

# Notification of Death Form

We're here to support you through this challenging time so you can focus on the things that matter most. It's important to us to work with you to ensure your loved one's accounts remain protected and safe.

The first step in letting us know of your loved one's passing is by a family member or support person completing this Notification of Death Form.

Along with this form, please provide any one of the following documents:

- A certified copy of death certificate
- A certified copy of a medical report
- A certified copy of a police report

If you have engaged a solicitor, we only require a letter from your solicitor confirming the customer's name, date of birth and date of passing.

You can choose to send the Notification of Death and the Deceased Estate Representative forms together or send the Notification of Death form as an initial step.

Upon receipt of the Notification of Death Form and proof of passing, we'll provide you as the notifier with a letter confirming the actions we have taken to protect the accounts and what is required to provide you with information on your loved one's accounts.

## 1. Details of the Deceased

First Name

Surname

Date of Death

Date of Birth

Contract number (if known)

## 2. Notifier's details

**Relationship to the Deceased:**

☐ Executor/Administrator ☐ Next of Kin ☐ Other – please specify

**Name:**

Title

First Name

Surname

Address

Suburb

State

Postcode

Phone

Mobile

Email



Please return all documents to us:

✉ [DEEstates@capital-finance.com.au](mailto:DEEstates@capital-finance.com.au)

🏠 Estates Management – Mailstop 30.A.3  
GPO Box 3433  
Sydney NSW 2001

If you require any assistance in relation to the estate, please contact our business assist estates management team on:

☎ 1800 331 665 option 2  
Monday–Friday, 8:30am–5pm AEST

### 3. Privacy Statement

All personal information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at [Capital Finance Privacy Statement](#).

Our Privacy Statement also provides information about how you can access and correct your personal identification and make a complaint. You do not have to provide us with any personal information, but if you don't, we may not be able to process your request.

### 4. Other acknowledgements and consents

Where you have provided information about another individual, you must make them aware of the fact.

### 5. Tax reporting obligations

We are required under domestic and international laws to collect and report financial and account information relating to individuals and organisations who are, or may be, foreign tax residents. We may ask you whether you or any shareholder, beneficiary, settlor or controlling person are a foreign tax resident from time to time, such as when you open an account with us, or if your circumstances change. If you do not provide this information to us, including information about the foreign tax identification number for all countries you or any shareholder, beneficiary, settlor or controlling person are a foreign tax resident of, we may be required to limit the services we provide to you.

Unless you tell us otherwise, by completing this form, you certify that you, any shareholder, named beneficiary, settlor or controlling person is not a foreign tax resident. You must tell us if you, or any shareholder, named beneficiary, settlor or controlling person is, or becomes, a foreign tax resident (unless an exemption applies, such as for shareholders of listed companies). Where there are no named beneficiaries (e.g. for beneficiaries identified only as a class) you must tell us if a beneficiary is a foreign tax resident immediately when any decision is made to identify such beneficiary and, in any case, before such distribution is to be made to them. You may contact us to provide foreign tax residence information by calling 1300 725 863. We cannot give tax advice, so please contact your independent tax advisor if you need help finding out whether any person is a foreign tax resident.

#### Definitions.

"We", "our", "us" means Capital Finance Australia Limited ABN 23 069 663 136 which forms part of the Westpac Group.

