

# Deceased Estate Checklist



Bankwest, a division of Commonwealth Bank of Australia  
ABN 48 123 123 124 AFSL/Australian credit licence 234945

Please use this checklist as a guide to help you provide us with the information required to finalise the accounts and services of the person who has passed away.

## Section 1 – Documents/items to provide

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| <ul style="list-style-type: none"><li><input type="checkbox"/> Deceased Customer Notification form</li><li><input type="checkbox"/> Evidence of Death<ul style="list-style-type: none"><li>› Death Certificate</li><li>› Probate</li><li>› Letters of Administration</li><li>› Funeral Account/Invoice</li></ul></li><li><input type="checkbox"/> Other legal documents (if available)<ul style="list-style-type: none"><li>› Will</li><li>› Solicitor's documents</li></ul></li></ul> | <ul style="list-style-type: none"><li><input type="checkbox"/> Bankwest issued items<br/>Passbooks in the sole name of the deceased can no longer be used. Please mark them cancelled and retain for record purposes.<br/><br/>If the deceased had any of the following bank items, they can no longer be used. Please return them to any Bankwest store, or mail them to us.<ul style="list-style-type: none"><li>› Credit cards</li><li>› Keycards</li><li>› Unused personal cheques (in the sole name of the deceased)</li><li>› Unused traveller's cheques issued in the name of the deceased. We will organise a reimbursement.</li></ul></li></ul> |
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## Section 2 – Other organisations to contact

Banks are not the only organisations you need to contact when a person has passed away. To help you, we have provided a list of common services you may need to contact at this time:

### Bills

- Gas
- Electricity
- Telephone
- Mobile phone
- Internet
- Council rates
- Water rates
- Nursing home fees
- Medical expenses
- Australian Taxation Office

### Insurance policies

- Funeral policy
- Life insurance
- Home/Contents insurance
- Credit card insurance
- Personal loan insurance
- Income protection insurance
- Motor vehicle insurance
- Business insurance