

# Deceased estate document checklist

What to give Queensland Public Trustee  
when we manage a deceased estate.

Easy Read version



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# Help with this guide



You can get someone to help you:

- understand this guide
- find more information.



Contact information is at  
the end of this guide.



Some words in this guide are **blue**.

We write what the blue words mean.

# About this guide



This guide is from the Queensland Public Trustee.



It explains what information to give us when we are managing a deceased **estate**.

An estate is all the things that belong to the person who has died.



You may see the word **deceased**.

Deceased means the person who died.

# What Queensland Public Trustee does to manage an estate



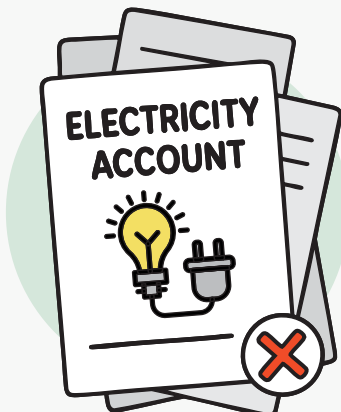
We make a list of all things in the **Will**.

A Will is a person's instructions for their belongings after death.



We pay off any **liabilities**.

Liabilities are things the deceased owes money to.



We cancel or end any **accounts**.

Accounts are bills like phone, insurance or electricity.



We pay **tax**.

Tax is money owed to the government.



We sort out who gets the deceased persons **belongings**.

Belongings can include a house, car, money, furniture or jewellery.

# What to give Queensland Public Trustee

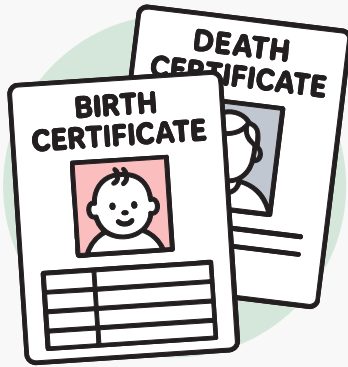


To help manage the estate, we need some information about the deceased person.



It is OK if you cannot find everything.  
Only give us what you can.

# Certificates



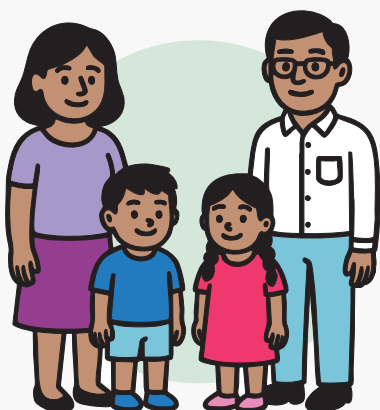
Provide the following certificates, if you have them:

- ☐ Original death certificate of the person
- ☐ Birth certificate
- ☐ Marriage certificate
- ☐ Change of name certificate
- ☐ Divorce papers.

# Beneficiaries



If you are left something in a Will, you are a **beneficiary**.



Tell us about the people named in the Will

If there is no Will, tell us about the person's **family**.

Family could be mum, dad, sister, brother, son, daughter.

## For each beneficiary, give us their details.



- ☐ Full name
- ☐ Date of birth
- ☐ Home address
- ☐ Email
- ☐ Phone number.

# Assets



Assets are the deceased person's belongings



Provide details about **bank accounts and term deposits** the deceased person had.

- ☐ Bank statement
- ☐ Term deposit statement.



Provide details about **shares and investments**. These are companies the deceased person put money into.

- ☐ Security Reference Number or Holder Identification Number
- ☐ Share certificates
- ☐ Dividend and investment statements
- ☐ Details of a broker or financial advisor.



Provide keys and documents for any **real estate**. This is any property the deceased person owned.

- ☐ House keys
- ☐ Council rates notice
- ☐ Insurance papers
- ☐ Details of any property they rented out.



Provide papers on any **vehicles** owned.  
This could be a car, truck, motorbike, boat or caravan.

- ☐ Registration papers
- ☐ Insurance papers.



Provide a list of any other assets. These are any other things the deceased person owned.

☐ A list of things like furniture and jewellery.



Provide details about any business the deceased person owned or co-owned.

☐ Name of accountant or solicitor.

# Liabilities

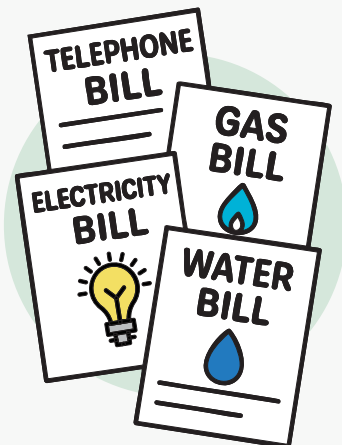


Liabilities are things the deceased owes money to.



Provide documents for the cost of the **funeral arrangements** for the person who died.

- ☐ Funeral account or receipt
- ☐ Pre-paid funeral documents.



Provide the last bill the deceased had an **account** or **membership** with.

- ☐ Telephone bill
- ☐ Gas and electricity bill
- ☐ Water rates bill
- ☐ Council rates bill
- ☐ Insurance papers
- ☐ Any other people or businesses the person owes money to.

# Financial Attorney or Administrator



Provide details on any person who managed the deceased person's money before they died.

☐

Power of Attorney document

☐

QCAT or court order.

# Income



Provide documents about any **income** the deceased person received.

- ☐ Payslips
- ☐ Pension number or statement
- ☐ Superannuation statement or membership number.

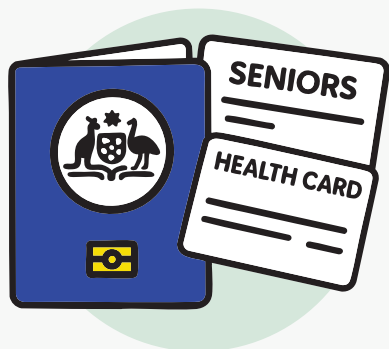
# Tax



Provide the deceased person's **tax information**. Tax is money the deceased person owes to the government.

- ☐ Tax File Number
- ☐ Last income Tax Return
- ☐ Last Income Tax Assessment notice
- ☐ PAYG summaries
- ☐ Australian Business Number.

# Cards



Provide the passport and any **cards** the deceased person had.

- ☐ Passport
- ☐ Seniors card
- ☐ Pension card
- ☐ Medicare card
- ☐ Health insurance card.

# Licences



Provide any **licenses** the deceased person had.

- ☐ Driver licence
- ☐ Firearms licence.

# Contact us

You can contact us to get more information.

There are many ways to contact us.



## Call us

[1300 360 044](tel:1300360044)



## Visit our website

[www.pt.qld.gov.au/customers](http://www.pt.qld.gov.au/customers)

If you do not speak English



## Use the free Translating and Interpreting Service or TIS

Call 131 450

If you need help to speak or listen



The National Relay Service can help you make a phone call.

## Use the National Relay Service (NRS)

Go to the National Relay Service website

[www.accesshub.gov.au](http://www.accesshub.gov.au)

Call 1800 555 660

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