

Deceased Customer Notification & Estate Form

About this form

We understand there may be a lot to manage right now. Complete this form to let us know about a customer's passing and to tell us who is submitting the notification (you or your representative). This allows us to take steps to protect accounts and progress estate enquiries once authority is confirmed.

Sections marked with an asterisk (*) must be completed.

How to complete this form

Section 1: Details of the deceased*

Provide details about your loved one, including their personal details, residential address (at time of passing), and which Westpac Group Brand(s) they held accounts with (if known).

Section 2: Your details*

Complete your details as the person notifying us or managing the estate.

- If you are **only notifying us of the passing** and do not yet have documents confirming that you are the authorised representative, tick **"Other"** and write your relationship (for example, spouse, sibling, family member).
- You can return later to complete the estate representative section when you have the required documents.

If there are more than two estate representatives and there is no additional space on this form, a separate form must be completed. In this case, Sections 1, 2, 6A and 7 must be completed to confirm each additional estate representative.

Helpful note: We ask for your identification so we can confirm who we're dealing with and help protect the estate.

Section 3: Funeral expense – if applicable

This section is only required if there is a funeral invoice that needs to be paid.

If a funeral expense needs to be paid, please:

Tick yes in Section 3 – Funeral expense

- Attach a copy of the funeral invoice (this must include the date of death)
- Attach Certified ID of the person submitting this Form
- Ensure this form is completed

Please note: The funeral invoice will be paid directly to the funeral service provider. We're unable to make this payment to an individual.

Requests for reimbursement of acceptable estate expenses may only be made by an authorised estate representative.

In addition to this form and the required certified documents, a Deceased Estate Instructions & Expense Payment Form must also be completed.

Section 4: Low balance account(s) – if applicable

Please only complete this section if the balance of the account(s) is \$5 or less.

This section allows us to close low value accounts and finalise them without delay.

You will be asked to confirm whether you:

- Allow the Westpac Group to close account(s) with a zero balance, or
- Allow the Westpac Group to donate any balance of \$5 or less to a charity of Westpac's choice and close the account(s)

Please note: Only one option should be selected.

Section 5: Estate information*

Tell us whether:

- There is a Will, and
- Probate or Letters of Administration have been:
 - Granted,
 - Applied for and awaiting outcome,
 - Not yet applied for but intended, or
 - Not being applied for

This helps us understand the next steps for managing the estate.

Section 6A: Declaration*

In Section 6A, please tell us what you are asking us to do by ticking one or both options that apply to you.

- **Tick the first option:** if you are notifying us of the customer's death and/or requesting payment of a funeral invoice. You do not need to be an authorised representative to do this.
- **Tick the second option:** if you are asking to act on behalf of the estate and receive information about the estate. This may apply if you are a Next of Kin, Executor, Administrator, or another person managing the estate.
- **Tick both options:** if you are notifying us of the death and intend to manage the estate.

We can only share estate information or act on instructions once your authority has been confirmed using the required documents.



Section 6B: Multiple Estate Representative(s) – Primary contact nomination – if applicable

Only complete this section if:

- There is more than one executor, and
- You wish to nominate one contact person for estate communications

All executors must agree and sign this section.

Section 7: Document checklist*

Please tick and attach the documents that apply to you:

- **Certified** copy of Death Certificate / Medical / Police Report / Funeral Invoice (must include date of death)
- **Certified** copy of Will (if available)
- **Certified** copy of Identification documents of the person submitting this form (required to verify identity, even if you are only notifying us or requesting payment of a funeral expense)
- **Certified** copy of Probate / Letters of Administration (if granted)

Additional documents (if applicable)


- **Solicitor Acting:** Letter on firm letterhead
- **Public Trustee:** Letter confirming appointment


How to notify us

You can notify us and submit this form in any of the following ways:


Westpac


 **Email**
estatesmanagement@westpac.com.au


 **Post**
Estates Management – Mailstop 28.A.1
GPO Box 3433
Sydney NSW 2001

 **In person**
By visiting a Westpac branch.

St.George Bank, BankSA and Bank of Melbourne

 **Email**
St.George Bank: estatesmanagement@stgeorge.com.au
BankSA: estatesmanagement@banksa.com.au
Bank of Melbourne:
BOMestatesmanagement@bankofmelbourne.com.au

 **Post**
Estates Management – Mailstop 28.A.2
GPO Box 3433
Sydney NSW 2001

 **In person**
By visiting a Branch (BankSA, St.George or Bank of Melbourne)


We recommend making an appointment before visiting a branch. Please allow approximately 45 minutes for this appointment.

What happens next

Once we receive this form and the required documents, we'll secure the customer's accounts and start the next steps. We'll write to you within 14 business days if we need anything else, and to explain how funds can be released to the estate. You can take the time you need – there's no requirement to complete everything at once.

