



Estate Checklist

Following the death of a loved one you may need to notify some of the following persons or institutions:

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| <input type="checkbox"/> Solicitor (Will & Estate Administration) | <input type="checkbox"/> Financial Planner |
| <input type="checkbox"/> Life Insurance Company | <input type="checkbox"/> Superannuation Funds |
| <input type="checkbox"/> Banks/Financial Institutions | <input type="checkbox"/> Funeral Fund |
| <input type="checkbox"/> Medicare/Health Benefit Fund | <input type="checkbox"/> Employer |
| <input type="checkbox"/> Centrelink/Overseas Pension/Department of Veterans Affairs | <input type="checkbox"/> Services (Water, Gas, Electricity, Telephone, Cable, T.V. Network) |
| <input type="checkbox"/> Accountant/Tax Agent/ATO (Tax Return) | <input type="checkbox"/> Home services (Internet Provider, Deliveries, Lawn mowing, Gardening) |
| <input type="checkbox"/> RMS (Motor Vehicle, Boat Insurances & Registrations) | <input type="checkbox"/> Road Tolling (E-Toll/E-Tag) |
| <input type="checkbox"/> Company Share Registers | <input type="checkbox"/> Medical Practitioner/Dentist |
| <input type="checkbox"/> Landlord/Strata Manager (if applicable) | <input type="checkbox"/> Clubs or Associations |
| <input type="checkbox"/> Minister/Church Association | <input type="checkbox"/> Electoral Roll |
| <input type="checkbox"/> Charitable organisations | <input type="checkbox"/> Library |
| <input type="checkbox"/> Social Networks (Facebook, Twitter etc) | <input type="checkbox"/> Post Office (redirect mail if desired) |

Please feel free to contact Lisa Delalis or John Bateman of our office on (02) 4731 5899 or email us at willsestates@batemanbattersby.com.au should you require any further information or assistance.