

FACT SHEET

Checklist for when someone dies



Road Trauma
Support WA



This fact sheet is designed to help you get started with the practical and legal tasks you will need to complete after someone has died.

What do I need to do first?

There are two main tasks that will need to be undertaken:

1. Administering the estate; and
2. Notifications.

This may include:

- Birth, marriage/divorce and death certificates;
- All unpaid bills (for payment by the Executor);
- Insurance policies – life, health, property;
- Bank accounts, mortgages, superannuation, investments, credit card statements;
- Property – mortgages;
- Vehicles – loans, licences;
- Tax File Number, previous tax returns; and
- The deceased persons' Will.

Many bank accounts and bills are now online. If you don't have access, contact the relevant bank or service organisation to request it. You will probably be asked to provide a copy of the death certificate. Death certificates are available from the Registry of Births, Deaths and Marriages, once the Coroner has signed off on an inquiry or inquest into the death.

The funeral director is also usually able to obtain a copy of the death certificate on your behalf. If there is a delay due to coronial proceedings, you may be able to apply for an interim death certificate from the Registry of Births, Deaths and Marriages. See relevant contacts on the back page.

There are a number of people and organisations that will need to be notified about the death. This helps to finalise the person's affairs and may assist you to get the help you need.



Road Trauma
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Administering the estate

The Will is a legal document which details how a person's belongings will be dealt with when someone dies. The Will usually specifies a chosen Executor(s).

The Executor of the will is responsible for administering the estate, which involves applying for probate; valuing the estate; securing the estate (including insurance if required), completing tax returns (this may involve notifying the deceased's accountant, or seeking advice from the Australian Taxation Office); paying all debts; collecting monies owed; distributing assets and other tasks.

One of your first tasks is to find out who the Executor of the will is and contact them as soon as possible. If you are the nominated Executor and don't feel able to undertake this role, you may arrange for someone to assist you or nominate another Executor. If you prefer, you can appoint the Public Trustee to administer the estate.

In some cases, the Will does not name an Executor, or the deceased may not have left a valid Will. In these situations you will need to contact an independent lawyer or the Probate Office at the Supreme Court of Western Australia for advice. The Supreme Court deals with all matters involving wills and the administration of deceased estates. This includes, where necessary, appointing a person to deal with a deceased person's property following death – again, this may be the

Public Trustee if appropriate. Other sources of information on these matters include the Citizen's Advice Bureau and community legal centres – see contacts on the back page.

Who do I need to notify about the death?

There are a number of people and organisations that will need to be notified about the death. This helps to finalise the person's affairs and may assist you to get the help you need. We have provided a checklist of some of the most common notifications on the next page. Using the checklist will help you to keep track of this task. Not all of these will be relevant and you will probably find others as you process the deceased person's paperwork.

As you notify organisations, it's best to keep a copy of all correspondence or emails, as some organisations will require you to complete further paperwork.

Many people find this task stressful and overwhelming and it can be distressing to have to repeat the same information over and over again. It may be better to ask a friend or family member to help with this and most will be glad to be able to do something practical to assist you. It may also be helpful to write a letter or email to each organisation. A copy of a draft letter can be downloaded from our website at: http://www.rtswa.org.au/useruploads/files/fact_sheet_-_checklist_notification_letter.pdf

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Checklist of people/organisations to notify:

- | | |
|--|---|
| <input type="checkbox"/> Accident insurance | <input type="checkbox"/> Loyalty programs |
| <input type="checkbox"/> Accountant | <input type="checkbox"/> Magazine and newspaper subscriptions |
| <input type="checkbox"/> Ambulance service | <input type="checkbox"/> Meals on wheels |
| <input type="checkbox"/> Australia Post (Passport) | <input type="checkbox"/> Medicare |
| <input type="checkbox"/> Australian Taxation Office 13 28 61 | <input type="checkbox"/> Optometrist |
| <input type="checkbox"/> Banks and/or Building societies | <input type="checkbox"/> Post office / Post office box |
| <input type="checkbox"/> Centrelink 13 62 40 | <input type="checkbox"/> Private Health Insurance |
| <input type="checkbox"/> Age Pension Enquiries 13 23 00 | <input type="checkbox"/> Professional organisations |
| <input type="checkbox"/> Charities and similar organisations | <input type="checkbox"/> School or college |
| <input type="checkbox"/> Chemist | <input type="checkbox"/> Solicitor or the Public Trustees Office |
| <input type="checkbox"/> Church or religious organisation | <input type="checkbox"/> Superannuation Company |
| <input type="checkbox"/> Clubs, associations and other organisations | <input type="checkbox"/> Telephone or Internet Service Provider/s |
| <input type="checkbox"/> Credit card providers – (if different from banks) | <input type="checkbox"/> Trade union |
| <input type="checkbox"/> Credit unions | <input type="checkbox"/> Vehicle insurance |
| <input type="checkbox"/> Dentist | <input type="checkbox"/> Vehicle registration, WA Transport |
| <input type="checkbox"/> Department of Transport (Drivers' License) | <input type="checkbox"/> Veterinary surgeon |
| <input type="checkbox"/> Department of Veterans Affairs 13 32 54 | <input type="checkbox"/> Volunteer organisations supported |
| <input type="checkbox"/> Doctor / Specialist / Hospital | <input type="checkbox"/> Water Corporation |
| <input type="checkbox"/> Electoral Office (AEC) 13 23 26 | |
| <input type="checkbox"/> Electricity or power company | |
| <input type="checkbox"/> Employer or former employer | |
| <input type="checkbox"/> Executor of the will | |
| <input type="checkbox"/> Financial institutions or loan companies | |
| <input type="checkbox"/> Gardening Service | |
| <input type="checkbox"/> Gas | |
| <input type="checkbox"/> Gym, fitness or sporting club | |
| <input type="checkbox"/> Home appliances rental company | |
| <input type="checkbox"/> Home and contents insurance | |
| <input type="checkbox"/> Home delivery service | |
| <input type="checkbox"/> Home nursing or care service | |
| <input type="checkbox"/> Household help / cleaning service | |
| <input type="checkbox"/> Landlord or tenant | |
| <input type="checkbox"/> Life Insurance company | |
| <input type="checkbox"/> Local council or local government | |
| <input type="checkbox"/> Local library | |
-
- | |
|---|
| Others |
| <input type="checkbox"/> Family |
| <input type="checkbox"/> Friends |
| <input type="checkbox"/> Facebook / LinkedIn on-line networks |
| <input type="checkbox"/> Neighbours |

*Checklist used and adapted with kind permission
of Skylight New Zealand www.skylight.org.nz*



Relevant Contacts and Resources

Registry of Births, Deaths and Marriages

www.bdm.dotag.wa.gov.au

Citizens Advice Bureau

www.cabwa.com.au

Landgate

www.landgate.wa.gov.au

Legal assistance options

www.lawsocietywa.asn.au

Community Legal Centres

www.communitylaw.net

Public Trustee

www.publictrustee.wa.gov.au

Probate Office (Supreme Court of WA)

www.supremecourt.wa.gov.au

About us

Road Trauma Support WA is a state-wide service assisting anyone affected by road trauma, regardless of when the incident occurred or what level of involvement (direct or indirect) the person had.

FREE counselling sessions are available.

No referral is required.

We provide:

- Information and support;
- Education and training (costs may apply); and
- Counselling.

We are committed to being respectful of cultural and family values and provide our service in a safe, non-judgemental environment.

Road Trauma Support WA is delivered by Injury Matters with funding from the Road Trauma Trust Account and contract management through the Road Safety Commission.



Every year in WA, thousands of people are impacted by road trauma. Losing family and friends, dealing with injuries, caring for those injured, causing a crash or witnessing a serious crash can have a devastating and enduring impact.

