

The Public Trustee

Estate Administration Appointment Checklist



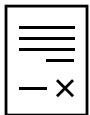
After a person you know has died you will need to give information to the Public Trustee. This information will help the Public Trustee to finalise the person's affairs.



This means:

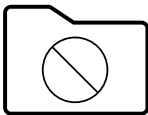
- Pay off any **debts**.

Debts are things the person owes money to.



- Follow the person's Will.

- Sort out who gets the person's belongings.



- Cancel or end any accounts.

- Finalise the person's **tax**.

Tax is money owed to the government.



This list will help you to know what to give to the Public Trustee.



You may see the word **deceased**.

This means the person who died.



It is ok if you cannot find everything. Bring what you can.



Beneficiaries

People who get the deceased person's belongings such as shares in the person's home.

This could be family members or close friends.

Family

Details about immediate family members.

Family could be mum, dad, sister, brother, son, daughter.

Beneficiaries

Details about people named in the Will.

- Full name.
- Home address.
- Email address.
- Phone number.
- Date of birth.

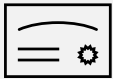


Funerals

Ceremony or services.

Funeral arrangements such as:

- Account.
- Plan.
- Insurance.
- Prepaid funeral documentation.



Certificates

Death certificate

Original copy is needed.

Other certificates:

- Birth certificate.
- Marriage certificate.
- Change of name certificate.
- Divorce papers.



Assets and Liabilities

Assets are things the deceased person owned or put their money towards.



Liabilities are people and organisations that the deceased person owes money to.

Real Estate

Certificate of Title/title reference.

This says the deceased owned their home.

Vehicle

This could be car, truck, motorbike.

- Registration papers.
- Insurance details.

Shares and investments

- Businesses and companies the deceased put their money into.

- Security Reference Numbers.

This can be found on letters from the company.

Bank accounts and term deposits

- Bank passbook.
- Cheque books and statements.
- Term deposit details.
- Credit card or key cards.

Superannuation

- Name of fund.
- Member number.

Insurance

- Life insurance policy.

Business

- Details of any business the deceased person owned or co-owned.



Tax

Capital Gains Tax Records

- Copy of last income Tax Return and last assessment notice.
- Tax File Number.
- Any information for tax purposes for the current financial year.



Accounts

Things the deceased might have an account or membership with.

Utilities bills

- Telephone.
- Gas and electricity.
- Water rates.
- Land tax.
- Council rates.
- Building and contents insurance.

Liabilities

Any other accounts the deceased may owe money to.

Online and digital assets

Things the deceased may have that is online only.

- Online betting accounts.



Cards

- Drivers licence.
- Seniors card.
- Pension card and Entitlement card.
- SA Ambulance.
- Medicare Card.
- Private Health Fund.
- Store Account Cards (e.g. Myer, David Jones)

Contact the Public Trustee



Please contact the Public Trustee if you have any questions or to make an appointment.



08 8226 9931



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Adelaide



Please check with Public Trustee before sending any documents by registered mail.

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