

Authority To Release Assets

Purpose of this form

For estate representative(s) to authorise the Bank to reimburse or make payments in relation to funeral or estate expenses, and/or disperse funds and settle the estate. If you would like support with completing this form, please email us at operations@unloan.com.au.

What you need to know and do:

- This form should be completed by the deceased's representative (e.g. Estate Executor or Next-of-Kin, or co-borrower).
- As you are providing personal and possibly *sensitive personal* information, in the Death Certificate, please remember, while we take strict precautions to protect your information, email does contain a risk of unauthorised access.
- We will suspend access to the account/s and any redraw from the deceased's log in credentials to prevent unauthorised access to the accounts.
- If the deceased held a life insurance policy, you should contact the insurer to find out whether you can lodge a claim.
- All supporting evidence must be certified, (i.e. death certificate, Will, Letters of Administration or Probate) and emailed to us at operations@unloan.com.au. If you are having difficulty obtaining a death certificate, or the death certificate is not in English, please contact us to discuss alternative documents that may be acceptable (for example, a verified copy of a medical report).
- Privacy Notice – We collect your name, contact details and relationship to the deceased so we can identify the deceased customer's details and confirm your identity as an informant of the deceased. More information about how we collect and handle your personal information, including how you can access your personal information or make a complaint, is available in our Privacy Policy at: <https://www.unloan.com.au/important-information/privacy>.
- Once you have completed this form, follow the 'Next Steps' to provide us with this form and required documents.

Section 1 – Deceased customer details

Full name

Address

<input type="text"/>	
<input type="text"/>	<input type="text"/>
State	Postcode

Date of Birth (DD/MM/YYYY)

Section 2 – Will/Probate details (this helps us decide what documents will be required to finalise the estate's accounts)

Is there a Will? Yes No Unsure

If answered "No" or "Unsure" to the above question, confirm deceased customer's relationship status (choose all that apply):

Widowed Married / Separated Never Married De Facto Relationship / Domestic Partnership Divorced

Length of time the deceased was separated, divorced or in a de facto relationship: years months

Has anyone applied (or is intending to apply) for **Probate** or **Letters of Administration**? Yes No Unsure

Please Note:

A **Grant of Probate** is a document issued by the Supreme Court that confirms the validity of a Will and authorises the executor(s) to act. Alternatively, **Letters of Administration** may be granted by the Supreme Court giving authority to an administrator to finalise the estate (e.g. if there isn't a Will).

Section 3 – Funeral and Estate Expense Payment or Reimbursement

Please Note:

The below account details are for the reimbursement of funds, not the deceased customer details. Expenses paid/reimbursed must relate to the estate. Reimbursements will only be repaid to the person who has affected the payment, with appropriate proof of payment. We are unable to make payments via BPAY®.

I/We authorise payment of estate expenses or reimbursement to the following account(s):

	Account Name	BSB Number	Account Number	Payment amount \$
1.				
2.				
3.				

Section 4 - Authority to Release Assets and Acknowledgment

Please Note:

If there is more than one estate representative, then each person must provide their details and sign below; or alternatively each additional claimant will need to provide a separate **Authority to Release Assets form** (with matching payment instructions) or **Consent by a Beneficiary/Executor/Next-of-kin form**.

Payment Authorisation and Acknowledgment:

Without production of a Grant of Probate of the Will, or Letters of Administration of the estate:

- I/We indemnify the bank against any actions or claims which may be made by any person for this payment
- I/We undertake to reimburse the bank for this money and any other costs if it is subsequently proved that I/we are not entitled.

Executor/Administrator/Claimant 1		
Title	Full Name	
Residential Address (not PO Box)		
		State
		Postcode
Postal Address or PO Box – (if you would rather we send correspondence there)		
		State
		Postcode
Best Contact Number	Email (optional)	Date of Birth (DD/MM/YYYY)

To satisfy Government Regulations it is necessary for the Bank to identify you by sighting direct evidence of your identity. Please provide certified copies of your Identification documents. If these have been previously provided. Please disregard.

I acknowledge the information and payment instructions I/we have provided are correct.

*Signature Date (DD/MM/YYYY)

Executor/Administrator/Claimant 2 (if applicable)		
Title	Full Name	
Residential Address (not PO Box)		
		State
		Postcode
Best Contact Number	Email (optional)	Date of Birth (DD/MM/YYYY)

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I acknowledge the information and payment instructions I/we have provided are correct.

*Signature Date (DD/MM/YYYY)

Executor/Administrator/Claimant 3 (if applicable)		
Title	Full Name	
Residential Address (not PO Box)		
State		Postcode
Best Contact Number	Email (optional)	Date of Birth (DD/MM/YYYY)

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Executor/Administrator/Claimant 4 (if applicable)		
Title	Full Name	
Residential Address (not PO Box)		
State		Postcode
Best Contact Number	Email (optional)	Date of Birth (DD/MM/YYYY)

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*Signature Date (DD/MM/YYYY)

Next steps: Email this form with certified copies of all required supporting documentation to: operations@unloan.com.au . Please don't send original documents. Once provided, we will review and provide confirmation on the outcome or further requirements within 14 days.
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