

A communication guide for deceased estates

Contact us

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 www.pt.qld.gov.au/customers

This guide explains how we communicate with you when you are the beneficiary of a deceased estate being administered by Queensland Public Trustee.

Communicating at a time of grief

The loss of a loved one is never easy. When someone close to you passes away, dealing with a deceased estate while you are grieving can be difficult. It may be overwhelming to think about what steps to take and what is required of you. Our deceased estates team are here to guide you through each stage of the process and answer any questions and concerns you have along the way.

For some people, they are ready to progress matters quickly. For others, they need more time to process their grief before they can consider matters of the estate. Whatever your situation, we will be here to work with you when you are ready.



▼ Here are the ways we communicate with you during key phases of administering the estate.

Commencing estate administration

Contact with key beneficiary

- Initial contact (phone or in person)
- Onboarding meeting (phone, video conference or in person).
- Confirmation letter.

Administering the estate

Contact with all beneficiaries

- Written communications (every 2 months)
- Calls/emails as required to seek information and feedback.

Finalising the estate

Contact with all beneficiaries

- Phone call to confirm your bank details
- Letter confirming finalisation of the estate.

Initial contact with key beneficiary

When we become aware of a deceased estate, we speak to a key beneficiary to discuss how to commence the administration process.

Following an initial phone call, we will request further information to help us establish details of the estate. This involves completing the Customer Profile Form to tell us what you know about the estate, and key documents we will need to start the process.

Onboarding meeting

Once we have the required documents, we arrange a time to review the information with the key beneficiary. It's at this meeting that we can provide more information about the processes we take to administer the estate, our fees and anticipated timeframes. Other beneficiaries may also attend this meeting.

We can meet either in person, over the phone or via a video conference call. The first meeting is also an opportunity for us to:

- advise beneficiaries of their entitlements under the terms of the Will
- explain what's involved in the estate administration process
- discuss any issues that may affect the estate
- confirm how best to communicate with you throughout the process.

Allocation to our Deceased Estates team

Following the onboarding meeting, the estate will be allocated to our deceased estates team. They will be your main point of contact throughout the administration of the estate.

Within two weeks all identified beneficiaries will receive a first written communication outlining key information and some additional documents to complete and return to us.

Ongoing regular communications every 2 months

We will provide written updates every two months to keep you updated about:

- what activities have been completed
- what activities will be undertaken next
- any updates to the initial fee estimate and reasons why
- any issues that may cause time delays
- additional information or documents we require from you to progress matters
- updates to the assets and liabilities identified for the estate.

In addition to these written updates, we may contact you by email or phone for certain matters such as confirming bank details or other information you have provided to us.

Most customers find these regular updates are sufficient to keep them informed about the process. However, if you would like to receive any additional communications or have preferences about how you'd like to receive information from us, please let us know at your onboarding meeting.

Distributing assets to beneficiaries

The time it takes to finalise an estate varies greatly depending on the complexity involved. On average most estates take 12 months to be finalised, while others can take less or more time depending on the complexity of the estate.

When we are ready to distribute funds or assets to beneficiaries, we will call you to confirm your bank details and make you aware that funds or other assets will soon be transferred to you.

Sometimes we can partially distribute some of the assets before the estate is finalised. If this is the case, we will keep you informed and advise when we think the final distribution of assets will be completed.

Finalising the estate

We will call you when the estate is ready to be finalised followed by a written confirmation. This communication includes a Statement of Account that provides details of the estate assets and how they were distributed, debts paid and all costs and expenses incurred by the estate.



Your feedback

Once the estate is finalised we may contact you to seek feedback about our services. This helps us to identify areas where we can improve and shows us where we are making a difference to the people we serve.