Please refer to the Support Guide for information on what is required at each stage, possible outcomes, and the next steps once this form is submitted.

Our Estates Management team can be contacted on:

 **1300 130 240** (Westpac), **1300 130 549** (St.George Bank, BankSA and Bank of Melbourne), Monday–Friday, 9am–5pm AEST. Calling from overseas: +61 2 9155 7590.



Section 1: Details of the deceased*

Full name (including any middle names)

Date of birth

Date of death

Customer number

BSB

Account number

Residential address (at time of death)

Which bank brand(s) did your loved one hold accounts with? (You may tick more than one)

Westpac

St.George

BankSA

Bank of Melbourne

Section 2: Your details (notifier or authorised estate representative)*

Notifier or authorised representative 1

Relationship to the deceased – (Please tick the option that best describes your relationship)

Partner

Child (over 18)

Parent

Sibling

Other (please specify):

Full name

Mailing address

Email address

Mobile number

Your role in management of the estate:

Executor / Administrator

Next of Kin

None / Unsure

Preferred method of communication (please select one):

Email

Letter (sent to the postal address provided above)

Has a solicitor been (or will be) engaged to manage the estate?

Yes

No

Please note: If a solicitor has been (or will be) engaged to manage the estate, we will wait for them to contact us to confirm that they act on behalf of the estate. From that point onwards we will direct any correspondence to their office.



Notifier or authorised representative 2

Relationship to the deceased – (Please tick the option that best describes your relationship)

Partner Child (over 18) Parent Sibling Other (please specify):

Full name

Mailing address

Email address

Mobile number

Your role in management of the estate:

Executor / Administrator Next of Kin None / Unsure

Preferred method of communication (please select one):

Email Letter (sent to the postal address provided above)

Has a solicitor been (or will be) engaged to manage the estate?

Yes No

Please note: If a solicitor has been (or will be) engaged to manage the estate, we will wait for them to contact us to confirm that they act on behalf of the estate. From that point onwards we will direct any correspondence to their office.

Section 3: Funeral expense – if applicable

Is there a funeral invoice that needs to be paid? (Please tick one option)

No (go to next section) Yes, please attach:

- A copy of the funeral invoice, and
- The required documents listed on page 1

Which Account from the estate are we paying from?

If unknown, leave blank. Westpac will arrange payment from the deceased customer account(s) that hold sufficient funds to meet the expense.

BSB

Account number

Details of the invoice to be paid:

Payee's name

BSB

Account number

Invoice amount

Paid by branch

Please note: The funeral invoice will be paid directly to the funeral service provider.

Section 4: Low balance account(s) – if applicable

Please only complete this section if the balance of the account(s) is \$5 or less. This allows us to close low value accounts and finalise them without delay.

I/We allow the Westpac Group to close account(s) with a zero balance.

I/We allow the Westpac Group to donate any balance of \$5 or less to a charity of Westpac's choice and to close the account(s).



Section 5: Estate information*

Is there a Will? Yes No Unsure

Have you been granted Probate or Letters of Administration? (Please tick one option)

Probate or Letters of Administration are court issued documents that confirm who is legally authorised to manage a deceased person's estate. Probate applies when there is a Will. Letters of Administration apply when there is no Will.

Yes – granted (please attach a certified copy)

Yes – applied and awaiting outcome

No – but intend to apply

No – not applying

Important note: If you select No – not applying, please note that depending on the estate, we may still require Probate or Letters of Administration to proceed. If this is required, we will clearly outline this position to you in correspondence.

Section 6A: Declaration*

Please read and complete this declaration.

You may tick one or both options below, depending on what you are asking us to do.

Option 1 – Notification and/or funeral payment

Tick this option if you are:

- notifying us of the customer's death, and/or
- requesting payment of a funeral invoice.

You do not need to be an authorised estate representative to select this option.

Option 2 – Acting on behalf of the estate (Authorised estate representatives only)

Tick this option if you are asking to:

- act on behalf of the estate, and
- receive information about the estate once your authority has been verified.

This may apply if you are the Next of Kin, Executor, or Administrator

I confirm that:

- the information I have provided is true and correct.

and I understand that:

- notifying Westpac Group of a customer's death or requesting payment of a funeral invoice does not give me authority to manage the estate or receive estate information; and/or
- if I have requested to act on behalf of the estate, Westpac Group will only share estate information and act on my instructions once my authority has been verified using the required documentation (for example, Probate or Letters of Administration, or where there is no Will, confirmation that I am the Next of Kin in line with the order of succession as per the Death Certificate or other acceptable evidence).

