

# Deceased Notification Form

**Notification of a Deceased Customer will be accepted prior to providing this form and required documents. Please contact our Customer Support team on 07 3135 3525 (Mon-Fri 9am-5pm AEST) to advise us of a Deceased Customer.**

To allow us to best assist you, please complete the required sections to the best of your ability. If you are unable to provide certain details or documents at this time, please leave this space empty and we will contact you prior to finalisation of the accounts held in the name of the Estate.

If you require assistance completing this form or help with other matters relating to the management of the accounts held in the name of the Estate, please attend a Suncorp Bank Branch or contact our Customer Support Team.

Please send this completed form to Customer Support via email [DeceasedEstates@suncorpbank.com.au](mailto:DeceasedEstates@suncorpbank.com.au) or via post to GPO Box 2432, BRISBANE QLD 4001.

## 1. Deceased Customer Details

Title	<input type="text"/>		
Surname	<input type="text"/>		
Given name(s)	<input type="text"/>		
Residential Address (PO Box not acceptable)	<input type="text"/>		
	State	Postcode	
Date of birth	<input type="text" value="DD / MM / YYYY"/>	Date of death	<input type="text" value="DD / MM / YYYY"/>
Account No. (if known)	<input type="text"/>	Card No. first four and last four digits (if known)	<input type="text"/>

## 2. Notifying Party (Your) Details

Title	<input type="text"/>		
Surname	<input type="text"/>		
Given name(s)	<input type="text"/>		
Residential Address or Postal Address	<input type="text"/>		
	State	Postcode	
Daytime number	<input type="text" value="( )"/>	Email	<input type="text"/>
Are you an existing Suncorp Bank customer? <input type="checkbox"/> No <input type="checkbox"/> Yes If yes, please record your Account No. <input type="text"/>			
Relationship to Deceased		<input type="text"/> E.g Executor, Administrator, Next of Kin, Solicitor and Other	

Does the Estate hold any of the following? ☐ Will ☐ Letters of Administration ☐ Grant of Probate

## 3. Post or Email Consent

Please tick your preferred method of contact  
☐ Post ☐ Email. If email, please complete the following email consent information below

### Individual Executors/Net of Kin/Administrator

I/We, Executor(s)/Administrator(s) of the Estate of  consent to Suncorp Bank providing me/us with bank statements and other confidential information as necessary in relation to the Deceased's acconts and facilities held with Suncorp Bank via email. Suncorp Bank will use the nominated email address/s and I/we acknowledge that it is my/our responsibility to ensure the nominated email address/s is/are secure and confidential.

There is no guarantee that an email sent to us or by us will be secure, virus free, or successfully delivered. I/We acknowledge and accept that Suncorp Bank is not liable if due to circumstances beyond its control, messages sent to the nominated address are intercepted, delayed or corrupted or received by someone else. I/We agree to indemnify Suncorp Bank against any damages or losses suffered as a result of an unauthorised party receiving and/or intercepting any such emailed documents. I/We consent to Suncorp Bank using the following email address/s:

### Consent and email address/s from authorised parties

#### Executor/Claimant 1

Email	<input type="text"/>		
Name	<input type="text"/>	Signature:	<input type="text"/>

#### Executor/Claimant 2

Email	<input type="text"/>		
Name	<input type="text"/>	Signature:	<input type="text"/>

## 4. Proof of Identity

Under the Anti-Money laundering and Counter Terrorism Financing Act 2006, all applicants must provide acceptable identification to establish and verify their identity. Suncorp Bank reserves the right to request additional information to satisfy our requirements. **Full Name, Address and Date of Birth, where shown on any identification document, must be in English.**

If you are not a past or current Suncorp Bank customer you may be required to have your identification verified over the phone or in Branch. A list of acceptable Proof of Identity documents are provided in Proof of Identity.

## Privacy Statement

Reference to 'we', 'our', 'us' or 'Suncorp Bank' in this statement shall be a reference to and include Suncorp Bank (Norfina Limited ABN 66 010 831 722).

### Privacy is Important...

...especially when you consider the number of ways we communicate and interact these days. That's why we've put together this statement. It explains how we collect, hold, use and disclose your personal information and who we share it with.

And because it's guided by privacy laws, you can be sure it takes your rights seriously.

Above all, this statement is your assurance that we never take your privacy for granted and that we take the utmost care in protecting your personal information.

Suncorp Bank and its subsidiaries were recently acquired by Australia and New Zealand Banking Group Limited (**ANZ**). Suncorp Bank is no longer owned by Suncorp Group Limited and is no longer part of the group of companies owned by Suncorp Group Limited (**Suncorp Group**).

### Why do we collect personal information?

Personal information is information or an opinion about an identified individual or an individual who is reasonably identifiable. Suncorp Bank collects personal information so that we can:

- identify you and conduct appropriate checks;
- establish your tax status under any Australian or foreign legislation, regulation or treaty or pursuant to an agreement with any tax authority;
- comply with relevant laws, regulations, codes of practice and external payment systems;
- understand your requirements and provide you with a product or service;
- set up, administer and manage our products and services;
- manage, train and develop our employees and representatives;
- communicate with you, manage complaints and disputes, and deal with dispute resolution bodies;
- identify, prevent or investigate any potential fraud, unauthorized use or criminal activity and/or protect our legitimate interests;
- conduct and perform marketing and promotional activities, including telling you about products or services that may be of interest to you, informing you of special events or offers, or running competitions, promotions events and programs; and
- get a better understanding of you, your needs, your behaviours and how you interact with us, so we can engage in product and service research, development and business strategy including managing the delivery of our services and products via the ways we communicate with you.

