

Deceased Estate Guide

Type of account	Outcome required	Paperwork required	Outcome achieved
Single account	Executor/s want a redemption.	<ul style="list-style-type: none"> • Certified copy of Probate (or Letters of Administration if member died intestate). • Original letter signed by all Executors requesting redemption of the account, including bank account details. • Certified copy of Death Certificate¹. • Certified copy of Will¹. 	Funds paid to the bank account linked to the investor unless duly completes Change of Details Form received.
	Executor/s want a transfer/transmission	<ul style="list-style-type: none"> • Certified copy of Probate (or Letters of Administration if member died intestate). • Original letter signed by all Executors requesting transfer/transmission of the account. • Standard Transfer Form signed by all Executors (not required for transmission). • Tax File Number of new account holder. • Completed and signed Application Form and Client Identification Forms. • Certified copy of Death Certificate¹. • Certified copy of Will¹. 	Account name changed to "Estate Of The Late..." and a new investor number is created in the beneficiaries/Executor's name and funds are transferred.
	Executor/s want a partial transfer and partial redemption.	<ul style="list-style-type: none"> • Certified copy of Probate (or Letters of Administration if member died intestate). • Original letter signed by all Executors requesting partial redemption of account and partial transfer. • Standard Transfer Form signed by all Executors. • Tax File Number of new account holder. • Completed and signed Application Form and Client Identification Forms. • Certified copy of Death Certificate¹. • Certified copy of Will¹. 	<p>Account name changed to "Estate Of The Late..." and a new investor number is created in the beneficiaries' name.</p> <p>Percentage of account transferred in accordance with executors instructions.</p> <p>Funds paid to the bank account linked to the investor unless duly completes Change of Details Form received.</p>
Joint account*	Surviving joint account holder(s) want to retain account.	<ul style="list-style-type: none"> • Certified copy of Death Certificate. 	Account name changed to surviving joint account holder(s).
	Surviving joint account holder(s) wish to redeem account.	<ul style="list-style-type: none"> • Certified copy of Death Certificate. • Original letter signed by surviving joint account holder(s) indicating the wish to redeem the account. 	Funds paid to the bank account linked to the joint account unless duly completed Change of Details Form received.
Company /Trust / Self managed Super Account	Director/s or Trustee/s wants to appoint new signatory.	<ul style="list-style-type: none"> • Certified copy of Death Certificate. • New Deed of Appointment or minutes of a meeting appointing new signatory. • Note: If a sole trustee account holder dies, the Executor of the deceased trustee's estate may automatically replace the trustee under the applicable State legislation – if this is the case we would also need a certified copy of Probate (or Letters of Administration) & a copy of the Will. 	Deceased signatory removed and new signatory assigned to existing account.

*Not required if a certified copy of Probate is received.