

Terrace End Law.

ESTATES (PROBATE) – DATAFORM INFORMATION

DECEASED'S INFORMATION

Deceased's Full name:	
Deceased's preferred name:	
Deceased's Occupation:	
Date of Death:	
Place of death:	
Usual Town of Residence	
Gender: his/her	
Gender: he/she	
Gender: him/her	

OTHER DETAILS: (For documents with Will Annexed)

Date of Last Will:	
Town (as stated in Will):	
Date of First Codicil:	
Date of Second Codicil:	

PROBATE:

EXECUTOR 1 full name:	
Town:	
Occupation:	
His/her:	
He/she	
Himself/herself	
EXECUTOR 2 full name:	
Town:	
Occupation:	
His/her:	
He/she	
Himself/herself	
EXECUTOR 3 full name:	
Town:	
Occupation:	
His/her:	
He/she	
Himself/herself	
DECEASED EXECUTOR'S full name:	
Deceased Executor's date of death:	
Deceased Executor's Place of death:	
RENOUNCER'S full name:	
Renouncer's Town:	
Renouncer's Occupation	

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Date of Renunciation:	
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OTHER INFORMATION:

PERSONAL DETAILS

Home address of deceased:	
Living at above address or elsewhere:	
Date of birth:	Age _____ years
Employer's name:	Employer's name:
Deceased's spouse/partner:	
Date of marriage/civil union:	
In relationship for:	_____ years

EXECUTOR(S) AND TRUSTEE(S)

EXECUTOR 1 full name:	
Relationship to deceased:	
Address:	
Email:	
Phone:	
Certified photo ID received	YES / NO
Certified Proof of Address received	YES / NO
EXECUTOR 2 full name:	
Relationship to deceased:	
Address:	
Email:	
Phone:	
Copy photo ID received	YES / NO
Copy Proof of Address received	YES / NO
EXECUTOR 3 full name:	
Relationship to deceased:	
Address:	
Email:	
Phone:	
Copy photo ID received	YES / NO
Copy Proof of Address received	YES / NO

BENEFICIARIES OF ESTATE

BENEFICIARY 1 full name:	
Address:	

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<i>PDF showing name, account no and Bank – received <u>and</u> double-checked</i>	YES / NO
<i>Copy photo ID received:</i>	YES / NO
BENEFICIARY 2 full name:	
<i>Address:</i>	
<i>PDF showing name, account no and Bank – received <u>and</u> double-checked</i>	YES / NO
<i>Copy photo ID received:</i>	YES / NO
BENEFICIARY 3 full name:	
<i>Address:</i>	
<i>PDF showing name, account no and Bank – received <u>and</u> double-checked</i>	YES / NO
<i>Copy photo ID received:</i>	YES / NO
BENEFICIARY 4 full name:	
<i>Address:</i>	
<i>PDF showing name, account no and Bank – received <u>and</u> double-checked</i>	YES / NO
<i>Copy photo ID received:</i>	YES / NO
BENEFICIARY 5 full name:	
<i>Address:</i>	
<i>PDF showing name, account no and Bank – received <u>and</u> double-checked</i>	YES / NO
<i>Copy photo ID received:</i>	YES / NO

AFTER GRANT OF PROBATE:

Date of Grant:	
CIV NO:	

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LIST OF ASSETS

PROPERTY 1 :

Edealing Number:	
Street Address, Suburb:	
Town/City	
Postcode:	
Estate:	
Area:	
Lot and Deposited Plan:	
Record of Title:	

PROPERTY 2:

Edealing Number:	
Street Address, Suburb:	
Town/City	
Postcode:	
Estate:	
Area:	
Lot and Deposited Plan:	
Record of Title:	

BANK ACCOUNTS:

Name of Bank:	
Joint or sole owner?	
Account Number:	
Approximate value:	

Name of Bank:	
Jointly or sole owner?	
Account Number:	
Approximate value:	

Name of Bank:	
Jointly or sole owner?	
Account Number:	
Approximate value:	

Name of Bank:	
Jointly or sole owner?	
Account Number:	

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Approximate value:	
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KiwiSaver:

Name of company	Customer No	Approximate value

Superannuation policies:

Name of company	Policy No	Approximate value

Life insurance policies:

Policy No	Approximate value

Funeral insurance, Southern Cross (funeral benefit) or other Medical Insurance eg SIS, Cigna, State, Tower OR Accident insurance through credit card?

Name of company	Policy No	Type of benefit to be claimed

Shares:

Name of company	Number of shares	Approximate value

Loans owing from Family Members (i.e. an asset to Estate)	
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Name:	
Address:	
Phone:	
Email:	
Approximate amount owing:	

Motor Vehicles/Motorbikes:

Make/Model:	
Jointly or sole owner:	
Registration Number:	
Approximate value:	
Amount Owing:	
Finance Company:	

Make/Model:	
Jointly or sole owner:	
Registration Number:	
Approximate value:	
Amount Owing:	
Finance Company:	

Other assets eg jewellery or individual gems, antiques, motor home, caravan, trailer, vintage or classic car(s), forestry investment, timeshare, stamp collection, gold bars/nuggets

Asset	Reference / Location	Approximate value

Cryptocurrency:

Access number:	
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Notes: _____

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LIST OF LIABILITIES

Loan(s) owing to family member(s) (i.e. a Liability of the Estate):

Loan to	Approx balance owing
Name: Contact details:	
Name: Contact details:	

Credit Cards:

Name of company	Card Number	Approx balance owing

Is there credit charge insurance payable on these cards?

Other Credit Cards, eg Q-Card, GE Money, Farmers Card, Warehouse Card, Fuel Card

Name of company	Card Number or Reference	Approx balance owing

Hire purchase:

Name of company	Customer No/Reference No	Approximate value

Other cardholders to be notified – eg Flybuys, OneCard, Airpoints, Library or other loyalty cards etc

Name of organisation	Card No/Reference No	Expiry date/other information

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OUTSTANDING ACCOUNT PAYMENTS YET TO BE MADE:

\$	Headstone/Memorial expenses
\$	Funeral costs
\$	Payment of personal tax and Estate tax
\$	Accountant Fees
\$	Legal Fees
\$	

Work & Income New Zealand:

Has Work & Income been advised of death? YES / NO

Client/Customer Reference No: _____

Is there a Community Services Card or Gold Card? YES / NO

Possible direct debits or credits/automatic payments – notification required:

- | | |
|---|--|
| <input type="checkbox"/> rates | <input type="checkbox"/> cellphone |
| <input type="checkbox"/> house insurance | <input type="checkbox"/> electricity |
| <input type="checkbox"/> contents insurance | <input type="checkbox"/> gas or bottled gas |
| <input type="checkbox"/> car registration | <input type="checkbox"/> school payments |
| <input type="checkbox"/> car insurance | <input type="checkbox"/> pre-school payments |
| <input type="checkbox"/> health insurance | <input type="checkbox"/> house cleaner |
| <input type="checkbox"/> life insurance(s) | <input type="checkbox"/> lawnmowing/garden maintenance |
| <input type="checkbox"/> superannuation | <input type="checkbox"/> car loan |
| <input type="checkbox"/> newspaper | <input type="checkbox"/> telephone |