

Date: \_\_/\_\_/20\_\_



## PROMPT LEGAL SERVICES

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### INFORMATION REQUIRED FOR PROBATE APPLICATIONS

#### Deceased' Details

- Full and correct name of deceased: \_\_\_\_\_
- Did the deceased hold any assets under an alias: \_\_\_\_\_
- Late address \_\_\_\_\_
- Occupation:  Retired \_\_\_\_\_
- Date of Birth: \_\_\_\_\_

#### Executor's Details

- Full name of the applicant: \_\_\_\_\_
- Full address: \_\_\_\_\_
- Occupation: \_\_\_\_\_
- Date of Birth: \_\_\_\_\_
- Relationship to the deceased: \_\_\_\_\_

#### Checklist of required items

- Full Death Certificate (*will take 4-6 weeks from date of death*);
- Will (or the name of the solicitors who hold the original);
- The Executors tax file number (TFN).

#### Assets

- A copy of any bank account statement or passbook;
- A copy of share certificates or dividend statements;
- A copy of a Centerlink correspondence;
- A copy of any Titles;
- A copy of correspondence detailing any accommodation bonds;
- An estimate of household furniture and personal goods;
- Details of any Vehicles the deceased held in their name;
- Does the deceased have any insurance policies?
- Does the deceased have any superannuation?
- Evidence of any other Assets the deceased held in their name.

#### Liabilities

- A copy of any Credit Card statement;
- A copy of any loans;
- Any other liabilities the deceased held.