIDENCE: DETAILS OF UTILITIES, SUCH AS ELECTRICITY SUPPLIER, GAS SUPPLIER, TELEPHONE PROVIDER, AND THE LIKE	☐

GET
IN TOUCH

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