

Deceased Estate Notification Form - Individuals

We are sorry for your loss and are here to help you at this difficult time.

This form will be used by The Perth Mint to identify accounts held by the deceased. Where possible, this form should be completed by the deceased's representative (e.g. estate executor, next-of-kin or legal representative).

For support completing this form, please call +61 8 9421 7237.

Unless otherwise stated, all **copies** of documents must be certified or notarised. **For instructions on how to certify or notarise a document, please see the instructions in section 4 of this form under the heading 'How do I certify or notarise documents?'.**

Once you've completed this form, see the "Next Steps" section to understand what to do next.

1. Details of the Deceased

First Name

Middle Name

Surname

Date of Death (DD/MM/YYYY)

Date of Birth (DD/MM/YYYY)

Perth Mint Customer Number/Email address (if known)

Residential Address

Suburb

State

Postcode

2. Will / Probate details

Is there a Will?

Yes No Unsure

If answered 'Yes', please provide a certified or notarised copy of:

- the deceased customer's full death certificate; and
- the deceased customer's last will and testament.

If answered 'No' or 'Unsure', please provide:

- a certified or notarised copy of the deceased customer's full death certificate; and
- **EITHER:**
 - a statutory declaration swearing or affirming that the account holder passed away intestate and that you are the next-of kin entitled to apply for Letters of Administration; or
 - if you have already obtained Letters of Administration, a certified or notarised copy of that document.

The immediate surviving next-of-kin (in order of priority) is generally the deceased person's spouse, de-facto/ domestic partner (if you were in a continuous relationship of more than 2 years at time of their passing), children, grandchildren, parents and siblings.

Has anyone applied (or is intending to apply) for a grant of **Probate** or **Letters of Administration**?

Yes No Unsure

If you have already received a grant of Probate or Letters of Administration in accordance with our requirements, you may be able to complete the Authority to Release Assets Form (**ARA Form**) found on here our [website](#) at the same time you complete this form (note that both forms are always required to be complete).

Please carefully review the ARA Form to understand which documents we will need as, for some estates, we will require a grant of Probate or Letters of Administration to be ordered in the State of Western Australia.

3. Notifier's Details

We can only share account information with a **Legal Representative** or an **Authorised Representative** of the estate.

An **Authorised Representative** is the executor, administrator or immediate surviving next-of-kin.

A **Legal Representative** is a solicitor instructed to act on behalf of an Authorised Representative.

Relationship to the Deceased:

Executor/Administrator Next of Kin Legal Representative

Other (please specify)

First Name

Middle Name

Surname

Residential Address

Suburb

State

Postcode

Phone/Mobile Number

Email

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

Yes No

If yes, name and contact details:

4. Identification of Notifier

4A. If you are a **Legal Representative**, please provide a letter of representation stating you are the Legal Representative and act for the estate.

4B. If you are an **Authorised Representative**, please provide identification documents via one of the below options:

Option 1: Provide us with your current Perth Mint account number if you are an existing customer.

Perth Mint Customer Account Number:

Option 2: Provide certified or notarised copies of the listed identification documents below to verify full name **AND** residential address:

Provide one current Primary Photographic document:

- Australian driver's licence.
- Australian Passport.
- International Passport or Foreign National Identity Card issued by foreign government.
- Proof of Age card (Australian State or Territory).

Please ensure the primary photographic document contains your address. If it does not contain your address, please provide an additional document (photographic, non-photographic or Secondary Document) to enable us to verify your address.

OR

Two current Primary Non-Photographic Documents:

- Australian or foreign birth certificate (or extract).
- Australian or foreign citizenship certificate.
- Pension or Health care card issued by Centrelink or Department of Veterans' Affairs pension.
- Australian driver's licence (which does not contain a photograph of you).

OR

One current Primary Non-Photographic Document **AND** one current Secondary Document (i.e. total two items):

- A notice from the Commonwealth / State or Territory clearly showing your full name, residential address and any financial benefits paid to you (issued within the past 12 months).
- An Australian Tax Office notice clearly showing your full name and residential address (issued within the past 12 months).
- A utilities notice from a local government body or utility provider clearly showing your full name, residential address and services provided to you (issued within the past 3 months).
- Your overseas driver's licence.
- Your Commonwealth/State or territory security guard/crowd safety officer ID card.

