

# Estate Instructions



For use when Probate/Letters of Administration have been obtained.

DE-I




## Deceased Customer's Details

Full Legal Name

Date of Death                      /                      /

## Deceased Customer's SBS Account Details

0	3	1	3			-								-		
<b>Bank      Branch Number</b>							<b>Account Number</b>								<b>A/c 1 Suffix</b>	

 ,  , 

Investment Account				-		-					
Investment Account				-		-					
Investment Account				-		-					
Investment Account				-		-					

## Instructions

- ☐ Please close all Accounts/Investments above immediately.
- ☐ Please close all Accounts/Investments above on their respective maturity dates.
- ☐ Please action the following instructions:

### Bank Account Details for Disbursement (if applicable)

Name of Account Holder:

					-									-			
<b>Bank</b>										<b>(Attach proof of bank account details)</b>							
<b>Branch Number</b>										<b>Suffix</b>							

To be signed by the Executor/Administrator(s) and witnessed by a Solicitor, Justice of the Peace, or SBS Bank Team Member:

### Executor/Administrator 1

Signature

Date 

D	D	M	M	Y	Y	Y	Y
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**Witnessed by**

Witness Name

Witness Signature

### Executor/Administrator Details - Applicant 1

Full Name of Executor/Administrator

Date of Birth / /

Residential Address (Not a PO Box)

### Executor/Administrator Details - Applicant 2

Full Name of Executor/Administrator

Date of Birth / /

Residential Address (Not a PO Box)

## Supporting Document Checklist

Please supply the following documentation to be submitting in support of this claim:

- ☐ Certified copy of Death Certificate.
- ☐ Proof of bank account and name of account holder for funds to be credited to.
- ☐ Certified copy of current photo ID and address verification for all Executors/Administrators.
- ☐ Certified copy of Probate or Letters of Administration.

## Executor/Administrator 2

Signature

Date

**Witnessed by**

Witness Name

Witness Signature