

# DECEASED ESTATES INDEMNITY AND CLAIM FORM WHERE PROBATE IS NOT REQUIRED



Complete this to:

- Claim the Estate funds and/or
- Payment of Funeral expenses

## Details of Deceased Customer

Full legal name \_\_\_\_\_

Date of death \_\_\_\_/\_\_\_\_/\_\_\_\_

Did the deceased leave a will? Yes  (Attach certified copy) No\*

\*Without leaving a Will, the Indemnifier is claiming the credit balance of the Customer's account/s as an entitled person under s 65(2) and s 65(3) Administration Act 1969

## Relationship in order of right to claim (select one):

- Executor/s named in the Will (if applicable)
- Surviving spouse of the Deceased
- All** children of the Deceased
- Parents of the Deceased
- All** siblings of the Deceased

<p>Have you provided the following? Please tick:</p> <p><input type="checkbox"/> Certified copy of the Death certificate</p> <p><input type="checkbox"/> Certified copy of the Will (if applicable)</p> <p><input type="checkbox"/> Certified copy of valid Photo ID (i.e. Drivers licence, Passport) for all Executors/ Claimants/Funeral Director</p> <p><input type="checkbox"/> A copy of the Funeral Invoice (if applicable)</p> <p><input type="checkbox"/> A copy of the receipt in the Claimant's name for reimbursement of Funeral costs (if applicable)</p>
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## Details of All Executors/Claimants and/or Funeral Directors (are required to sign the Claim form)

Full name \_\_\_\_\_ (Executor/Claimant/Funeral Director)

Address \_\_\_\_\_

Telephone number \_\_\_\_\_ Email address/Fax number \_\_\_\_\_

## Details of All Executors/Claimants and/or Funeral Directors (are required to sign the Claim form)

Full name \_\_\_\_\_ (Executor/Claimant/Funeral Director)

Address \_\_\_\_\_

Telephone number \_\_\_\_\_ Email address/Fax number \_\_\_\_\_

## Funeral expenses claim:

I am/we are (select one):

- (Option 1) The person (s) who paid the funeral expenses for the Deceased amounting to \$ \_\_\_\_\_, as shown in the attached copy of the receipt and invoice for the funeral.
- (Option 2) A funeral director, being a creditor of the Deceased's Estate in respect of the unpaid funeral expenses amounting to \$ \_\_\_\_\_, as shown in the attached copy of the invoice for the funeral.