Your telephone calls and conversations with a customer service representative may be recorded and monitored for quality, training and verification purposes.

### What happens if you don't give us your personal information?

If we ask for your personal information and you don't give it to us, we may not be able to provide you with any, some, or all of the features of our products or services.

### How we handle your personal information

We collect your personal information directly from you and, in some cases, from other people or organisations. We also provide your personal information to other related entities or affiliates of Suncorp Bank, including ANZ and its related entities (ANZ Group). Those entities may disclose or use your personal information for the purposes described in 'Why do we collect personal information?' in relation to products and services they may provide to you.

Some Australian laws may authorise or require us to collect or disclose your personal information, including Anti-Money Laundering and Counter-Terrorism Financing Act; Income Tax Assessment Acts, Tax Administration Act and A New Tax System (Goods and Services Tax) Act, and any regulations made under those Acts.

We will use and disclose your personal information for the purposes we collected it as well as purposes that are related, where a user of our products would reasonably expect us to or where another exception applies under the Privacy Act. We may disclose your personal information to and/or collect your personal information from:

- related entities of Suncorp Bank, including entities within the ANZ Group;
- Suncorp Group members, who provide us with certain back-office services (as described in our Privacy Policy);
- any entity where disclosure to, or collection from, such entity is required or authorised by law;
- customer, product, business or strategic research and development organisations;
- data warehouse, strategic learning organisations, data partners, analytic consultants;
- social media and other virtual communities and networks where people create, share or exchange information;
- publicly available sources of information;
- clubs, associations, member loyalty or rewards programs and other industry relevant organisations;
- a third party contracted to provide financial services, financial products or administrative services by us, one of our subsidiaries, or an entity in the ANZ Group. For example; information technology providers, administration or business management services, consultancy firms, auditors and business management consultants, marketing agencies and other marketing service providers, and print/mail/digital/imaging/document management service providers;
- yours or our advisers, agents, representatives or consultants;
- government, statutory or regulatory bodies and enforcement bodies;
- the Australian Financial Complaints Authority or any other external dispute resolution body;
- manufacturers for plastic card production (eg debit cards); and
- any other organisation or person, where you've asked them to provide your personal information to us or asked us to obtain personal information from them, e.g. your mother.

We'll use a variety of methods to collect your personal information from, and disclose your personal information to, these persons and organisations, including written forms, telephone calls and via electronic delivery. We may collect and disclose your personal information to these persons and organisations during the course of us providing our products and services to you, regularly, or on an ad hoc basis, depending on the purpose of collection.

### Overseas Disclosure

Sometimes, we need to provide your personal information to – or get personal information about you from – persons located overseas, for the same purposes as in 'Why do we collect personal information?'

The list of countries Suncorp Bank usually disclose personal information to can be accessed through our Privacy Policy. Please go to [www.suncorpbank.com.au/about-us/legal/privacy.html](http://www.suncorpbank.com.au/about-us/legal/privacy.html) to see our Privacy Policy or call 13 11 75.

From time to time, we may need to disclose your personal information to, and collect your personal information from, other countries not on this list. Nevertheless, we will always disclose and collect your personal information in accordance with privacy laws.

### Your personal information and our marketing practices

Every now and then, we and any related entities or affiliates might let you know – including via mail, SMS, email, telephone or online – about news, special offers, products and services that you might be interested in. We will engage in marketing unless you tell us otherwise. You can contact us to update your marketing preferences at any time using the details in the "Contact Us" section below.

In order to carry out our direct marketing we collect your personal information from and disclose it to others that provide us with specialised data matching, trending or analytical services, as well as

general marketing services (you can see the full list of persons and organisations under 'How we handle your personal information'). We may also collect your personal information for marketing through competitions and by purchasing contact lists.

We, and other people who provide us with services, may combine the personal information collected from you or others, with the information we, or related entities, or our service providers already hold about you. We may use online targeted marketing, data and audience matching and market segmentation to improve advertising relevance to you.

#### **Our Policies**

This Privacy Statement should be read in conjunction with our Privacy Policy. You can obtain a copy of our Privacy Policy. Please use the contact details in the "Contact Us" section if you wish to do so.

We encourage you to review and check our websites regularly for any updates to our Policies.

#### **How to access and correct your personal information or make a complaint**

You have the right to access and correct your personal information held by us and you can find information about how to do this in our Privacy Policy.

The Policy also includes information about how you can complain about a breach of the Australian Privacy Principles and how we'll deal with such a complaint.

#### **Contact us**

For more information about our privacy practices including overseas disclosure or to tell us about your marketing preferences you can visit: [www.suncorpbank.com.au/about-us/legal/privacy.html](http://www.suncorpbank.com.au/about-us/legal/privacy.html).

Alternatively, you can get in touch directly by contacting us on:

- Phone: 13 11 75
- Email: [privacyaccessrequests@suncorpbank.com.au](mailto:privacyaccessrequests@suncorpbank.com.au)
- Mail: Suncorp Bank GPO Box 2432, Brisbane Qld 4001
- or by visiting a Suncorp Bank Branch.