

Deceased Customer Advice

USE THIS FORM TO: Notify Great Southern Bank of the death of a valued customer.

1 DECEASED PERSON'S DETAILS

First name: _____ Surname: _____
 Address: _____ Suburb: _____
 State: _____ Postcode: _____ Customer number/s: _____ Date of death: _____

2 YOUR DETAILS

First name: _____ Surname: _____
 Address: _____ Suburb: _____
 State: _____ Postcode: _____ Relationship to deceased: _____
 Customer number/s (if applicable): _____ Phone number: _____
 Email Address: _____
 Signature _____ Date _____

3 PAYMENT OF FUNERAL ACCOUNT

Is payment of a funeral account required? No Yes
 If yes, please provide tax invoice.
 Cheque drawn at branch: No Yes (if yes, please attach copy of the tax invoice and note if paid.)

4 LAST WILL AND TESTAMENT

Attached No (If there is no Will, Letters of Administration may be required.)
 To follow (Please deliver to your nearest Great Southern Bank branch or mail a certified copy to our postal address.)

Identification of executor/s if not already customer of Great Southern Bank

Attached Administrator to follow

Customer number (if executor/s are Great Southern Bank customers):

Probate

Probate is the process of officially proving the validity of a Will by the Supreme Court. Great Southern Bank is protected against legal action when releasing no more than \$15,000.00. All enquiries regarding Probate and Letters of Administration must be referred to the Deceased Estates Officer.

5 ADMINISTRATOR OR EXECUTOR OF ESTATE (IF APPLICABLE)

Please advise the name of PERSON/S, SOLICITORS or TRUST COMPANY administrating the deceased's estate, if applicable.

Name: _____ Company: _____
Address: _____ Suburb: _____
State: _____ Postcode: _____ Customer number/s: _____
Phone number: _____ Fax number: _____
Email Address: _____

6 DEATH CERTIFICATE

Confirmation is required by way of a certified copy of the original Death Certificate.

Attached To follow *(Please deliver to your nearest Great Southern Bank branch or mail a certified copy to our postal address.)*

7 CREDIT CARDS, VISA DEBIT CARDS, EFTPOS DEBIT CARD & CHEQUE BOOK FACILITIES

To enable Great Southern Bank to finalise the account, please return all cards and unused cheques

Attached No cards on issue No cheque book facility
To follow *(Please deliver to your nearest Great Southern Bank branch or mail a certified copy to our postal address – be sure to cut off the top right hand corner of the card to render it inactive before mailing.)*

8 DIRECT DEBITS AND PERIODICAL PAYMENTS

Upon receipt of deceased customer notification all direct debits and periodical payments will be cancelled. If any ongoing direct debit or periodical payment arrangements are to continue please specify details below.

9 EXECUTOR'S INSTRUCTIONS FOR ADMINISTRATION OR ESTATE UPON FINALISATION

Please print using block letters.

9 EXECUTOR'S INSTRUCTIONS FOR ADMINISTRATION OR ESTATE UPON FINALISATION (CONTINUED)

Executor name: 1. 2. 3.

Executor signature: 1. 2. 3.

Date:

10 PRIVACY NOTICE

In this privacy notice, “we”, “us”, “our” means Credit Union Australia Limited (trading as Great Southern Bank), CUA Management Pty Ltd and Credicorp Insurance Pty Ltd (“Great Southern Bank”).

How we collect your personal information

We collect information directly from you and from third parties. Those third parties are listed below. Every time you apply for a product or service we'll let you know what information we need and who we will collect it from.

Why we collect your personal information

We use your information to identify you, assess your credit worthiness, set up and manage your membership, accounts and relationship with Great Southern Bank (including related rewards and insurance programs) and to undertake research and development. In many instances, collection of your information is required by law, for example, under the Anti-Money Laundering and Counter Terrorism Financing Act 2006, the Insurance Contracts Act 1984 and the National Consumer Credit Protection Act 2009. Without collecting your information we may not be able to provide you with our products.

We also use your information for other purposes, including keeping you informed about products and services issued or distributed by Great Southern Bank and trusted third parties.

Who we share information with

We may collect and disclose your personal information from and to third parties including:

- Our agents, assignees and contractors
- Our service providers including those used for identity verification, software/IT support, account management (including payments), mailing material to you, member and product research and accounting, legal and audit services
- Your referees, employers and tax agents
- Government agencies when required or authorised by law
- Courts and dispute resolution schemes
- CUA Group entities
- Credit reporting bodies and other credit providers (including second mortgagees)
- Managers and funding providers of securitisation facilities

- Insurers and re-insurers for policies taken out through Great Southern Bank
- Organisations involved in the administration of our rewards programs
- Debt collection agencies, settlement agencies and valuers
- Guarantors and joint-borrowers
- Other organisations with your consent

We also share limited information, such as your email address, with data aggregators and analysts (including social media and virtual community providers). This helps us provide you with more personalised and timely communications. If you're uncomfortable with this please let us know and we won't use or share your information in this way.

We may also disclose your personal information to trusted third parties depending on the products or services you want. We'll tell you who they are when you apply for that product or service, and refer you to their privacy policy. Some of our service providers are located overseas. Our privacy policy lists the countries where they're located.

Further information

The Great Southern Bank Group Privacy Policy, at www.greatsouthernbank.com.au/privacy-policy or in hard copy on request, includes details about:

- how you can access your information;
- how you can correct information you believe to be inaccurate or incomplete;
- credit reporting including the name and contact details of credit reporting bodies to which we disclose your information, the types of information we disclose and your rights in relation to that information; and
- what to do if you believe that we have breached the Privacy Act, Australian Privacy Principles or the Privacy (Credit Reporting) Code, and how we will handle your complaint.

All privacy queries can be referred to our Privacy Dispute Officer by emailing privacydisputes@gsb.com.au, phoning 133 282, or writing to GPO Box 100, Brisbane QLD 4001.

Once you have completed this form:

Step 1.

Attach the following documents or make arrangements to obtain a copy for forwarding to us:

- Will (or Letters of Administration)
- Death certificate
- Credit cards, Visa Debit Cards, eftpos Debit Card and/or unused cheques
- Funeral invoice (if applicable)

Step 2.

Return it to Great Southern Bank.



Drop it into a branch



Mail it to:

Great Southern Bank
GPO BOX 100, Brisbane QLD 4001

We're here to help

If you need assistance completing this form, call us on **133 282** or drop into your local branch.

You can access any of the personal information you have supplied to us by phoning Great Southern Bank and asking for the Deceased Estates Officer.

Email deceased.estates@gsb.com.au

BRANCH OFFICE USE ONLY

Deceased Customer Advice Form must be completed and forwarded to Brisbane Hub for action.

General Insurance: Customer may have ongoing requirements and may only need to advise a change in cover/rate.

Is change required? Yes No

Note:

All documents must be originals or certified copies of original documents. In some instances the informant may only have one certified copy and is not prepared to surrender it. If this is the case, the document can be copied but must be certified that the original certified copy has been sighted.

No transactions are permitted on single accounts once Great Southern Bank has been advised that the customer is deceased. Power of Attorney and signatory to an account powers cease on death. Funds can only be accessed to cover funeral expenses. All deposit enquiries must be referred to the Deceased Estates Officer.

BRANCH COMMENTS

Staff member:

Branch:

Date:

Signature:

Please email to deceased.estates@gsb.com.au