



deceased customer notification.

Mail: ME Deceased Estate Administration, PO Box 1345, Melbourne, VIC 3001.
Any questions? Call ME on **1300 406 372** Mon to Fri 9am-4pm (AEST/AEDT)
or visit mebank.com.au

how to use this form.

- Please complete this form to let us know that one of our customers has passed away.
- Please return the form along with certified copies of supporting documents (if available).

Important - the form should be completed by the customer's closest next of kin or the executor.

section 1 - deceased customer details.

Title (Mr/Mrs/Miss/Ms/Other) Given name(s) Family name

Residential address (we can't accept a PO Box address)

Date of birth Date of death ME account number (if known)

Marital status married widowed never married defacto separated divorced

Length of time that the deceased was separated, divorced, or in a de facto relationship (if applicable)

section 2 - evidence of death. (please tick the appropriate box)

- I've attached a certified copy of the full death certificate.
- I've attached other evidence (e.g. a certified copy of the medical certificate or coroner's report, or a copy of the funeral invoice).
Please send a certified copy of the full death certificate when it becomes available.

section 3 - will. (please tick the appropriate box)

- Do you intend to apply for Probate or Letters of Administration? ►
- Yes No
- I've attached a certified copy of the Will.
- I'll send a certified copy of the Will when available.
- There is no Will.

Probate is granted by the Supreme Court to confirm the last Will of a deceased person is valid and gives the appointed executor the authority to act on behalf of the estate. All estates valued at more than \$25,000 require probate.

Letters of Administration are granted by the Supreme Court to appoint an administrator of the estate. They are required when the deceased has not left a Will and the estate is valued at more than \$25,000.

section 4 - your details.

Title (Mr/Mrs/Miss/Ms/Other) Given name(s) Family name

Residential address (we can't accept a PO Box address)

Home phone Work phone Mobile phone

Relationship to the deceased Are you already a ME customer?
 Yes ► Account number

Are you the:
 Next of kin Executor Administrator No ► Complete the attached ID form

section 5 – solicitor details. (if there is a solicitor or lawyer dealing with the estate)

Title (Mr/Mrs/Miss/Ms/Other)	Given name(s)	Family name	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Business name			
<input type="text"/>			
Address			
<input type="text"/>			
		State	Postcode
Contact number		Email address	
(<input type="text"/> <input type="text"/>) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		<input type="text"/>	

section 6 – your signature. (to be signed by the person completing this form)

Print name	Signature	Date
<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>



identity verification (deceased estates).

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how to use this form.

Step 1 complete either **option a** or **option b**.

Step 2 please have your document(s) certified by one of the persons listed on page 2 of this form.

Step 3 mail the completed form along with **certified copies** of identification document(s) to ME.

option a. (supply one primary photographic identification document)

Primary photographic identification document:

- Driving licence or permit (Australian only)
- Passport or similar document issued for international travel (Australian or foreign*)
- Proof of age card (Australian only)

All documents **must** be current (with the exception of Australian passports expired within the last two years but not cancelled) and contain the applicant's full name, date of birth **OR** current residential address.

*Foreign documents **must** be in English.

option b. (supply one primary non-photographic identification & one secondary identification document)

Primary non-photographic identification document:

- Birth certificate (Australian only)
- Birth extract (Australian only)
- Citizenship certificate (Australian only)
- Pension card issued by Centrelink

Secondary identification document (Australian only):

- Government financial benefits notice (issued within the last 12 months)
- Australian Tax Office notice of assessment (issued within the last 12 months)
- Local government or utilities bill (issued within the last three months)

Important - please remember to have your document(s) certified by one of the persons listed on page 2 of this form.

your details.

Title (Mr/Mrs/Miss/Ms/Other) Given name(s) Family name

Residential address (we can't accept a PO Box address)

State Postcode

Date of birth Mother's maiden name Password (5-9 characters)

Occupation

Are you an Australian citizen? No ▼ Yes ► Go to 'your signature'

Complete the information below if you are not an Australian citizen:

Are you a permanent resident? No ▼ Yes ▼

Current passport number Country of issue Visa subclass details

your signature.

Signature Date

Note - it is an offence under the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (Cth) to provide false or misleading information or to produce false or misleading documents.

Privacy - the information provided by you on this form to verify your identity is collected in accordance with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (Cth). Information may be disclosed to the Australian Transaction Reports and Analysis Centre (AUSTRAC) or as other legislation allows or requires.

the following persons can certify a document as a true copy of an original.

- Medical practitioner
- Notary public
- Minister of religion
- Trade marks attorney
- Bailiff
- Police officer
- Justice of the Peace
- Legal practitioner
- Sheriff or Sheriff's officer
- ME bank officer*
- Registrar or Deputy Registrar of a court
- Judge, Master or Clerk of a court
- Australian consular or diplomatic officer
- CEO of a Commonwealth court
- Commissioner for Affidavits or Declarations
- Member of:
 - CPA Australia
 - the National Institute of Accountants
 - the Institute of Chartered Accountants in Australia
 - the Association of Taxation and Management Accountants
 - Engineers Australia (other than the grade of student)
 - Chartered Secretaries Australia
 - the Australasian Institute of Mining and Metallurgy
- Employee of the Commonwealth or Australian Trade Commission in a country or place outside Australia
- Senior Executive Services employee*, permanent employee*, or parliament member of the Commonwealth, the Parliament of a State Territory legislature or local government authority of a State or Territory
- Officer or authorised representative of a holder of an Australian financial services licence*
- Australian Defence Force officer, non-commissioned officer* or warrant officer
- Australia Postal Corporation agent in charge of a postal office, or permanent employee in a post office**
- Full-time teacher at a school or tertiary education institution, school principal or dean

*with two or more years of continuous service
 **with five or more years of continuous service

ME use only

Verifying officer to complete sections 1 and 2.

section 1 – record of identification document(s) received.

ID record	Document 1	Document 2 (if applicable)
Full name verified	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Date of birth verified	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Residential address verified	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Verified from	<input type="checkbox"/> Original <input type="checkbox"/> Certified copy	<input type="checkbox"/> Original <input type="checkbox"/> Certified copy
Copy of ID document	<input type="checkbox"/> Attached <input type="checkbox"/> Not attached (go to Section 2) (complete details below)	<input type="checkbox"/> Attached <input type="checkbox"/> Not attached (go to Section 2) (complete details below)
Type of document (e.g. passport)	<input type="text"/>	<input type="text"/>
Document number (if applicable)	<input type="text"/>	<input type="text"/>
Date of issue (if applicable)	<input type="text" value="DDMMYYYY"/>	<input type="text" value="DDMMYYYY"/>
Place of issue (if applicable)	<input type="text"/>	<input type="text"/>
Expiry date (if applicable)	<input type="text" value="DDMMYYYY"/>	<input type="text" value="DDMMYYYY"/>

section 2 – verifying officer details.

I confirm that I have sighted original or certified documentation and have verified the individual's full name and either date of birth or current residential address.

Name of verifying officer

Signature

Date