

THIRD PARTY CHECKLIST – ESTATE ADMINISTRATION

[who to notify]

- (a) The below table sets out the suggested third parties that may need to be contacted regarding the estate of the deceased (Estate).
- (b) All parties listed are examples only. Specific advice should be sought based on the circumstances of the Estate and deceased, including any relevant time frames for interacting with third parties and administering the Estate.
- (c) If you would like further advice or assistance in dealing with any third parties, please contact us.

	Third Party	Comments	Completed?
1.	Financial institutions	<p>These include for example, banks, mortgage brokers, superannuation funds, Insurance funds and health funds.</p> <p>Each institution will have its own process for dealing with deceased estates and often depend on the nature and value of the interest with that institution.</p> <p>Executors should be aware that contacting an instruction to notify them of the death of the deceased is likely to lead to the account being frozen.</p>	
2.	Utilities	<p>These include for example, phone (mobile and land lines), electricity, internet, water, post office boxes etc.</p> <p>As with financial institutions, each institution will have its own process for dealing with deceased estates and often depend on the nature and value of the interest with that institution.</p>	
3.	Australian Tax Office	<p>Specific advice should be sought regarding the tax issues for the Estate, including the manner and timing for submitting returns for the deceased and the Estate.</p> <p>More information can be found here: https://www.ato.gov.au/Forms/Notification-of-a-deceased-person/</p>	

	Third Party	Comments	Completed?
4.	Electoral Commission	<p>The electoral commission should be notified of the death of the deceased to avoid, for example, any administrative fines for non-attendance at voting events.</p> <p>Often the Department of Births, Deaths and Marriages will perform this. However, an executor should ensure this has been done.</p> <p>More information can be found here: http://www.aec.gov.au/FAQs/Electoral_Roll.htm</p>	
5.	Land Registries	<p>Any real property in the name of the deceased will (at the right interval and in a manner appropriate for the circumstances) need to be transferred out of the name of the deceased.</p> <p>Specific advice should be sought regarding the process and implications of this before proceeding.</p>	
6.	ASIC	<p>The Australian Securities and Investments Commission (ASIC) is responsible for ensuring compliance with laws relating to corporations in Australia.</p> <p>To the extent that the deceased had any interest in companies, ASIC should be notified of the deceased's death and any subsequent transfer of their interests or roles as an office of a corporation.</p> <p>Specific advice should be sought regarding the process and implications of this before proceeding.</p>	
7.	Share Registries	<p>Where the deceased held shares in listed companies, the appropriate share registries should be notified.</p> <p>Often this is most effectively achieved through liaising with the deceased's broker.</p> <p>Specific advice should be sought regarding the process and implications of this before proceeding.</p>	
8.	Centrelink/Department of Veteran Affairs	<p>Executors should notify government departments where they deceased was receiving any benefits.</p>	

	Third Party	Comments	Completed?
		<p>It is also important to be aware that any overpayment by Centrelink after the death of the deceased is likely to be required to be required to Centrelink. As such, the timing of cancelling any benefits is important.</p> <p>More information can be found for Centrelink here: https://www.humanservices.gov.au/individuals/subjects/what-do-following-death#a3</p> <p>More information can be found for Department of Veteran Affairs here: https://www.dva.gov.au/benefits-and-payments/income-support/managing-your-pension/chapter-8-what-do-when-someone-dies</p>	
9.	Medicare	<p>Medicare will need to be identified regarding the deceased.</p> <p>More information can be found here: https://www.humanservices.gov.au/individuals/subjects/what-do-following-death#a3</p>	
10.	Queensland Transport	<p>Executors will need to update the details regarding the deceased's licence and any vehicle in the name of the deceased.</p> <p>More information on vehicle registration (for Queensland) can be found here: file:///C:/Users/CPayne/Downloads/deceasedestatefactsheet.pdf</p> <p>More information on obtaining a refund for a licence fee (for Queensland) on behalf of the deceased can be found here: https://www.qld.gov.au/transport/licensing/driver-licensing/surrender</p> <p>More information regarding GoVia account cancellation (for Queensland) can be found here: https://www.govia.com.au/help/managing-my-account/account-updates/closing-the-account-of-someone-who-has-died</p>	
11.	Mailing Lists	<p>If applicable, the executors can register the death of the deceased with the Association for Data-Driven Marketing and Advertising to cease any specific marketing material sent to the deceased.</p> <p>More information can be found here: https://www.adma.com.au/</p>	

	Third Party	Comments	Completed?
12.	Social Media	<p>Each operator will have its own process for dealing with deceased estates.</p> <p>More information can be found here:</p> <ul style="list-style-type: none">(a) Facebook: https://www.facebook.com/help/1506822589577997/(b) Twitter: https://help.twitter.com/en/rules-and-policies/contact-twitter-about-a-deceased-family-members-account(c) Instagram: https://help.instagram.com/264154560391256(d) Google: https://support.google.com/accounts/troubleshooter/6357590?hl=en(e) LinkedIn: https://www.linkedin.com/help/linkedin/ask/TS-RDMLP?lang=en	