

DECEASED MEMBER NOTIFICATION

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 here:

heritage.com.au/deceasedestates

Deceased Member Details

Member number _____ Date _____

Full name of deceased member _____

Date of death _____ Date of birth _____

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

Details of person notifying Heritage

Relationship to member _____

Surname _____ Given names _____

Contact Number _____ Contact Email _____

Address details _____

Signature of notifying person _____ Preferred contact method _____

Are you an Executor/Administrator or Next of Kin? (if yes skip next section)

Details of Executor/Administrator or Next of Kin (if known)

Executor / Administrator or Next of Kin 1

Title _____ Surname _____ Given names _____

Mail address _____

Suburb _____ State _____ Postcode _____

Phone number _____ Email _____ Date of birth _____

Signature of Executor/Administrator or Next of Kin _____ Preferred contact method _____

Executor/Administrator or Next of Kin 2

Title _____ Surname _____ Given names _____

Mail address _____

Suburb _____ State _____ Postcode _____

Phone number _____ Email _____ Date of birth _____

Signature of Executor/Administrator or Next of Kin _____ Preferred contact method _____

Estate administration details

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

If yes, we will wait for further instructions from your solicitor.

Evidence of death

Please provide a certified copy of the Medical Cause of Death Certificate OR funeral account OR Death Certificate to your local Heritage Branch. Alternatively, you can post this to: Heritage Bank Estate Management, PO Box 190, Toowoomba Qld 4350.

Medical Cause of Death Certificate Funeral Account Death Certificate

Section 3 - Will/Probate details (This will help determine what documents you will need to provide to us)

Is there a Will?

Yes
 No
 Unsure

For balances totaling \$50,000 or more

Has anyone applied (or is intending to apply) for Probate?

Yes
 No
 Unsure

Has anyone applied (or is intending to apply) for Letters of Administration?

Yes
 No
 Unsure

Certified copies of the aboved mentioned documents will be required to finalise the estate.

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

Branch stamp:	MEO Signature	Checked By:	Branch Checking	Scanned to Lending Connect