How do I certify or notarise documents?

Copies of each identification document must be certified or notarised. To certify or notarise your documents, you must bring the original document and a copy of the original to a prescribed person (see **Annexure A** for a list of prescribed persons). The prescribed person will need to examine the original document and certify or notarise the copy of the document in accordance with the instructions in **Annexure A**.

What if my documents aren't in English?

If your identification documents are not in English, then a translation of each document is required. All translations must be completed by a translator who is accredited by the National Accreditation Authority for Translators and Interpreters or equivalent.

What happens if the name on the identification document is different or has changed?

If the name on the identification document has changed since it was issued, then a Change of Name certificate, issued by the Registry of Births Deaths and Marriages must also be provided.

5. Release Funds and Close Accounts

To finalise the process, we will require the Legal Representative or Authorised Representative to provide authority and payment instructions, and final estate documents. You can do this by completing the ARA Form (available at www.perthmint.com/deceased-estates).

To complete the ARA, you may need to obtain a grant of Probate or Letters of Administration **in the State of Western Australia** depending on the value of the accounts.

Please review the ARA Form for further instructions on whether you are required to obtain a grant of **Probate** or **Letters of Administration** in the State of Western Australia, and what documents we will need to finalise the account.

6. Declaration

By completing this form, you:

1. confirm and warrant that all the information, including the identification material, provided in this form is true, valid, and correct; and
2. agree that the information you provide to us will be maintained in accordance with The Perth Mint's Privacy Policy (available at www.perthmint.com/privacy-policy).

Name

Signature

Date

7. Next Steps

Please send this form and all documents via the secure link provided.

Please note: we only require certified or notarised copies of the relevant documents. **Please do not send us original documents.**

We will review your form and, if all required documents have been received, we will provide you with a statement setting out account details and balance within 30 days.

Annexure A

List of Prescribed Persons

Professions listed as authorised witnesses by the *Oaths, Affidavits and Statutory Declarations Act 2005* can certify your identification documents in Australia. These include:

- Academic (post-secondary institution)
- Accountant
- Architect
- Australian Consular Officer
- Australian Diplomatic Officer
- Bailiff
- Bank Manager
- Chartered secretary
- Chemist
- Chiropractor
- Company auditor or liquidator
- Court officer (Judge, magistrate, registrar or clerk)
- Defence Force officer
- Dentist
- Doctor
- Electorate Officer (State - WA only)
- Engineer
- Industrial organisation secretary
- Insurance broker
- Justice of the Peace (any State)
- Landgate officer
- Lawyer
- Local government CEO or deputy CEO
- Local government councillor
- Loss adjuster
- Marriage Celebrant
- Member of Parliament (State or Commonwealth)
- Midwife
- Minister of religion
- Nurse
- Optometrist
- Paramedic
- Patent Attorney
- Physiotherapist
- Podiatrist
- Police officer
- Post Officer Manager
- Psychologist
- Public Notary
- Public Servant (State or Commonwealth)
- Real Estate agent
- Settlement agent
- Sheriff or deputy Sheriff
- Surveyor
- Registered Teacher
- Tribunal officer
- Veterinary surgeon
- an authorised person under the *Commonwealth Statutory Declarations Act 1959*

To notarise a document in Australia, a Justice of the Peace or a Notary Public can notarise your documents.

For overseas customers, the Commissioner for Oaths, Notary Public or Justice of the Peace can certify or notarise your identification documents.

Certifying documents with multiple pages

If the original is a multiple page document, each page must be checked against the copy to ensure that it is correct.

To certify the documents, the prescribed person will need to:

1. Sign or initial each page.
2. Number each page of the copy as 'page 1 of <total number of pages>', 'page 2 of < total number of pages>' etc.
3. Certify the last page as follows:

I certify that this <number of pages> page document, each page of which I have numbered and signed/initialed, is a true copy of the document produced to me on <date>.

Signature

Name

Qualification (eg JP, Pharmacist, State/Commonwealth Public Servant, Police Officer, Nurse etc)

Registration number (if applicable)