

# DECEASED ESTATE CLAIM FOR ASSETS – DECLARATION AND INDEMNITY



If you've recently lost a family member we understand that this can be an emotional time and practical matters can seem overwhelming. Please know that we are happy to give you any help, support or guidance - just drop into a branch or call us any time on 13 14 22.

## About this form

This form is to be completed by the executors/ administrators or next of kin if the combined account balances held with Heritage Bank are less than \$50,000 and the executors/ administrators do not intend to apply for a Grant of Probate or Letters of Administration.

In some instances after reviewing the documentation received, Grant of Probate or Letters of Administration may still be required.

A Grant of Probate or Letters of Administration will be required in all instances when the balances held with Heritage Bank are greater than \$50,000.

## Required Documents

- Must be signed by each of the executors/administrators/next of kin, and their signature witnessed by a Justice of the Peace/ Commission of Declarations/ Solicitor.
- Must be submitted with the required:
  - Death Certificate
  - Will – Note: if the deceased left a Will this form must be signed by each executor to the Will.
  - Identification for each executor/administrator/next of kin.

## Deceased customer details

Deceased's full name(s): \_\_\_\_\_

### Certified copy of Death Certificate provided/attached?

What was the marital status of the deceased at the time of death?

Widowed    Separated    Married    Divorced    Never married    In a domestic relationship

Was the deceased survived by a living spouse?    Yes    No    If yes, please provide the name and address of spouse

Full name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_ State: \_\_\_\_\_ Postcode: \_\_\_\_\_

## Will details

Did the deceased leave a Will?    Yes    No    Not known    If you answered 'Yes', please attach a certified copy of the Will.

Note: If the deceased did not leave a Will, then the administrator/next of kin will need to complete our estate documentation.

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## Details of the Next of Kin

a) Please list the children of the deceased who are living, including children of any prior marriage or relationship:

*Note: "Children" includes adoptive children, step-children and children born after the deceased's death.*

Name	Address

b) Please list the surviving grandchildren of any deceased children (not listed above) of the deceased:

Name of the deceased child of the deceased	Date of death	Surviving children of the deceased child of the deceased	
		Name	Address

c) If the deceased **did not** have any children or **has** deceased children, provide details of the deceased's immediate family:

(only complete if you **did NOT** complete section a) above)

Name of deceased's father \_\_\_\_\_ Living Deceased

Name of deceased's mother \_\_\_\_\_ Living Deceased

Please provide details of the deceased's brothers and sisters who are living:

Name	Address

## Assets and Liabilities of the Estate

The Heritage Bank assets and liabilities are as follows:

Assets (all Heritage Bank accounts. Include membership number & account type)	Amount	Liabilities (all Heritage Bank loans and credit cards. Include membership number & loan type)	Amount
<b>Total:</b>	<b>\$</b>	<b>Total:</b>	<b>\$</b>

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## Declaration and Indemnity

1. I am/we are the      Executor(s)      Administrator(s)      Next of Kin  
as named in the last known Will and Testament of the deceased  
  
OR  
  
entitled to claim under the Laws of Intestacy.  
  
and as such do hereby claim to be entitled to the assets of the deceased's accounts held by Heritage Bank Limited.
2. In view of the size of the estate I/we are not applying for Grant of Probate/Letters of Administration.
3. I/We state there is no dispute pertaining to the terms of the Will or distribution of the estate and that there are no known persons who may lodge a claim on the estate.
4. I/We undertake to firstly apply the estate's assets in payment of any debts due by the deceased and promise and further agree to hold Heritage Bank indemnified against all actions, suits, claims or demands which may be brought or made upon Heritage Bank and also against all losses, costs, charges and expenses which Heritage Bank may incur or be liable for as a result of Heritage Bank paying me/us the assets held.
5. I/We acknowledge that the information, authorities and payment instructions provided in this form are true and correct.
6. I/ We have read and agree to the Heritage Bank's Privacy Policy and have the authority to provide the personal information I/ we have provided.

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## Executor/Administrator details

I/We make this solemn declaration by virtue of the Statutory Declarations Act 1959 (Commonwealth), and subject to the penalties provided by that Act for the making of false statements in statutory declarations, conscientiously believing the statements contained in this declaration to be true in every particular.

### Executor/ Administrator/ Next of Kin 1

Signed and declared by (Full name of executor/administrator/next of kin) \_\_\_\_\_

at \_\_\_\_\_ on \_\_\_\_ / \_\_\_\_ / \_\_\_\_

in the presence of: \_\_\_\_\_

Signature of executor/administrator/next of kin \_\_\_\_\_

Signature of Justice of the Peace/ Commission of Declarations/ Solicitor \_\_\_\_\_

### Executor/ Administrator/ Next of Kin 2

Signed and declared by (Full name of executor/administrator/next of kin) \_\_\_\_\_

at \_\_\_\_\_ on \_\_\_\_ / \_\_\_\_ / \_\_\_\_

in the presence of: \_\_\_\_\_

Signature of executor/administrator/next of kin \_\_\_\_\_

Signature of Justice of the Peace/ Commission of Declarations/ Solicitor \_\_\_\_\_

### Executor/ Administrator/ Next of Kin 3

Signed and declared by (Full name of executor/administrator/next of kin) \_\_\_\_\_

at \_\_\_\_\_ on \_\_\_\_ / \_\_\_\_ / \_\_\_\_

in the presence of: \_\_\_\_\_

Signature of executor/administrator/next of kin \_\_\_\_\_

Signature of Justice of the Peace/ Commission of Declarations/ Solicitor \_\_\_\_\_

### Executor/ Administrator/ Next of Kin 4

Signed and declared by (Full name of executor/administrator/next of kin) \_\_\_\_\_

at \_\_\_\_\_ on \_\_\_\_ / \_\_\_\_ / \_\_\_\_

in the presence of: \_\_\_\_\_

Signature of executor/administrator/next of kin \_\_\_\_\_

Signature of Justice of the Peace/ Commission of Declarations/ Solicitor \_\_\_\_\_

**Please return completed form to:** Heritage Bank, Deceased Estates, PO Box 190, Toowoomba Qld 4350 or alternatively these forms can be handed into one of our Branches.