

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 _____

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.