

Section 1 - Deceased Member and Information

Deceased membership number

Deceased membership name

Important Privacy Information

- By completing this form you are giving us personal information for the purpose of closing a Deceased Account. If you do not provide us with the information, we may not be able to close the account. We may disclose your personal information to other organisations which provide services that assist us in supplying or administering the products and services we offer.
- We may disclose your personal information to overseas recipients in accordance with our Privacy Policy. Our Privacy Policy contains important information about our management of personal information including how you may access and correct your personal information. Our Privacy Policy is available in our branches upon request, by calling us on 13 25 85 and on our website at www.beyondbank.com.au/privacy.html

Information to know

- Accounts may be combined to settle debts, but only if held solely by the deceased member (i.e. not jointly held accounts).
- A fee may apply and will be withdrawn from the funds in the account prior to closure as detailed in our Fees and Charges guide, available on our website.
- Where an international money transfer or draft is required, please contact the Deceased Estates team regarding the information needed and associated costs - deceasedestates@beyondbank.com.au
- All executors **or** all administrators **or** next of kin must sign and complete the form. People in different locations can use separate forms, as long as payment instructions are consistent.

Section 2 - Claimant Details

Select the appropriate option:

- The estate is less than \$35,000 and the deceased left a valid Will and no application has been made and I/we do not intend to apply for a Grant of Probate, and no other person intends to apply for a Grant of Probate.
- I/We are the executor(s) of the estate and are legally entitled to authorise the disbursement of the funds, as instructed on this form.
- I / We have applied for or have been granted Probate / Letters of Administration (disbursement or establishing an "Estate of..." trust will not occur until provided).
- The deceased did not leave a valid Will. I/We are the next of kin of the member (the partner, **or** all children, **or** all parents, in that order) and are legally entitled to authorise the disbursement of funds, as instructed on this form. Due to the value of the estate being less than \$35,000, I/we have not applied, and will not be applying for Letters of Administration.

Continue to Section 3

Section 3 - Disbursement Instructions

Option 1 – EFT

- Please use a percentage value to be paid (eg 100%) and complete the required payment method. Only include specific values when reimbursing or paying specific values to beneficiaries.
- Please print multiple pages for additional disbursements. Note that all pages must be provided together and signed.
- Please ensure all details are correct. Incorrect details for an external transfer may result in money being paid to the wrong account and may result in loss of funds.
- - Please note we will no longer be offering cheques to be issued.

EFT Transfer – Preferred Reference (no more than 18 characters)

1. Account Name / Payable to	BSB	Account Number	% or Amount
<input style="width: 90%;" type="text"/>	<input style="width: 10%; text-align: center;" type="text"/> - <input style="width: 10%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 10%;" type="text"/>
2. Account Name / Payable to	BSB	Account Number	% or Amount
<input style="width: 90%;" type="text"/>	<input style="width: 10%; text-align: center;" type="text"/> - <input style="width: 10%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 10%;" type="text"/>
3. Account Name / Payable to	BSB	Account Number	% or Amount
<input style="width: 90%;" type="text"/>	<input style="width: 10%; text-align: center;" type="text"/> - <input style="width: 10%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 10%;" type="text"/>
4. Account Name / Payable to	BSB	Account Number	% or Amount
<input style="width: 90%;" type="text"/>	<input style="width: 10%; text-align: center;" type="text"/> - <input style="width: 10%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 10%;" type="text"/>
5. Account Name / Payable to	BSB	Account Number	% or Amount
<input style="width: 90%;" type="text"/>	<input style="width: 10%; text-align: center;" type="text"/> - <input style="width: 10%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 10%;" type="text"/>

Option 2 – Convert the membership to an “Estate of..” Informal Trust

- The deceased membership and associated accounts will be converted into an Estate of the late informal trust.
- Probate is required for the “Estate of” when funds are greater than Beyond Bank’s Policy amount of \$35,000.
- Where there is more than one executor, please indicate the signing authority required to transact on the accounts. (eg 1 to sign, 2 to sign) to sign
- Signatory membership required. Complete a Signatory Addition form for each executor.

Term Deposits

Preferred instructions for any Term Deposits that may be associated with the membership.

- Please close all Term Deposits at the time of conversion. Funds and accrued interest will be placed into a savings account. (Fee free when converted on all early redemptions)
- OR
- Please leave all Term Deposits. I/We understand that an “Estate of” will be required and normal fees and charges will apply, should we wish to carry out an early redemption at a later time.

Section 4 - Primary Contact Details

Please nominate a primary contact for correspondence.

Name	Contact Number	Email
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Address		
<input style="width: 95%; height: 20px;" type="text"/>		

Section 5 - Indemnity

1. I/We indemnify and will continue to indemnify Beyond Bank Australia against any liability, cost, claim, action, damage, charge or expense which may arise directly or indirectly because of the instructions provided.
2. I/We understand that Beyond Bank will be required to verify me/us before releasing any funds or financial information.
3. I/We have read and agree to the Privacy Statement.
4. I/We request the closure of all accounts or conversion to an "Estate of..." trust.

Section 6 - Signatures

Note: Two forms of certified identification (eg Driver's Licence, Medicare card or Passport) must be provided for each signature. This also applies to existing members. When not provided in person at one of our branches, the certified ID must be returned with our Certification of Original Documents form.

Full Name

Signature

Full Name

Signature

Full Name

Signature

Full Name

Signature