Signature

Date

Please ensure your signature matches the ID documentation provided.



Section 6B: Multiple Estate Representative(s) – Primary contact nomination – if applicable

Complete this section only if there is more than one Executor, Administrator, or Next of Kin, you are authorised to act for the estate (with no solicitor acting on behalf of the estate), and you would like to nominate one person as the primary contact for estate communications. This nomination relates to delivery of correspondence only and does not alter the responsibilities of each Executor or Administrator to make decisions in accordance with the Will or the Letters of Administration.

Nomination of primary contact

We agree to nominate the following person as the primary contact for all estate communications with Westpac Group.

Primary contact full name

Please note: If the nominated primary contact is not the person listed in Section 2 (Your details), please provide their details below.

Estate Representative(s) declarations

Each executor or administrator must complete one declaration below.
(Including the nominated primary contact, if they are not the person listed in Section 2.)

Estate Representative 1 ***(Next of Kin, Executor or Administrator)***

Full name

Mailing address

Email address

Westpac Group customer number (if known)

Signature

Date

Please ensure your signature matches the ID documentation provided.

Estate Representative 2 ***(Next of Kin, Executor or Administrator)***

Full name

Mailing address

Email address

Westpac Group customer number (if known)

Signature

Date

Please ensure your signature matches the ID documentation provided.



Estate Representative 3
(Next of Kin, Executor or Administrator)

Full name

Mailing address

Email address

Westpac Group customer number (if known)

Signature

Date

Please ensure your signature matches the ID documentation provided.

Section 7: Document checklist*

Use this checklist to confirm which documents you are providing with this form. This helps us understand what information you have already supplied and allows us to process your request as efficiently as possible.

What does “certified copy” mean and why is it important?

A certified copy is a copy of an original document that has been confirmed as a true and accurate copy by an approved certifier. Certification helps protect against fraud and ensures we can rely on the documents when managing the estate.

If the required certified documents are not provided, this may result in delays in processing while we follow up or request further information.

Please refer to page 9 for a list of approved categories of certifiers.

Certified copy of Death Certificate / Medical / Police Report

Certified copy of Will (if available)

Certified copy of Probate / Letters of Administration (if granted)

Certified copy of Identification documents

Privacy statement

All personal information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at westpac.com.au/privacy/privacy-statement or by calling us on **132 032**.

Our Privacy Statement also provides information about how you can access and correct your personal identification, and make a complaint. You do not have to provide us with any personal information, but if you don't, we may not be able to process your request.

Other acknowledgements and consents

Where you have provided information about another individual, you must make them aware of the fact.

Tax reporting obligations

We are required under domestic and international laws to collect and report financial and account information relating to individuals and organisations who are, or may be, foreign tax residents. We may ask you whether you or any shareholder, beneficiary, settlor or controlling person are a foreign tax resident from time to time, such as when you open an account with us, or if your circumstances change. If you do not provide this information to us, including information about the foreign tax identification number for all countries you or any shareholder, beneficiary, settlor or controlling person are a foreign tax resident of, we may be required to limit the services we provide to you.



Unless you tell us otherwise, by completing this form, you certify that you, any shareholder, named beneficiary, settlor or controlling person is not a foreign tax resident. You must tell us if you, or any shareholder, named beneficiary, settlor or controlling person is, or becomes, a foreign tax resident (unless an exemption applies, such as for shareholders of listed companies).

Where there are no named beneficiaries (e.g. for beneficiaries identified only as a class) you must tell us if a beneficiary is a foreign tax resident immediately when any decision is made to identify such beneficiary and, in any case, before such distribution is to be made to them. You may contact us to provide foreign tax residence information by calling 1300 725 863. We cannot give tax advice, so please contact your independent tax advisor if you need help finding out whether any person is a foreign tax resident.

Definitions.

“We”, “our”, “us” means Westpac Banking Corporation ABN 33 007 457 141.

Office use only

Branch name

BSB

Employee salary ID

Employee first name

Employee surname

Date



Category of certifiers

The following people can certify the customer's identification documents)

Inside Australia.

