

Document Library - Deceased Estates

Deceased Estate Checklist for Australian Residents

This checklist has been prepared to assist executors and administrators when dealing with the securities of an individual deceased securityholder where the deceased was an Australian resident.

This is a checklist form titled "Deceased Estates Checklist for Australian Residents". It is designed to help executors and administrators manage the securities of a deceased Australian resident. The form is divided into several sections: "Section 1 - General Requirements", "Section 2 - Requirements when the deceased DID NOT have a valid Will", and "Section 3 - Requirements when the deceased DID have a valid Will". Each section contains a list of tasks with checkboxes and instructions. At the bottom, there are instructions to "COMPLETE FORMS AS APPLICABLE AND THEN GO TO SECTION 2" and a "Please see next page" link.

Standard Transfer

This form is used to transfer securities from a deceased estate holding to a beneficiary(s) and/or buyer(s).

This is a form titled "Standard Transfer - Transfer Securities to Beneficiary(s)/Buyer(s)". It is used to transfer securities from a deceased estate holding to a beneficiary or buyer. The form includes a "Return your form" section with checkboxes for "By post" and "By email". It also has a "For all enquiries" section with contact information for Computershare. The main body of the form contains instructions and a checklist of requirements for the transfer. At the bottom, there is a "Privacy statement" and a "Turn over to complete the form" link.

Transmission Application

This form is used to transmit the securities into the name(s) of the executor(s)/administrator(s) of the estate for later distribution to the beneficiary(s) and/or buyer(s).

This is a form titled "Transmission Application - Transmit Securities to Executor(s)/Administrator(s)". It is used to transmit securities into the name of the executor or administrator of the estate. The form includes a "Return your form" section with checkboxes for "By post" and "By email". It also has a "For all enquiries" section with contact information for Computershare. The main body of the form contains instructions and a checklist of requirements for the transmission. At the bottom, there is a "Privacy statement" and a "Turn over to complete the form" link.

Request to Register Surviving Securityholder(s)

This form is used to pass all securities of a joint holding to the surviving securityholder(s) as legal owner(s) of the securities.

This is a form titled "Request to Register Surviving Securityholder(s)". It is used to pass all securities of a joint holding to the surviving securityholder(s) as legal owner(s). The form includes a "Return your form" section with checkboxes for "By post" and "By email". It also has a "For all enquiries" section with contact information for Computershare. The main body of the form contains instructions and a checklist of requirements for the registration. At the bottom, there is a "Privacy statement" and a "Turn over to complete the form" link.

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Confirmation of Deceased's Name

This form is used where the name of the deceased securityholder on the register does not fully correspond to that shown on the legal documentation (Eg. Death Certificate, Probate, Letters of Administration and/or Will).

This is a thumbnail of the 'Confirmation of Deceased's Name' form. It includes a header with the Computershare logo and contact information. The form is divided into several sections: 'Confirmation of the Deceased's Name', 'Step 1: Details of the securityholding', 'Step 2: Details of existing Securityholdings, ASIC(s) or ASIC(s)2(s)', 'Step 3: Details of the deceased', 'Step 4: Signing Instructions', and 'How to verify a document'. It also contains a 'Privacy statement' at the bottom.

Intestacy and Indemnity Request Form

This indemnity form may be used in lieu of our requirement for Letters of Administration, where the deceased securityholder did not leave a valid Will. Please refer to the Deceased Estate Checklist for terms of use.

This is a thumbnail of the 'Intestacy and Indemnity' form. It includes a header with the Computershare logo and contact information. The form is divided into several sections: 'Intestacy Request and Indemnity', 'Step 1: Details of the securityholding', 'Step 2: Details of the applicant (next of kin)', 'Step 3: Signing Instructions', 'Step 4: Returning your form', and 'Privacy Notice'. It also contains a 'Privacy statement' at the bottom.

Request for Information Fee Schedule

This form is used to request specific information such as historical payment and/or transaction information for a deceased estate holding.

This is a thumbnail of the 'Request for Information Fee Schedule' form. It includes a header with the Computershare logo and contact information. The form is divided into several sections: 'Request for Information Fee Schedule - Deceased Estate Holding', 'Step 1: Payment Details', 'Step 2: Details of the securityholding', 'Step 3: Signing Instructions', and 'Step 4: Returning your form'. It also contains a 'Privacy statement' at the bottom.

Section 1071B Statement

This statement is required where Australian Probate/Australian Letters of Administration or reseal of Foreign Probate/Foreign Letters of Administration has/have been granted in an Australian State different to where the securities are registered.

This is a thumbnail of the 'Section 1071B Statement' form. It includes a header with the Computershare logo and contact information. The form is divided into several sections: 'Section 1071B Statement', 'Step 1: Details of the securityholding', 'Step 2: Details of the executor(s) or administrator(s)', 'Step 3: Signing Instructions', 'Step 4: Returning your form', and 'Privacy statement'. It also contains a 'Privacy statement' at the bottom.

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Small Estates Indemnity

This indemnity form may be used in lieu of our requirement for Australian Probate or reseal of Foreign Probate, where permitted under Australian law. Please refer to the Deceased Estate Checklist for terms of use.



Certification Guidelines FAQ

This FAQ has been prepared to assist in understanding how to certify legal and other supporting documents.



For any queries or concerns relating to these documents, please contact us on:

Within Australia: 1300 850 505
Outside Australia: +61 3 9415 4000