

DECEASED ESTATE CLAIM FOR ASSETS (UNDER \$50,000) – DECLARATION AND INDEMNITY

If you've recently lost a loved one we understand this can be an emotional time. Finalising their financial accounts can seem overwhelming, which is why we are available to offer our help, support or guidance during this process. Please drop in to your nearest Branch, call us any time on 13 14 22 or refer to our support information at heritage.com.au/deceasedestates

About this form

This form is to be completed by the executor(s) / administrator(s) or next of kin to request the closure and distribution of a deceased member's account(s) where the combined account balances held with Heritage Bank are less than \$50,000 and the administrators or next of kin do not intend to apply for a Grant of Probate or Letters of Administration.

In some instances after reviewing the documentation received, we may still require Grant of Probate or Letters of Administration before we will close the account(s).

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

- This form must be signed by each of the executor(s) / administrator(s) or next of kin, and their signature witnessed by a Justice of the Peace/ Commission of Declarations/ Solicitor.
- Certified copies of the following supporting documents must be submitted:
 - 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(s) / administrator(s) or next of kin.

Deceased member 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 de facto 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.

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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, except to the extent caused by Heritage's fraud, negligence or wilful misconduct (including that of Heritage's officers, employees, contractors or agents).

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(s) / Administrator(s) or Next of Kin

I/we understand that a person who intentionally makes a false statement in a statutory declaration is guilty of an offense under section 11 of the Statutory Declarations Act 1959 (Cth), and I/we believe that the statements in this declaration are 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 (Full name of witness): _____

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 (Full name of witness): _____

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 (Full name of witness): _____

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 (Full name of witness): _____

Signature of executor/administrator/next of kin _____

Signature of Justice of the Peace/ Commission of Declarations/ Solicitor _____

Return Details

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