



Deceased Estate Declaration and Claim/Indemnity Form (value not exceeding \$5,000)

This form applies when Probate/Letters of Administration are not being applied for. It may be used for claims up to but not exceeding the value of \$5,000.

A. Deceased's details

Fields marked with an * must be completed.

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify) _____ Date of death DD / MM / YYYY

Deceased's full legal name* FIRST MIDDLE LAST

B. Declaration and indemnity

Fields marked with an * must be completed.

I Full legal name* FIRST MIDDLE LAST

of Residential address* NUMBER & STREET

SUBURB TOWN/CITY POSTCODE

Occupation (e.g. Bricklayer, Teacher, Unemployed, Retired etc)*

Email

Phone

Solemnly and sincerely declare that:

- I am acting as the Administrator or Executor of the above-named estate. I am either named as the Executor of the will or confirm that the deceased died without a will.
- All information provided is true and correct and forms part of this declaration.
- To the best of my knowledge Probate or Letters of Administration have not been applied for or obtained in New Zealand and I do not intend to, nor will I apply for grant of Probate or Letters of Administration of the Estate of the said deceased and to the best of my knowledge no other person intends to apply for Probate or Letters of Administration of the Estate of the deceased.
- I will pay and discharge any debts that may be proved in the estate of the deceased.
- I shall apply the said moneys in due course of administration as the law requires. In consideration of Westpac New Zealand Limited (Westpac NZ) releasing the funds in the deceased's account(s) I hereby agree to indemnify Westpac NZ against any claims, losses, damages, costs and/or expenses whatsoever (including its own legal costs on a solicitor/client basis,) which may arise in connection with the said account(s) or the payment of the balance(s) therefore and also against all amounts Westpac NZ maybe called upon to pay and all costs (including its own legal costs on a solicitor/client basis) charges and expenses which Westpac NZ may incur in connection therewith.
- I claim payment of the moneys to which the deceased was entitled, upon the grounds of my relationship to the deceased. My relationship to the deceased is one of the below:
 - Husband or wife of the deceased
 - De facto partner of the deceased
 - A child of the deceased
 - Person entitled to the estate under the will of the deceased
 - Person appearing to be entitled to obtain administration of the estate of the deceased in New Zealand
 - Person who has custody and control of the infant children of the deceased
 - Brother or sister of the deceased
 - Parent or legal guardian of the deceased.

I request Westpac NZ to close the accounts of the deceased and pay the funds to the account details below:

Name of account*

Account details*

Bank		Branch		Account number								Suffix					

I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.

Signature* Date* DD / MM / YYYY

Declared at (Place for example, town or city)*

IMPORTANT: Any changes made to this form must be initialled by the declarant.

Document checklist

Please check that you've provided us with all of the following:

- The **completed and signed Deceased Estate Declaration and Claim/Indemnity Form**.
- **Documentation checklist to accompany this form:**
 - Original sighted at a local Westpac branch or certified copy¹ of the Death Certificate or Medical Cause of Death Certificate or other² valid formal proof of death documents
 - Originals sighted at a local Westpac branch or certified copy¹ of valid photo ID³ for the Declarant.
 - Originals sighted at a local Westpac branch or certified copy¹ of proof of address⁴ for the Declarant.

¹ **Certified copy requirements**

- If you're bringing in copies of any documents, you'll need to get them certified by a Trusted Referee beforehand.
- Any documents in another language will need to be translated to English by an approved provider. To view the list of approved translation service provider, refer to **approved translation service providers sheet** at **westpac.co.nz**
- The certified documents must be securely emailed or posted to Westpac New Zealand within 90 days of being certified.
- Certification wording examples:** "I certify that this is a true and correct copy of the original and represents the true likeness and identity of [x] as sighted by me on [date]. I confirm that I am not a not a close relative of either the deceased or the estate executor or administrator and have no involvement in the transaction of business requiring this certification". [signature] [Full name of trusted referee] [Position/authority to sign, registered body, and registered number (or staff number)].

² **Accepted valid formal proof of death documents** – one of the following:

- Death Certificate
- Registered MyTrove notification via **mytrove.co.nz**
- Medical Cause of Death Certificate
- Coroner's Certificate
- A letter from a solicitor or Trust Company administering the estate.

³ **Valid forms of photo ID** – one of the following (**must be current and must contain your signature**):

- New Zealand driver licence (must be able to be verified electronically by Westpac)
- New Zealand passport (must be signed)
- Foreign passport (must be signed)
- New Zealand firearms licence
- New Zealand refugee travel document
- New Zealand emergency travel document
- Bring in your birth certificate with your KiwiAccess or SuperGold card.

⁴ **Proof of address documents** – please provide us with one of the below acceptable forms of address. The document must be dated within the last 12 months and show your name and current residential address.

- Utility bill
- Statement of correspondence from another financial institution (not from Westpac Group)
- Insurance policy document (not from Westpac Group)
- Unexpired rental or tenancy agreement.

Send this completed declaration form and supporting documents to **estate.management@westpac.co.nz** or visit your local branch.

We're here to help.

If you have any questions, please call **0800 756 872 (or +64 9 375 9926 from overseas)** weekdays 8am - 5pm or email **estate.management@westpac.co.nz**