

Deceased Estate Requirements

Joint Holding - Checklist

	Originally certified copy of the Death Certificate
	Request for Transmission – Surviving Joint Holder(s) form

Notes:

Joint holdings – are held as joint tenants. The *Corporations Act 2001* recognises only the surviving joint holder as being entitled to the deceased securityholder's interest in the securities.

Definitions

Death Certificate - A legal document issued by the Registrar of Births, Deaths and Marriages. This is not the same as a 'Medical Certificate as to the Cause of Death', which is not acceptable as a supporting document.

Request for Transmission – Surviving Joint Holder form – The form used to transmit the securities to the surviving joint holder(s) only.

Originally Certified Copy – is a copy of the original document certified to be a true and correct copy of the original by an authorised person who can witness a Statutory Declaration such as a Justice of the Peace, Chartered Accountant, Police officer etc. A full signatory list of persons who can certify documents can be found at www.ag.gov.au/statdec.
