

Instructions for Use: This checklist is a vital tool designed to ensure all necessary persons and organisations are contacted when dealing with the passing of a loved one. You can either print this document and keep a copy with your Will or important paperwork for your own family, or use it when administering a loved one's estate.

| Category | Person or Organisation | Notified (Yes/No) | Account Details, Notes, or Phone Number |
|--------------------|---|-------------------|--|
| Legal & Estate | Family and friends | | |
| | Executor of the Will | | |
| | Legal professional (e.g., Probate Solicitor) | | Bennett Carroll Solicitors: 1300 334 566 |
| | Accountant | | |
| | Public Trustee (if applicable) | | |
| | Professional Bodies/Licences (e.g., Medical, Trade) | | Cancel certifications/licences. |
| Government & Taxes | Australian Tax Office | | Phone: 132 865 |
| | Centrelink payments | | Phone: 132 300 |
| | Child Support services | | Phone: 131 272 |
| | Department of Veterans' Affairs | | Phone: 133 254 |
| | Australian Electoral Commission | | Phone: 132 326 |
| | Medicare services | | Phone: 132 011 |
| | Vehicle registration and licensing authorities | | Cancel registration/transfer ownership. |
| | | | |

The Estate Administration Checklist: Who to Notify

Presented by Bennett Carroll Solicitors

| Category | Person or Organisation | Notified (Yes/No) | Account Details, Notes, or Phone Number |
|-----------------------------------|---|-------------------|--|
| | Driving Licence Authority | | Formally cancel the deceased's driver's license. |
| | Passport Office | | Cancel the passport to prevent identity fraud. |
| | Foreign pension authority | | |
| | Foreign pension authority (contact Centrelink's International Services) | | Phone: 131 673 |
| Financial & Insurance | Banks, credit unions | | Account number/Details: |
| | Credit card/hire purchase | | Account number/Details: |
| | Superannuation fund | | Fund name/Details: |
| | Investment/Brokerage Firms | | Notify regarding stocks, bonds, or mutual funds. |
| | Insurance companies | | |
| | Home/Contents/Motor Vehicle Insurers | | Update policy or cancel coverage for assets. |
| | Health benefits fund | | |
| | Funeral insurance | | |
| | Credit Reporting Agencies (e.g., Equifax) | | Request a 'Deceased Alert' on file. |
| Health & Care Services | Preferred funeral director | | |

| Category | Person or Organisation | Notified (Yes/No) | Account Details, Notes, or Phone Number |
|----------------------|--|-------------------|--|
| | Health professionals (e.g. doctor, dentist) | | |
| | Hospital | | |
| | Home Care/Aged Care Providers | | Cancel all booked services. |
| Property & Utilities | Tenant: Notify the Landlord or Property Agent. | | |
| | Owner/Landlord (renting out the property): Notify the Property Manager and/or the Tenants. | | |
| | Owner-Occupier (living in the property): Notify the Mortgage Lender (if there's a loan). | | |
| | | | |
| | Local council | | Rates, local services. |
| | Body Corporate/Strata Management | | If the deceased owned a strata property. |
| | Utilities (e.g., gas, electricity, and phone companies) | | Account details: |
| | Telecommunication providers (e.g. phones, internet) | | Cancel or transfer accounts. |
| Personal & Digital | Employers | | For final wages and entitlements. |
| | Clubs (e.g. RSL) | | |
| | Religious advisor | | |
| | Social Worker | | |

| Category | Person or Organisation | Notified (Yes/No) | Account Details, Notes, or Phone Number |
|----------|---|-------------------|--|
| | Public Services (e.g. library) | | Return items, cancel membership. |
| | Local post office | | Commence redirection or hold. |
| | Social Media Platforms (e.g., Facebook, Instagram) | | Request memorialisation or closure. |
| | Email Accounts & Password Manager Services | | Gain access to digital assets/accounts. |
| | Subscription Services (e.g., Netflix, Local Paper, Spotify) | | Stop recurring billing. |
| | Pet Care/Veterinarian | | Arrange for ongoing care and notify the vet. |

Guidance and Support

Navigating the emotional and legal obligations after a passing can be complex and time-consuming. Having experienced legal professionals on your side ensures the estate is administered correctly and efficiently.

- **Firm Name:** Bennett Carroll Solicitors
- **Phone:** 1300 334 566
- **Email:** info@bcglaw.com.au
- **Web:** www.bcglaw.com.au
- **Next Step:** Call us today for a confidential discussion about your next steps.