

Notification of Death Form

We're here to support you through this challenging time so you can focus on the things that matter most. It's important to us to work with you to ensure your loved one's accounts remain protected and safe.

The first step in letting us know of your loved one's passing is by a family member or support person completing this Notification of Death Form.

Along with this form, please provide any one of the following documents:

- A certified copy of death certificate
- A certified copy of a medical report
- A certified copy of a police report
- A funeral service provider's tax invoice or receipt

If you have engaged a solicitor, we only require a letter from your solicitor confirming the customer's name, date of birth and date of passing.

You can choose to send the Notification of Death and the Deceased Estate Representative forms together or send the Notification of Death form documents as an initial step.

Upon receipt of the Notification of Death Form and proof of passing, we'll provide you as the notifier with a letter confirming the actions we have taken to protect the accounts and what is required to provide you with information on your loved one's accounts.

1. Details of the Deceased

First Name

Surname

Date of Death

Date of Birth

Customer Number

2. Notifier's details

Relationship to the Deceased:

☐ Executor/Administrator ☐ Next of Kin ☐ Other

Name:

Title First Name

Surname

Address

Suburb

State

Postcode

Phone

Mobile

Email


Please send all documents to us:

 estatesmanagement@stgeorge.com.au

 Estates Centre of Excellence - IBN77
GPO Box 3433
Sydney NSW 2001

 By visiting a branch

If you require any help in relation to the estate, please contact our Estate Care team on:

 1300 130 549 Monday-Friday, 9am-5pm AEST.
Calling from overseas: +612 9155 7590.

3. Completing Branch Details

Branch Name

BSB

Employee Salary No.

Employee First Name

Employee Surname

Date

4. Privacy Statement

Personal information

We collect personal information from you to process your request, provide you with a product or service, and manage your product or service. We may also use your information to comply with legislative or regulatory requirements in any jurisdiction, prevent fraud, crime or other activity that may cause harm in relation to our products or services and help us run our business. We may also use your information to tell you about products or services we think may interest you.

If you do not provide all the information we request, we may no longer be able to provide a product or service to you.

We may disclose your personal information to other members of the Westpac Group, anyone we engage to do something on our behalf, rewards program administrators and other organisations that assist us with our business.

We may disclose your personal information to an entity which is located outside Australia. Details of the countries where the overseas recipients are likely to be located are in our privacy policy.

As a provider of financial services, we have obligations to disclose some personal information to government agencies and regulators in Australia, and in some cases offshore. We are not able to ensure that foreign government agencies or regulators will comply with Australian privacy laws, although they may have their own privacy laws. By using our products or services, you consent to these disclosures.

We are required or authorised to collect personal information from you by certain laws. Details of these laws are in our privacy policy.

Our privacy policy is available at stgeorge.com.au or by calling 13 33 30. It covers:

- how you can access the personal information we hold about you and ask for it to be corrected;
- how you may complain about a breach of the Australian Privacy Principles or a registered privacy code and how we will deal with your complaint;
- how we collect, hold, use and disclose your personal information in more detail.

We will update our privacy policy from time to time.

For our customers located in the European Union

The General Data Protection Regulation (GDPR) regulates the collection, use, disclosure or other processing of personal data under European Union (EU) law. Personal data means any information relating to you from which you are either identified or may be identifiable. Our collection, use, disclosure and other processing of your personal data may also be regulated by the GDPR.

Please refer to our EU Data Protection Policy on our website at stgeorge.com.au/privacy-reforms for information about how we manage your personal data under the GDPR. The EU Data Protection Policy also forms part of this Privacy Statement.

Other acknowledgements and consents

- Where you have provided information about another individual, you must make them aware of the fact and the contents of the Privacy Statement.

Tax reporting obligations

We are required under domestic and international laws to collect and report financial and account information relating to individuals and organisations who are, or may be, foreign tax residents. We may ask you whether you or any shareholder, beneficiary, settlor or controlling person are a foreign tax resident from time to time, such as when you open an account with us, or if your circumstances change. If you do not provide this information to us, including information about the foreign tax identification number for all countries you or any shareholder, beneficiary, settlor or controlling person are a foreign tax resident of, we may be required to limit the services we provide to you.

Unless you tell us otherwise, by completing this form, you certify that you, any shareholder, named beneficiary, settlor or controlling person is not a foreign tax resident. You must tell us if you, or any shareholder, named beneficiary, settlor or controlling person is, or becomes, a foreign tax resident (unless an exemption applies, such as for shareholders of listed companies). Where there are no named beneficiaries (e.g. for beneficiaries identified only as a class) you must tell us if a beneficiary is a foreign tax resident immediately when any decision is made to identify such beneficiary and, in any case, before such distribution is to be made to them. You may contact us to provide foreign tax residence information by calling 1300 725 863. We cannot give tax advice, so please contact your independent tax advisor if you need help finding out whether any person is a foreign tax resident.

Definitions

"We", "our", "us" means Westpac Banking Corporation ABN 33 007 457 141.

"Westpac Group" means Westpac Banking Corporation and its related bodies corporate.