

This form is to be used to outline the payment instructions from a deceased member's account to reimburse or make payments in relation to funeral or Estate expenses, and/or disburse funds and settle the Estate. It must be completed and signed by all appointed Executor(s)/administrator(s) or next of kin of the Deceased Estate.

We're here to help, if you need assistance completing this form or have any questions, call us on 1300 384 400, drop into your local Service Centre or refer to our **Deceased Estate Guide** on our website.


As part of helping you with Estate expenses, we may allow certain one-off payments up to \$15,000 and some ongoing costs to be withdrawn from accounts that are essential for the maintenance of the Estate. These may include:

- Funeral and memorial costs
- Rate or strata payments (if the property is solely in the deceased's name)
- Service provider costs for a property that's solely in the deceased's name, such as:
 - Water rates
 - Electricity/gas bills
- Service provider final payments for the deceased, such as:
 - Internet service
 - Landline phone or mobile phone
- Loan repayments for loans held with us that are solely in the name of the deceased
- Application fee to the court for Probate

To request payment of a cost associated with the Estate you will need:


- To complete this form signed by all the next of kin if there is no Will or by the Executor if there is a Will
- A copy of the invoice that is to be paid

Please forward them to us:



Mail

PO Box A253, Sydney South NSW 1235



Email

deceasedestates@gcmutual.bank



In person

By visiting a Service Centre

Deceased member details

Member number (if known)	Title	Surname	First name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Details of the person requesting payment from account

Surname	First name	Work/Home phone
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email address	Relationship to deceased	
<input type="text"/>	<input type="text"/>	

Funeral and Estate expense payment or reimbursement (if applicable)

I/We authorise payment of Estate expenses or reimbursement to the following account(s):

	Account name	BSB number	Account number	Amount (\$)
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

If required, provide any additional or alternate payment instructions, including: International Money Transfer Transfer details, requests for Bank Cheque(s), or any additional funeral or Estate expense payment or reimbursement details:

Note: If you are seeking reimbursement for an invoice that has already been paid, a tax invoice/receipt from the supplier must evidence that the bill has been paid and by whom. A bank cheque will be drawn in their name.

Bank cheque details (for reimbursement only - please note bank cheque fees apply)

Mailing Address (Unit no./ Street no./ Street name)	Suburb/Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Estate settlement and account closure

I/We authorise combining of account balances (including outstanding credit card, personal loan and overdrawn account balances), closure of the accounts held on behalf of the Estate, and to disburse funds to the following accounts:

	Account name	BSB number	Account number	Payment split (%)*
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Should add up to 100%*

If required, provide any additional or alternate payment instructions, including: International Money Transfer details, requests for Bank Cheque(s), or specific payment to be made prior to the split and disbursement of remaining funds:

Release of assets

To request for the release of assets, please completed our **Request to Release Security Form**.

Authority to release funds & indemnity

All listed Estate representatives must authorise these instructions.

- I/We acknowledge that if funds are withdrawn from the specified account that this may affect any interest payable on the account (if interest or bonus interest is applicable).
- I/We understand that if a Term Deposit needs to be broken to pay the requested amount any remaining money will be reinvested in a Term Deposit for the same period and same interest payment frequency at the current interest rate.
- I/We acknowledge receipt/or request payment of the deceased's money.
- I/We undertake to reimburse the bank for this money and any other costs if it is subsequently proved that I/we are not entitled to it.
- I/We indemnify the bank against any actions or claims which may be made by any person for this money.
- I/We acknowledge the bank may also transfer money kept in the deceased's deposit account to clear debts owed in other accounts (in accordance with the accounts' terms and conditions).

Executor/Administrator/Next of Kin 1

Full name

Signature

Address (Unit no./ Street no./ Street name)

Suburb/Town

State

Postcode

Date

Executor or Next of Kin

If Next of Kin, relationship:

Executor/Administrator/Next of Kin 2

Full name

Signature

Address (Unit no./ Street no./ Street name)

Suburb/Town

State

Postcode

Date

Executor or Next of Kin

If Next of Kin, relationship:

Executor/Administrator/Next of Kin 3

Full name

Signature

Address (Unit no./ Street no./ Street name)

Suburb/Town

State

Postcode

Date

Executor or Next of Kin

If Next of Kin, relationship:

Executor/Administrator/Next of Kin 4

Full name

Signature

Address (Unit no./ Street no./ Street name)

Suburb/Town

State

Postcode

Date

Executor or Next of Kin

If Next of Kin, relationship:

Next steps

Once you have completed this form please return to G&C Mutual Bank by:



Mail

PO Box A253, Sydney South NSW 1235



Email

deceasedestates@gcmutual.bank



In person

By visiting a Service Centre