

DECEASED CUSTOMER NOTIFICATION



Membership details

Member number _____ Date _____

Full name of deceased member _____

Date of death _____

Linked member numbers 1. _____ 2. _____ 3. _____

Details of person notifying Heritage

Relationship to member _____

Surname _____ Given names _____

Signature of notifying person _____

Details of executor/administrator

Executor/administrator 1

Title _____ Surname _____ Given names _____

Mail address _____

Suburb _____ State _____ Postcode _____

Phone number _____ Email _____ Date of birth _____

Signature of executor/administrator _____

Executor/administrator 2

Title _____ Surname _____ Given names _____

Mail address _____

Suburb _____ State _____ Postcode _____

Phone number _____ Email _____ Date of birth _____

Signature of executor/administrator _____

Estate administration details

Is a solicitor assisting with estate administration process of the bank accounts? Yes No

Evidence of death

Evidence of your loved one's death will need to be supplied to Heritage with this completed form. Please provide a certified copy of the Medical Cause of Death Certificate OR funeral account OR Death Certificate to your local Heritage Branch. Heritage Bank Deceased Estates, PO Box 190, Toowoomba Qld 4350.

Branch use only

Freeze type '6' applied (if membership is a single membership or all to sign)

Evidence received - KYC and ID for executors collected, completed addition of party form and added to membership

Evidence received - Name changed to deceased on all memberships (TC22 'Z')

Prosper procedure completed

Place all PP's on hold (if membership is a single membership or all to sign)

Ensure all documents received are scanned to Lending Connect and originals forwards to BOPs.