

Deceased Estate Form – Will



This form can only be completed by an Executor or a Solicitor.

Instructions

- Complete the relevant sections
- Obtain and provide certified copies of the required documents as outlined in each section below.

Once we've received these documents, we'll be in touch to discuss next steps.

For information about the process including how to get documents certified, go to www.ubank.com.au/deceasedestate

01 Personal details of deceased customer

Full name

Date of Birth (DOB)

Date of Death (DOD)

Residential address

State

Postcode

Document required: A **certified** copy of the Death Certificate or Grant of Probate emailed to ubank.bereavement.support@ubank.com.au

02 Personal details of Estate Representative(s) (Executor(s) or Solicitor)

1. Full name

☐ Executor

☐ Solicitor

Residential address

State

Postcode

Postal address (if different from residential)

State

Postcode

Date of Birth (DOB)

Email

Contact number

2. Full name

☐ Executor

☐ Solicitor

Residential address

State

Postcode

Postal address (if different from residential)

State

Postcode

Date of Birth (DOB)

Email

Contact number

3. Full name

☐ Executor ☐ Solicitor

Residential address

State Postcode

Postal address (if different from residential)

State Postcode

Date of Birth (DOB)

Email

Contact number

Of the above, who would you like to be the main contact?

4. Full name

☐ Executor ☐ Solicitor

Residential address

State Postcode

Postal address (if different from residential)

State Postcode

Date of Birth (DOB)

Email

Contact number

Document required: Each Estate Representative, excluding Solicitors, needs to post (to the UBank address below) **original certified** copies of photo ID. Please note, this is only required if the Estate Representative is not an existing UBank or NAB customer.

UBank Bereavement Support
Reply Paid 1466
North Sydney NSW 2059

03 Instructions for accounts held

a. Savings and Transaction account(s) and Term Deposits

This includes Ultra Transaction and USaver Savings accounts, and Term Deposits (excluding SMSF). Complete this section if such accounts are held.

Account Number:

The instruction is to:

- ☐ Change the account ownership from joint to single, or
☐ Close the account

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- ☐ Close the account

**Please note we can only amend joint account details held between you and the deceased when proof of death has been provided. The account numbers will stay the same.*

Document required: A **certified** copy of:

- the Will; or
- Grant of Probate (if applicable), which needs to be emailed to **ubank.bereavement.support@ubank.com.au**

** Probate must be granted from the same state where the accounts are held; if Probate has been granted in another state, we require this document to be resealed in the relevant state.*

b. Home loan(s)

Only complete this section if such accounts are held.

Loan ID 1:

The instruction is that:

- ☐ The surviving borrower continues with the loan, or
- ☐ A new individual is to be added as a borrower to the loan, or
- ☐ The property will be sold and the loan repaid in full, or
- ☐ Not yet decided

Loan ID 2:

The instruction is that:

- ☐ The surviving borrower continues with the loan, or
- ☐ A new individual is to be added as a borrower to the loan, or
- ☐ The property will be sold and the loan repaid in full, or
- ☐ Not yet decided

Loan ID 3:

The instruction is that:

- ☐ The surviving borrower continues with the loan, or
- ☐ A new individual is to be added as a borrower to the loan, or
- ☐ The property will be sold and the loan repaid in full, or
- ☐ Not yet decided

Loan ID 4:

The instruction is that:

- ☐ The surviving borrower continues with the loan, or
- ☐ A new individual is to be added as a borrower to the loan, or
- ☐ The property will be sold and the loan repaid in full, or
- ☐ Not yet decided

Document required: If applicable, we will request a **certified** copy of a Grant of Probate.

c. SMSF account(s)

Only complete this section if such accounts are held.

If the deceased held any SMSF accounts, either solely or jointly, we'll need instructions on how to proceed with these accounts. We can only take instructions, such as updates to the trustees/ directors or account closure requests, from those appointed to the SMSF as a Trustee or Director.

Name of SMSF:

ACN:

Account Number:

The instruction is for:

- ☐ The surviving Director to maintain the account as a Sole Director, or
- ☐ The individual fund to be converted to a Corporate structure, or
- ☐ A new Trustee/Director to be appointed to the Fund**, or
- ☐ The account to be closed, or
- ☐ Not yet decided

***Please note: An individual SMSF requires two Trustees to manage it.*

Document required: Only in the case where a new individual Trustee is to be appointed to the account or when an Individual Trustee changes to a Corporate Trustee, a **certified** copy of a Deed of Amendment needs to be posted to:

UBank Bereavement Support
Reply Paid 1466
North Sydney NSW 2059

04 Bank account details and authority to release funds (to be signed by Executor)

Please provide details of the bank account to which any remaining funds will be paid. Please note: UBank does not issue cheques, you must specify one Australian account (we are unable to process split distributions).

Account Name

Name of financial institution

BSB number

 -

Account number

Important: Please ensure all details are correct. UBank cannot check the account name matches the BSB or account number. An incorrect BSB or account number will result in your money being paid to the wrong account and may result in the loss of your funds.

By signing below, I/we:

- authorise UBank to release the funds held by the deceased to the account detailed above;
- acknowledge all information and payment instructions provided above are accurate.

**Signatures must be handwritten.*

Name

Signature

Date

Name

Signature

Date

Name

Signature

Date

Name

Signature

Date

All information is collected and handled in accordance with our **Privacy Policy**.

1. The Applicant ('you') acknowledge and agree that:

- (i) You are solely responsible for ensuring that your instructions on this Application are correct;
- (ii) NAB ('we') is under no obligation to verify the correctness of your instructions. Without limitation to the foregoing, we are entitled to pay to the credit account identified by you as the beneficiary's without enquiry and are under no obligation to use any other information you give us (including the name and address of the beneficiary) to confirm the beneficiary's ownership of that account, and
- (iii) Once executed by NAB, the payments made under this Request Form are irrevocable.

2. Please note that the beneficiary name does not form part of your payment instructions, and it will not be checked by NAB to verify that it matches the beneficiary's BSB and account number. NAB will process the payment using the BSB and account number you provide. Please ensure that the BSB and beneficiary account number are correct, because an incorrect BSB and account number will result in your money being paid to the wrong account and the loss of funds.

3. We will not be liable for and exclude all liability for loss or damage (including any indirect or consequential loss or damage) arising out of or in relation to:

- (i) delays, errors, or omission in transmission or payment beyond our control; or
- (ii) acts of default or omission of any kind by you or any third party outside our control.

4. If we are negligent or in a breach of duty to you, we will supply the services described in these terms and conditions again.

5. Subject to applicable law, you indemnify and continue to hold us indemnified against any liability, loss, damage or expense in respect of your provision of incorrect instructions.

Complaints

NAB has available on request information about the procedures for lodging a complaint. For more detail visit:

<https://www.nab.com.au/contact-us/feedback>

If you subsequently feel that the issue has not been resolved to your satisfaction, you may contact our external dispute resolution scheme. External dispute resolution is a free service established to provide you with an independent mechanism to resolve specific complaints. Our external dispute resolution provider is the Australian Financial Complaints Authority (AFCA) scheme and can be contacted at:

Telephone: 1800 931 678 (free call)

Email address: info@afca.org.au

Website: www.afca.org.au

Postal address: Australian Financial Complaints Authority
GPO Box 3, Melbourne VIC 3001