- A person who, under a law in force in a State or Territory, is currently licensed or registered to practise in one of the following occupations:
 - Chiropractor
 - Veterinary surgeon
 - Dentist
 - Trademarks attorney
 - Legal practitioner
 - Psychologist
 - Medical practitioner
 - Physiotherapist
 - Nurse
 - Optometrist
 - Patent attorney
 - Pharmacist
- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described)
- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
- Bailiff
- Bank officer with 2 or more continuous years of service
- Building society officer with 2 or more years of continuous service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Credit union officer with 2 or more years of continuous service
- Employee of the Australian Trade and Investment Commission who is:
 - in a country or place outside of Australia; and
 - authorised under paragraph 3(d) of the *Consular Fees Act 1955*; and
 - exercising his or her function at that place
- Fellow of the National Tax Accountants' Association
- Finance company officer with 2 or more years of continuous service
- Holder of a statutory office not specified elsewhere in this table
- Judge of a court
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the *Marriage Act 1961*
- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australian Defence Force who is:
 - an officer; or
 - a non-commissioned officer within the meaning of the *Defence Force Act 1982* with 2 or more years of continuous service; or
 - a warrant officer within the meaning of that Act
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- Member of:
 - the Parliament of the Commonwealth; or
 - the Parliament of a State; or
 - a Territory legislature; or
 - a local government authority of a State or Territory
- Notary public
- Permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- Permanent employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a State or Territory or a State or Territory authority; or
 - a local government authority, with 2 or more years of continuous service and is a person not already specified elsewhere in this table
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a State or Territory or a State or Territory authority
- Sheriff/Sheriff officer
- Teacher employed on a full-time basis at a school or tertiary education institution
- Member of the Australasian Institute of Mining and Metallurgy
- An officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licensees
- An officer with, or a credit representative of, a holder of an Australian credit licence, having 2 or more years of continuous service with one or more licensees



Outside Australia.

- A legal practitioner who holds a current practicing certificate under a law in force in a State or Territory in Australia
- An officer of an Australian bank, building society or finance company branch or office located in a foreign jurisdiction with 2 or more years of continuous service
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
- Employee of the Australian Trade and Investment Commission who is:
 - in a country or place outside of Australia; and
 - authorised under paragraph 3(d) of the *Consular Fees Act 1955*; and
 - exercising his or her function at that place
- Employee of the Commonwealth who is:
 - in a country or place outside Australia; and
 - authorised under paragraph 3(c) of the *Consular Fees Act 1955*; and
 - exercising his or her function in that place
- Judge of a court or Magistrate
- Registrar, or Deputy Registrar, of a court
- A person authorised as a notary public in a foreign jurisdiction
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- A person who is authorised by law in the relevant jurisdiction to administer oaths or affirmations or to authenticate documents.

Identification documents

Primary photographic identification documents.

- Valid Australian driver licence/learner's permit or any other licence issued by a State or Territory government department. Containing a:
 - Photograph;
 - Date of issue, or expiry;
 - Licence number; and
 - Date of birth.
- Foreign driver licence/permit
- Australian passport (can either be current or expired within the last 2 years but must not be cancelled, defaced or mutilated)
- Foreign passport issued by a foreign government, the United Nations or an agency of the United Nations (must not be cancelled, defaced or mutilated) which contains either a signature OR a unique identifier of the person.
- Foreign travel document issued by a foreign government, the United Nations or an agency of the United Nations (must be current if there is an expiry date on the document, and not be cancelled, defaced or mutilated) which contains either a signature OR a unique identifier of the person

- A photo card with proof of age issued by an Australian State or Territory for the purpose of proving a person's age. For example, a proof of age card, a proof of identity card, a photo identification card, a photo card, an evidence of age card and a personal information card.
- National identity card issued by a foreign government, the United Nations or an agency of the United Nations which contains either a signature OR a unique identifier of the person.

Primary non-photographic identification documents.

- Australian birth certificate (or extract) issued by a State or Territory
- Foreign birth certificate issued by a foreign government, the United Nations or an agency of the United Nations
- Australian citizenship certificate (including a Citizenship by Descent Certificate)
- Citizenship certificate issued by a foreign government
- Centrelink pension card (Australian)
- Centrelink health care card (Australian) Secondary identification documents.

Secondary identification documents.

- A notice issued by the Commonwealth or a State/Territory within the last 12 months that includes the Individual's name and residential address and records the provision of financial benefits (e.g. Centrelink notice)
- A notice issued by the Australian Taxation Office (ATO) within the last 12 months that includes the Individual's name and residential address and records a debt payable by or to the Individual (e.g. tax assessment)
- Utilities notice issued by a local government or utilities provider within the last 3 months and includes the Customer's full name and residential address and records the provision of a service to that address or name
- If the Individual is under the age of 18 years, notice issued by the principal of a school within the last 3 months, that includes the name of the Individual, residential address and period of school attendance
- Foreign driver licence which does not contain a photograph
- Department of Veterans' Affairs pension concession card (Australian)
- A current tenancy/lease agreement (must not be cancelled or expired)
- Medicare card
- Australian Marriage certificate issued by State/Territory Registry of Births, Deaths and Marriages
- Identification card issued to a student at an Australian higher education institution (TAFE or University) which contains a photograph and signature
- A card issued under a Commonwealth, State, or Territory law for the purpose of identification, for a government service, or as a licence

