

# DECEASED ESTATE DOCUMENT CHECKLIST

This checklist is a guide to the type of information that may be required when you make an appointment with Queensland Public Trustee to commence administration of a deceased estate.

Please bring along as much information as you can, but don't worry if you can't find everything. Please do not go to any expense to purchase any records you do not have.

Certificates	
Death Certificate	An original death certificate of the deceased is required to administer the estate.
Other certificates	<ul style="list-style-type: none"><li>• Certified copy of death certificate of any beneficiary named in Will who has died (only if available).</li><li>• If no Will, certified copy of birth, death and marriage certificates (only if available).</li></ul>
Beneficiaries	
Beneficiaries named in Will	<p>Details of beneficiaries named in the Will including:</p> <ul style="list-style-type: none"><li>• Full name</li><li>• Residential address</li><li>• Email address</li><li>• Contact number</li><li>• Date of birth</li></ul>
Assets and Liabilities	
Bank accounts / term deposits	<ul style="list-style-type: none"><li>• Recent bank account and term deposit statements</li></ul>
Shares / investments	<ul style="list-style-type: none"><li>• Reference / security reference number (SRN) or Holder Identification number (HIN)</li><li>• Share certificates</li><li>• Dividend and investment statements</li><li>• Details of broker or financial advisor</li></ul>
Real Estate	<ul style="list-style-type: none"><li>• Keys (if required)</li><li>• Copy of current certificate of insurance</li><li>• Latest rate notices</li><li>• Details of rental properties</li></ul>
Vehicles (cars, boats, caravans, trailers)	<ul style="list-style-type: none"><li>• Vehicle registration papers</li><li>• Copy of current Insurance certificate</li></ul>

## Assets and Liabilities (continued)

Assets	Your estimate of the value of estate assets including: <ul style="list-style-type: none"><li>• Vehicles</li><li>• Furniture</li><li>• Jewellery</li></ul>
Businesses	<ul style="list-style-type: none"><li>• Company/partnership details</li><li>• Name of accountant</li><li>• Name of solicitor</li></ul>
Funeral	Funeral account or prepaid funeral documents / receipt if paid
Utilities	<ul style="list-style-type: none"><li>• Latest telephone account (include mobile phone and internet if applicable)</li><li>• Latest electricity account</li><li>• Latest gas account</li><li>• Cable/digital television account</li></ul>
Other liabilities	Copies of any other outstanding accounts

## Financial management

Financial Attorney or Administrator	<ul style="list-style-type: none"><li>• Power of Attorney document (if a Financial Attorney was acting for the deceased prior to their death)</li><li>• QCAT Decision or Court Order (if a Financial Administrator was acting for the deceased prior to death)</li></ul>
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## Income and tax

Tax	<ul style="list-style-type: none"><li>• Tax File Number</li><li>• Copy of last Income Tax Return (include details of Tax Agent)</li><li>• Copy of last Income Tax Assessment</li><li>• PAYG summaries</li><li>• Australian Business Number (ABN) if registered for GST</li></ul>
Income	<ul style="list-style-type: none"><li>• Details of any current employment, salary, wages</li><li>• Pension numbers / statements of pension</li><li>• Recent Superannuation fund statements / membership number</li></ul>

## Cards and memberships

Cards	<ul style="list-style-type: none"><li>• Passport</li><li>• Seniors card</li><li>• Pension and entitlement card</li><li>• Medicare card</li><li>• Private health fund</li></ul>
Licences	<ul style="list-style-type: none"><li>• Driver licence</li><li>• Firearms licence</li></ul>