



# Deceased Estate Expense Payment Request Form

As part of helping you with estate expenses, we may allow certain one-off payments up to \$15,000 and some ongoing costs to be withdrawn from accounts that are essential for the maintenance of the estate. These may include:

- Funeral and memorial costs
- Rate payments (if the property is solely in the deceased's name)
- Service provider costs for a property that's solely in the deceased's name, such as:
  - Water rates
  - Electricity/gas bills
- Service provider final payments for the deceased, such as:
  - Internet service
  - Landline phone or mobile phone
- Loan repayments for loans held with us that are solely in the name of the deceased
- Application fee to the court for Probate

To request payment of a cost associated with the estate you will need:

- To complete this form signed by all the next of kin if there is no Will or by the executor if there is a Will
- A copy of the bill that is to be paid
- Please forward them to us:

✉ [estatesmanagement@westpac.com.au](mailto:estatesmanagement@westpac.com.au)

🏠 Estates Centre of Excellence - Mailstop 30.A.3  
GPO Box 3433  
Sydney NSW 2001

📍 By visiting a branch

## Section 1: Details

### Details of the deceased.

First Name

Surname

Date of Death

Customer Number

Date of Birth

### Details of the person requesting payment from account.

First Name

Surname

Reference Number

Phone Number

**Section 2: Requested Estate Expense to be paid**

#	Who are we paying?	Which account are we paying from?		Invoice amount	Paid at Branch
1		BSB:	ACC No:	\$	<input type="checkbox"/>
2		BSB:	ACC No:	\$	<input type="checkbox"/>
3		BSB:	ACC No:	\$	<input type="checkbox"/>
4		BSB:	ACC No:	\$	<input type="checkbox"/>

**Note:** If you are seeking reimbursement for an invoice that has already been paid, a tax invoice/receipt from the supplier must evidence that the bill has been paid and by whom. A bank cheque will be drawn in their name.

If reimbursement, please supply mailing details of where the bank cheque is to be sent.

**Bank cheque details (for reimbursements only).**

Mailing Address

I/We acknowledge that if funds are withdrawn from the specified account that this may affect any interest payable on the account (if interest or bonus interest is applicable).

I/We understand that if a Term Deposit needs to be broken to pay the requested amount any remaining money will be reinvested in a Term Deposit for the same period and same interest payment frequency at the current interest rate.

I/We agree and request payment of this money.

I/We undertake to reimburse the bank for this money and any other costs if it is subsequently proved that I am not entitled to it.

Relationship to the Deceased

Signature

X

Date

/ /

### Section 3: Branch details

If this form is completed at the Branch, please complete the details below.

- Please ensure the request does **not** relate to the payment of:
  - Solicitor fees
  - Bills on a property that was jointly owned
  - Travel costs for family members to attend memorials or funeral services
  - Loans held with other financial institutions
  - Any other costs that are not directly associated with the estate itself
- Please ensure the invoices are forwarded to the Estates Centre of Excellence for processing if greater than \$15,000.

**IMPORTANT!** Branch Staff must Indicate if the invoice has been paid at the branch.

Branch Name:

BSB:

Employee First Name:

Employee Surname:

Salary No:

Date: