AUTHORITY TO CLOSE DECEASED'S ACCOUNT(S)

BDCU Alliance Bank®

At BDCU Alliance Bank we appreciate losing a family member is heart breaking and we understand you're dealing with a lot right now, so we've developed this form to make it as simple as possible to settle the deceased's Member's estate.

This form:

- Allows the personal representatives (i.e. executor(s) or administrator(s)), to authorise BDCU Alliance Bank to finalise a deceased Member's estate, combine accounts, close accounts and pay the funds to the estate of the deceased Member.
- Must be signed by all personal representatives of the estate.

Personal representative(s) who are not existing BDCU Alliance Bank Members, are required to provide photo identification (such as a driver's licence or passport). If posting identification to us, please ring us on (02) 4860 4000 during normal business hours so that we can provide details of the certified method of identification which is available.

By completing and signing this form, the personal representatives authorise BDCU Alliance Bank to close the deceased Member's solely held deposit accounts with BDCU Alliance Bank, payout or partially repay any unsecured debts owing to BDCU Alliance Bank in the deceased sole name and to pay the remaining funds, if any, to the Estate of the deceased Member

Section 1 - Deceased Member's Details

Deceased's Full Name _____

Date of Death / / **Deceased Member No.** _____

Section 2 - Deceased's Accounts held with BDCU Alliance Bank (e.g. deposit, savings, loans or credit cards)

Please complete the BDCU Alliance Bank account details held solely in the Deceased's name.

Account Number	Account Type (e.g. deposit, credit card, loan)	Account Balance

Section 3 – Authorisation to close the Deceased's deposit account/s and distribution of Funds

I/We, the personal representative(s) of the estate, as detailed in Section 4, by signing this form in Section 4, authorise and request BDCU Alliance Bank to: **(a) close all deposit accounts** held solely in the Deceased's name; and **(b) clear any debts** held solely by the Deceased in relation to personal loans, credit cards, overdrawn transaction accounts and the like; and **(c) distribute the balance** of the estate funds as follows: (Please tick applicable box and complete).

☐ By transfer to BDCU Alliance Bank Account Number: _____

☐ By cheque payable to the Estate of: _____

Section 4 – Personal Representative/s of the Estate: Personal Details and Signatures

Full Name _____

Address _____

Identification ☐ BDCU Alliance Bank Customer No:_____ ☐ Certified Copy of ID attached

Signature of Representative 1: × _____ **Date signed:** / /

Full Name _____

Address _____

Identification ☐ BDCU Alliance Bank Customer No:_____ ☐ Certified Copy of ID attached

Signature of Representative 2: × _____ **Date signed:** / /

Full Name _____

Address _____

Identification ☐ BDCU Alliance Bank Customer No:_____ ☐ Certified Copy of ID attached

Signature of Representative 3: × _____ **Date signed:** / /

Office Use Only			
Date Signed Form received / /	**Certified documents as ticked in Section 3 attached**	☐ Yes ☐ No
ADM **Branch**	**ID of all Personal Representatives verified**	☐ Yes ☐ No

Please return this completed and signed form together with Identification, if applicable, to any BDCU Alliance Bank branch or post to the address below:

Further information on Deceased Estates is available online at our website: www.bdcualliancebank.com.au.

BDCU Limited ACN 087 649 787 (BDCU) is an agent of Bendigo and Adelaide Bank Limited (Bendigo Bank) ACN 068 049 178 AFSL/Australian Credit Licence 237879 in the distribution of BDCU Alliance Bank® branded products and services.
BDCU Alliance Bank® is a trade mark of Bendigo Bank.

Ph (02) 4860 4000 **Fax** (02) 4861 6222 **Email** memberservice@bdcualliancebank.com.au **Web** www.bdcualliancebank.com.au