

PENNEY BLAIKIE LAW - *Deceased Estate Form*

Please take time to complete all relevant sections.

We understand we ask for a lot of information, but please be assured this will help us to help you with the Estate Administration.

Details of Deceased:

Deceased Full Legal Name:

Previously known names:

Occupation

Address:

Post Code:

Did the deceased leave a Will? Yes No If yes, who holds the Will:

Date of Death:

Is there a Death certificate? Please provide us with a copy:

Relationship Status: Single De Facto Married Divorced Widow/Widower Number of Years

Number of Biological children : Any children Whangai/Adopted in, if yes how many:

Any children adopted out? if yes how many: Any step children? if yes how many:

Did the deceased own property? If yes, provide the address:

Bank Accounts and Approximate Amounts:

Who holds kiwisaver funds? Approximate amount:

Name of Funeral services used:

Any additional information you would like to add:

Please provide the following documents for us to take a copy if you have them:

- *Deceased's Drivers Licence, Birth Certificate or Passport*
- *Death Certificate*
- *Deceased's Insurance policy*
- *Deceased's Bank Account details*
- *Deceased's rates certificates for any property owned*

You can drop documents off into the office or email them through to us at admin@pblaw.co.nz

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Applicant/Executor Details:

Full name:

Date of Birth:

Address:

Post Code:

Best Contact Number:

Email Address:

Occupation:

Employer:

Do you have a will?

If yes, who holds your will:

Relationship to the deceased: Executor

Surviving Spouse

Child

Parent

Sibling

Other

Did you attend the Tangi/Funeral?

When we make application to the High court, would you like to **Affirm** or **Swear** in the Affidavit?

Any Additional information or concerns you would like to add:

I instruct Penney Blaikie Law on the above matter and have been advised that the Terms of Engagement are available at their webpage or I have a copy. I authorise: deduction of fees and costs from the Penney Blaikie Law Trust Account in relation to my matters.

Signed:

Date:

Please provide original documents to the office as soon as possible. We are obligated to obtain information from you to meet government imposed legal requirements – AML

1. *Current Photo ID (Passport or Firearms Licence OR Driver Licence with one other Govt/Bank ID) &*
2. *Proof of Address (rates demand, IRD, MSD, Bank or power/telephone bill) less than 3 months*
3. *Bank account details if we are depositing money or account name & number (A verified document from your bank)*