

We're sorry.

In what's always a difficult time, we've tried to make our paperwork as easy as possible for you.

This form

- Allows you, the executor, to give us the authority to finalise the Deceased's estate, close their accounts, and hand over the funds to the claimants
- Must be signed by each of the estate's executors
- Needs to be accompanied by **certified copies** of the following supporting documents:
 - Full Death Certificate
 - Will
 - Grant of Probate with the Will Annexed (where applicable)
 - Each executor's photo ID (such as a driver's licence or passport) if they're not a NAB customer.

We're here to help.

If you have any trouble completing it, just call us on 1300 911 451. We're here between 8am – 5pm (Australian Eastern Standard Time) weekdays, and we're always happy to help.

Section 1 Deceased customer details

Deceased's Name

Date of Death

NAB Deceased Reference No.

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Section 2 Acknowledgements and declarations (So we know you are acting within your powers)

I/we (the Executors) of the estate declare that to the best of my/our knowledge:

2.1 Select one of the following:

-
- The Deceased left a valid Will
 - No application has been made and we do not intend to apply for a Grant of Probate
 - No other person intends to apply for a Grant of Probate
-
- The Deceased left a valid Will
 - I/we have obtained a Grant of Probate with the Will Annexed

2.2 The financial assets and liabilities of the Deceased's estate with NAB are:

Account Number	Account Type	Account Balance
<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"/>	<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"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>

2.3 I/we are entitled to the funds held in the Deceased's accounts because I am/we are the **executor(s)** named in the last and valid Will of the Deceased or are the Executors granted Probate with the Will Annexed.

2.4 In consideration of NAB paying the net proceeds of the Deceased accounts to me, I/we:

- Will undertake all just debts and other expenses of the Deceased's estate before distributing the payment received by me/us from NAB
- Understand I'll/we'll be required to verify who I/we am/are before NAB releases any surplus funds
- and my/our successors and assigns, jointly and severally, indemnify NAB, on demand, against all liabilities, losses, damages, claims, demands, proceedings, judgements, charges, costs and expenses which may at any time be incurred by NAB or brought against NAB by any person on account of or in respect of this payment to me/us.

Section 3 Your identification (This is a Government Requirement)

We'll need proof you're who you say you are. We're sorry we have to be so suspicious, but it's the only way we can keep the deceased's account safe. So each Executor needs to provide us with either of the following:

Option 1:

One of your existing NAB account numbers

Option 2:

A certified copy of your photo ID (such as your driver's licence or passport)

Section 4 Closing the accounts and distribution of funds

A. Closure

As executor of the estate, I authorise and request closure of **all** accounts. By signing below, I authorise NAB to combine accounts and clear any debts held solely by the Deceased in relation to personal loans, credit cards, overdrawn transaction accounts and the like.

B. Distribution of funds – How do you want the payments to be made?

By electronic funds transfer into the following NAB account (quickest option)

Name

BSB number

Account number

<input type="text"/>	<input type="text"/>
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By electronic funds transfer into the following account (allow up to 2 business days from when the accounts are closed):

Name

BSB number

Account number

<input type="text"/>	<input type="text"/>
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Receiving bank name

Warning: Please ensure all details are correct. NAB cannot check the account name matches the BSB or account number. An incorrect BSB or account number will result in your money being paid to the wrong account and may result in the loss of your funds.

Bank Cheque made payable to (allow up to 5 business days from when the accounts are closed):

Cheque Payable to

If funds are required in a foreign currency, please nominate the currency and an international cheque will be provided. We will apply the NAB rate that applies. Fees may also apply.

Section 5 Signatures

Executor #1

Signature

Date

Full Name (Print)

Address

State

Postcode

Executor #2

Signature

Date

Full Name (Print)

Address

State

Postcode

Executor #3

Signature

Date

Full Name (Print)

Address

Executor #4

Signature

Date

Full Name (Print)

Address