

# Notification Templates

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After someone dies, you need to notify dozens of organisations.

Banks. Super funds. Centrelink. Insurance companies. Employers. Councils. Utilities. Each one needs to be told formally, usually in writing.

This section provides letter templates you can adapt and use.

These templates are starting points. You'll need to customise them with specific details (names, account numbers, dates). But they give you the structure and wording to make notifications easier.

How to use these templates:

1. Choose the template that matches who you're notifying
2. Fill in the bracketed information with your details
3. Attach a certified copy of the death certificate
4. Keep a copy of every letter you send
5. Follow up if you don't hear back within 2 weeks

Let's make notifications easier.

NOTIFICATION TEMPLATES FOR EXECUTORS

## TEMPLATE 1: NOTIFICATION TO BANK

[Your Name]  
[Your Address]  
[Your Phone]  
[Your Email]

[Date]

[Bank Name]  
[Branch Address]

Dear Sir/Madam,

Re: Notification of Death - [Deceased's Full Name]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] held the following account(s) with your organisation:

- Account Name: [Account Name]
- Account Number: [Account Number]
- BSB: [BSB]

I am the executor of the estate of [Deceased's Name]. A certified copy of the death certificate is enclosed.

Please advise me of the balance(s) as at the date of death and let me know what happens to each account now. I understand that accounts held in the deceased's sole name are usually frozen until probate, while jointly held accounts generally pass to the surviving account holder. Please confirm how each account is held and what steps you need from me. I will provide a copy of the Grant of Probate once it has been issued, if probate is required for this estate. Not every estate needs a Grant of Probate. Whether you need one depends on the size of the estate and how the assets are held, so check with the bank or a solicitor before applying.

Please also advise if there are any:

- Direct debits or automatic payments linked to this account
- Joint account holders
- Loans, credit cards, or other products in the deceased's name

I would appreciate your response within 14 days.

Yours faithfully,

[Your Signature]  
[Your Printed Name]

Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

## TEMPLATE 2: NOTIFICATION TO SUPERANNUATION FUND

[Your Name]  
[Your Address]  
[Your Phone]  
[Your Email]

[Date]

[Super Fund Name]  
[Super Fund Address]

Dear Sir/Madam,

Re: Death Benefit Claim - [Deceased's Full Name]  
Member Number: [Member Number]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] was a member of your superannuation fund. A certified copy of the death certificate is enclosed.

Please send me:

1. A death benefit claim form
2. Details of the current superannuation balance
3. Information about any binding or non-binding death benefit nomination on file
4. Details of any insurance held through the fund (life insurance, TPD, income protection)

I am the executor of the estate. Please advise what documentation you require to process the death benefit claim.

I would appreciate your response within 14 days.

Yours faithfully,

[Your Signature]  
[Your Printed Name]  
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

### TEMPLATE 3: NOTIFICATION TO CENTRELINK

[Your Name]  
[Your Address]  
[Your Phone]

[Date]

Centrelink  
[Local Centrelink Office Address]

Dear Sir/Madam,

Re: Notification of Death - [Deceased's Full Name]  
Centrelink Reference Number (CRN): [CRN]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] was receiving the following payment(s):  
- [Payment Type, e.g., Age Pension, Carer Payment]

A certified copy of the death certificate is enclosed.

Please cease all payments with effect from [Date of Death] and advise if any payments received after this date need to be repaid.

[If applicable: The deceased's spouse, [Spouse's Name], CRN [Spouse's CRN], may be eligible for bereavement payments. Please advise them of any entitlements.]

Please confirm receipt of this notification and advise of any further action required.

Yours faithfully,

[Your Signature]  
[Your Printed Name]  
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

## TEMPLATE 4: NOTIFICATION TO EMPLOYER

[Your Name]  
[Your Address]  
[Your Phone]  
[Your Email]

[Date]

[Employer Name]  
[HR Department]  
[Employer Address]

Dear Sir/Madam,

Re: Notification of Death - [Deceased's Full Name]  
Employee Number: [Employee Number]

I am writing to notify you of the death of [Deceased's Full Name], who was employed by your organisation as [Job Title]. [He/She] passed away on [Date of Death].

A certified copy of the death certificate is enclosed.

As the executor of [Deceased's Name]'s estate, I request the following:

1. Final pay for any unpaid salary or wages
2. Payment of accrued annual leave and long service leave
3. Details of any superannuation contributions owing
4. Information about any life insurance or income protection policies through the employer
5. Details of any other entitlements (redundancy, bonuses, share options, etc.)

Please advise what documentation you require and the expected timeframe for payment of final entitlements.

Please send all correspondence to the address above.

