



SOUTHERN WATERS

legal

Deceased Estate Matters Checklist- Initial Appointment

We ask that you bring the following documents or information (if applicable) to your initial appointment:

- Death Certificate
- Deceased Will/s and any Codicil
- Funeral Account
- Photographic identification for yourself
- Photographic identification for the deceased
- List of all assets and liabilities of the deceased, including:
- Title deed/Certificate of Title to any property (and copy of current rates, house insurance policy and mortgage details)
- Recent superannuation fund statement (and any death benefit nomination)
- Life insurance policy (including recent annual statement)
- Trust deeds of any trust (including family trust and self-managed superannuation trust funds)
- Details of business (including company details or partnership agreement)
- Last bank statement (including savings accounts, term deposits, credit cards, personal loans etc)
- Details of any shares, bonds, debentures etc
- Last income tax return and tax assessment (including any ATO liabilities)
- Employment details and group certificate
- Motor vehicle details
- Medicare / pension details
- Hospital / medical liabilities
- Details of any other asset or liability

If you are unable to locate any of the information or documents above, please do not worry as we may be able to assist you locate or obtain these for you.