Public Trustee
Estate Administration Appointment Checklist

Please use this checklist to gather information to bring to your appointment with Public Trustee which may be required for the estate administration process.

Please don't worry if you can't find everything. Bring what you have and we can sort the rest out.

Beneficiaries		
Family	Please bring details of immediate family members	
Beneficiaries named in Will	Please bring details of beneficiaries named in the Will including; • Legal and full correctly spelt names • Residential addresses • Email addresses • Contact numbers • Dates of birth	
Funerals		
Funeral Arrangements	Funeral account, funeral plan, funeral insurance or prepaid funeral documentation	
Certificates		
Death Certificate	Original Death Certificate – we need the original for administration purposes and cannot accept copies	
Other certificates	Birth certificate, marriage certificate, change of name certificate, decree nisis – may be required	
Assets & Liabilities		
Real Estate	Certificate of Title/title reference Documents relating to any mortgages or loans associated with Real Estate	
Vehicles	Motor vehicle registration papers and insurance details	
Shares/Investments	Security Reference Numbers – these can be found on dividend statements/company correspondence	
Bank Accounts/Term Deposits	Bank passbooks, cheque books and statements, term deposit details, credit/key cards	
Superannuation	Name of Fund and Member Number	
Insurance	Life insurance policies	

Businesses	Details of any business owned (or co-owned) by the deceased person	
Tax		
	Capital Gains Tax Records (where applicable) Copy of last Income Tax Return and last assessment notice (if lodged within 5 years or Tax File Number if no other information held) Any available information for tax purposes for the current financial year	
Accounts		
Utilities	Receipted accounts for last payment of telephone, electricity , gas water rates, land tax, council rates, building & contents insurance	
Liabilities	Any outstanding accounts	
Online/Digital Assets	Details of any digital assets such as online betting accounts	
Cards		
	Driver's Licence Seniors Card Pension Card and Entitlement Card SA Ambulance Medicare Card Private Health Fund Store Account Cards (eg Myer, David Jones etc.)	

Please call us on (08) 8226 9931 if you have any questions in relation to the estate, to determine what documentation may be required or to make an appointment.

Please check with Public Trustee before sending in any documents by registered mail.