Yours faithfully,

[Your Signature]  
[Your Printed Name]  
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

## TEMPLATE 5: NOTIFICATION TO INSURANCE COMPANY

[Your Name]

[Your Address]

[Your Phone]

[Your Email]

[Date]

[Insurance Company Name]

[Claims Department]

[Insurance Company Address]

Dear Sir/Madam,

Re: Life Insurance Death Claim - [Deceased's Full Name]

Policy Number: [Policy Number]

I am writing to notify you of the death of [Deceased's Full Name], the insured person under the above policy. [He/She] passed away on [Date of Death].

A certified copy of the death certificate is enclosed.

I am the executor of the estate of [Deceased's Name]. Please send me:

1. A claim form for the death benefit
2. Confirmation of the sum insured
3. Details of the nominated beneficiaries (if any)
4. A list of documents required to process the claim

Please advise the expected timeframe for processing this claim.

I would appreciate your response within 14 days.

Yours faithfully,

[Your Signature]

[Your Printed Name]

Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

## TEMPLATE 6: NOTIFICATION TO UTILITY PROVIDER

[Your Name]

[Your Address]

[Your Phone]

[Date]

[Utility Provider Name]

[Utility Provider Address]

Dear Sir/Madam,

Re: Notification of Death and Account Closure - [Deceased's Full Name]

Account Number: [Account Number]

Service Address: [Service Address]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] held an account with your organisation for [electricity/gas/water/internet] service at the above address.

Please:

1. Transfer the account to my name as executor until the property is sold

OR

2. Close the account as of [Date] and send a final bill to the address below

Please send the final account statement and any refund owing to:

[Your Name]

[Your Address]

Yours faithfully,

[Your Signature]

[Your Printed Name]

Executor for the Estate of [Deceased's Full Name]

## TEMPLATE 7: NOTIFICATION TO COUNCIL (RATES)

[Your Name]  
[Your Address]  
[Your Phone]

[Date]

[Council Name]  
Rates Department  
[Council Address]

Dear Sir/Madam,

Re: Notification of Death - [Deceased's Full Name]  
Property Address: [Property Address]  
Assessment Number: [Assessment Number]

I am writing to notify you of the death of [Deceased's Full Name], who was the owner of the above property. [He/She] passed away on [Date of Death].

I am the executor of the estate. A certified copy of the death certificate is enclosed.

Please update your records and send all future correspondence regarding this property to:  
[Your Name]  
[Your Address]

Please advise if there are any outstanding rates owing.

Yours faithfully,

[Your Signature]  
[Your Printed Name]  
Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

## TEMPLATE 8: GENERAL NOTIFICATION LETTER

[Your Name]  
[Your Address]  
[Your Phone]  
[Your Email]

[Date]

[Organisation Name]  
[Organisation Address]

Dear Sir/Madam,

Re: Notification of Death - [Deceased's Full Name]  
Account/Reference Number: [Number]

I am writing to notify you of the death of [Deceased's Full Name], who passed away on [Date of Death].

[Deceased's Name] held an account/membership/subscription with your organisation. A certified copy of the death certificate is enclosed.

Please:

1. Close the account/cancel the membership/subscription
2. Advise if there are any outstanding payments or refunds owing
3. Update your records to prevent further correspondence

Please send any final statements or refunds to:

[Your Name]  
[Your Address]

Yours faithfully,

[Your Signature]  
[Your Printed Name]

Executor for the Estate of [Deceased's Full Name]

Enclosures: Certified copy of death certificate

### TIPS FOR USING THESE TEMPLATES

- ☐ Always include a certified copy of the death certificate
- ☐ Keep a copy of every letter you send
- ☐ Record the date sent and follow up if no response within 2 weeks
- ☐ Use registered post for important notifications
- ☐ Be clear about what you're requesting
- ☐ Include your contact details
- ☐ Be patient - some organisations take longer to respond than others

# Your Notification Templates

*A checklist of who to notify, and a place to track every notification you send.*

## WHO TO NOTIFY

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Banks (all accounts)  
Super funds  
Centrelink (if applicable)  
Department of Veterans' Affairs (if applicable)  
Employer  
Life insurance companies  
Health insurance  
Home & contents insurance  
Car insurance  
Council (rates)  
Electricity, gas and water providers  
Internet, phone and mobile providers  
Subscriptions (streaming, etc.)  
Gym / club memberships  
Professional associations  
Roadside assistance (NRMA, RACV, etc.)  
Australia Post (redirect mail)  
Electoral Commission  
Medicare  
Australian Taxation Office (via accountant)

# Your Notification Templates (cont.)

## RECORD OF NOTIFICATIONS SENT

*Log each notification and follow up if you don't hear back within 2 weeks.*

| ORGANISATION | DATE SENT | RESPONSE RECEIVED? | FOLLOW-UP NEEDED? |
|--------------|-----------|--------------------|-------------------|
|--------------|-----------|--------------------|-------------------|

# Your Notification Templates (cont.)

| ORGANISATION | DATE SENT | RESPONSE RECEIVED? | FOLLOW-UP NEEDED? |
|--------------|-----------|--------------------|-------------------|
|--------------|-----------|--------------------|-------------------|

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