

# Death Certificate & Post-Death Documents

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This section is for your executor to complete after your death.

When someone dies, there are documents that need to be obtained and stored. The most important is the death certificate.

This section provides a place to keep copies of these documents organised and accessible.

For your executor:

After a death, you'll need to obtain several documents. Keep copies here for easy reference.

What documents to store here:

Medical Certificate of Cause of Death. Issued by a doctor or hospital. Required to register the death.

Death Certificate. Issued by Births, Deaths and Marriages after the death is registered. You'll usually need several certified copies, with the right number depending on how many banks, funds and other organisations the estate has to deal with. Your funeral director or solicitor can help you judge how many to order.

Grant of Probate. Issued by the Supreme Court in your state or territory. Where it is needed, it confirms your legal authority to administer the estate. Not every estate needs probate, and the rules vary by state, so check with a solicitor whether yours does.

Letters of Administration. If there is no Will, the person handling the estate generally applies for Letters of Administration instead of a Grant of Probate. The rules on who can apply vary by state, so it is worth checking with a solicitor.

Final Tax Return. Once lodged and cleared by the ATO.

Confirmation the estate's tax affairs are in order. Before distributing, most executors check with the ATO (or the estate's accountant) that all returns are lodged and any tax is paid. The exact steps vary, so

it is worth getting advice from an accountant or solicitor on what your estate needs.

**Final Estate Accounts.** A summary of all assets, debts, expenses, and distributions. Executors can be personally liable if the estate is distributed before debts or claims are properly handled, so most people have a solicitor or accountant help prepare these and confirm it's safe to distribute.

How to use this section:

Attach copies of these documents as you receive them. Keep the originals in a safe place. These copies will be a quick reference when you need to check dates, details, or information.

Space for post-death documents

# Your Death Certificate & Post-Death Documents

*For your executor: a record of the official paperwork after death.*

## DEATH REGISTRATION DETAILS

DATE OF DEATH

PLACE OF DEATH

MEDICAL CERTIFICATE (ATTACHED / STORED AT)

REGISTERED WITH (BDM STATE)

DATE REGISTERED

REGISTRATION NUMBER

## DEATH CERTIFICATES OBTAINED

NUMBER OF CERTIFIED COPIES

CERTIFICATE NUMBERS

WHERE ORIGINALS ARE STORED

COPIES SENT TO (TRACK DISTRIBUTION)

## GRANT OF PROBATE / LETTERS OF ADMINISTRATION

PROBATE / ADMINISTRATION / NOT REQUIRED

DATE APPLIED

COURT

GRANT NUMBER

DATE GRANTED

WHERE ORIGINAL IS STORED

## Your Death Certificate & Post-Death Documents (cont.)

### SOLICITOR HANDLING PROBATE

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NAME

FIRM

PHONE

EMAIL

### FINAL TAX & ESTATE ACCOUNTS

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FINAL TAX RETURN LODGED (DATE)

ATO CLEARANCE OBTAINED

FINAL ESTATE ACCOUNTS PREPARED

ESTATE BANK ACCOUNT CLOSED

### ESTATE CLOSURE & DOCUMENT STORAGE

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DATE ESTATE FINALISED

WHERE ESTATE RECORDS ARE STORED

NOTES: ANYTHING ELSE ABOUT POST-DEATH DOCUMENTS