



# Consent by a Beneficiary/Executor/Next-of-Kin

## Purpose of this form

For beneficiaries, immediate next-of-kin, executor(s)/administrator(s) to authorise the Bank to release assets from the estate to a claimant.

If you would like support with completing this form, please call us on 1800 868 153, Monday to Friday 8.30am to 6.30pm (Sydney time), option 2 for existing cases or visit a branch.



## What you need to know and do

- A separate form must be completed by each person giving consent to release assets from the estate.
- All copies of documents must be certified. Please note, if you have given these documents to us previously (including your identification documents), you do not have to supply them again. Simply let us know which documents you have previously provided in the Notes section at the end of this form.
- Privacy Notice – we collect your name, contact and other details to confirm your identity and to support the finalisation of the deceased customer’s estate. More information about how we collect and handle your personal information, including how you can access your personal information or make a complaint, is available in our Group Privacy Statement at [commbank.com.au/privacy](http://commbank.com.au/privacy)

## Section 1 – Deceased customer’s details

Deceased’s full name

To help us with identification, please provide additional details via one of the following options:

- Option 1** ▶ Provide a file reference number
- Option 2** ▶ Provide CBA BSB and account number, if known

## Section 2 – Consenter’s details

I, (full name(s) of consenter)

Other names known by (if any)	Date of birth	Best contact number
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Residential address (PO Box is not acceptable)

	State	Postcode

Email address

I am the:	Spouse (wife/husband)	Parent (mother/father)	Child (over 18)
	De Facto Relationship/ Domestic Partner	Sibling (brother/sister)	Other

of the deceased and hereby request the Commonwealth Bank of Australia (CBA) to release the funds from the deceased’s estate to the person or persons named on the Authority to Release Assets form(s) (002-805) and their receipt shall constitute a full discharge for the said assets.

Signature of person providing consent      Date (DD/MM/YYYY)

X

### Section 3 – Your Identification (this is a Government requirement)

To satisfy Government Regulations it is necessary for the Bank to identify you by sighting direct evidence for your identity. Select one of the following options, this will be used to confirm your identity.

- Option 1** ▶ Provide an existing CBA BSB and account number:
- Option 2** ▶ Provide this form along with acceptable identification documents to staff at a CBA branch for certifying (or you have previously provided identification details and had a customer profile created in branch as part of this process)
- Option 3** ▶ Provide (or have previously provided) a “Certified Copies Identification” form, along with certified copies of your identification document.

### Notes

### Bank use only

#### Customer Identification Verification

If the Consenter has an existing CommSee profile ensure their identification and signature are up to date (if they are not, follow the KYC refresh process) and ensure a BSB and Account Number or the Customer Identification Number is captured in Section 3 of this form (under option 1).

If a profile does not exist, and the Consenter has also not provided a Certified Copies Identification form, capture the identification details below:



#### Please Note:

This form and any other documents provided must be imaged onto the deceased customer's profile under: **Category "Deceased Estates", Types "Documents", Comments "Deceased"** using one cover sheet. The customer facing team member collecting them must certify all documents.

Document type	Document number	Name on document	Place of issue	Issue date (DD/MM/YYYY)	Expiry date (MM/YY)

Verification has been performed for the customer

Full name, and Date of birth, or Residential address

Bank Officer's name

Bank Officer's signature

Date (DD/MM/YYYY)