

Deceased Estate Checklist

bankwest



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

Deceased Customer Notification form

Evidence of Death

- Death Certificate
- Probate
- Letters of Administration
- Funeral Account/Invoice

Other legal documents (if available)

- Will
- Solicitor's documents

Bankwest issued items

Passbooks in the sole name of the deceased can no longer be used. Please mark them cancelled and retain for record purposes.

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.

- Credit cards
- Keycards
- Unused personal cheques (in the sole name of the deceased)
- Unused traveller's cheques issued in the name of the deceased. We will organise a reimbursement.

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