



A helpful guide to settling an Estate.

We're here to help you with some of the difficult steps and decisions ahead.



If you've recently suffered a loss we understand there can be a lot to arrange and sort out. While it is not essential to deal with an Estate immediately after the person has died, we recommend that you let the bank know of the event as soon as possible.

At Westpac, we have a dedicated team who are here to work with you to settle the accounts of a Westpac customer. Our aim is to make the process as stress-free as possible so we've provided some information here to guide you.

Step by step guide.

To deal with the Estate of a Westpac customer we have a simple three step process to follow:

Step 1

Let us know.

The first step is to let us know. To do this you can come into any branch, or get in touch with the team directly. You'll just need to give us some details of the customer who has died and we can begin the process of settling the estate.

All private accounts of the deceased will then be frozen and any signatory or Enduring Power of Attorney will cease. All joint accounts will remain open and unfrozen. Funds will still be able to be deposited into the account. A case manager from the Deceased Estates Management Team will be in touch to guide you through the next steps.

Step 2

Provide documentation.

When you are ready, and if you are the authorised person to administer the Estate, your case manager will talk you through what forms and documentation you will need to provide.

If Probate or Letters of Administration are required, we can explain what they are and how you can get them. See the checklist provided at the end of this pamphlet for details on documentation we may require.

Step 3

Closure of accounts.

Once your case manager has all the necessary documentation he/she will act upon your instructions to settle the accounts with Westpac. This may include settling any debt that the deceased had with Westpac or disbursement of funds.

Checklist.

Acceptable identification documents to help us identify you:

- 1x primary photographic identification (Passport or Driver License, National Identity Card overseas)
- 2x non-photographic identification (Birth Certificate, foreign citizenship certificate, certificate of NZ citizenship)

We will let you know the documents we need which may include:

- Original or certified copy of the death certificate, and/or
- A letter from the solicitor acting on behalf of the Estate, and/or
- Letter of instruction from the Executors of the Estate
- Original or certified copy of identification for all Executors
- An original Deceased Estate Declaration and Claim/Indemnity form* (if Probate or Letters of Administration are not being sought)
- Original or certified copy of Probate, issued and sealed by the New Zealand High Court if available
- Original or certified copy of Letters of Administration, issued and sealed by the New Zealand High Court
- The original Will (if applicable)

*The Deceased Estate Declaration and Claim/Indemnity form can be downloaded from our Deceased Estate pages on our website westpac.co.nz or obtained from any branch.

General enquiries and to notify us:

Call the Deceased Estates Management Team toll free within New Zealand: **0800 756 872**.
or email us on estate_management@westpac.co.nz

We're here to help.



estate_management@westpac.co.nz



0800 756 872 toll free within New Zealand
+64 9 375 9926 if you are overseas, international toll charges apply



westpac.co.nz

