



Deceased Estate Representative Form

We're here to support you through this challenging time so you can focus on the things that matter most. It's important to us to work with you to ensure your loved one's accounts remain protected and safe.

The purpose of this form is for the Deceased Estate Representative(s) to allow us to make payments in relation to a funeral or estate expenses, and settle the estate.

PART A: Details of Deceased

Full name

Date of Birth / /

Date of Death / /

Customer number or account number (if known)

Does a Will exist? Yes No

PART B: Deceased Estate Representative Details

To verify the Deceased Estate Representative's (this may be an Executor/Administrator, Next of Kin, State Trustee or Legal Representative) entitlement to act for the estate we will require documentation as outlined in the Loss of a Loved One Support Guide available on our website or from a branch.

Representative 1

Full name

Customer number or account number

If you're not a customer

Residential address

Date of Birth / /

Phone

Email

ID provided or attached Yes No

Deceased Estate Representative Executor/Administrator Next of Kin Legal Representative Trustee

Nominated as Primary Contact Yes No



Member Communications

Annual Reports

You may elect to receive Newcastle Greater Mutual Group Ltd (NGM Group) Annual Reports and/or notice of meetings within 21 days of this notice. If you do not make an election within 21 days we are not required to provide you with Annual Reports or notice of meetings, but you may change your mind at any time.

I/We elect to receive NGM Group Annual Reports: Yes No

I/We elect to receive notice of NGM Group meetings: Yes No

Annual Reports set out the following information:

- The financial position and performance of NGM Group; and
- The efficiency with which NGM Group is managed; and
- The financial risks to which NGM Group is exposed.

Notice of Meetings informs members about matters in relation to which they may wish to attend a meeting. A member of NGM Group who is entitled to attend, and cast a vote at, a meeting may appoint a proxy to attend and vote on your behalf at the meeting.

Attendance at the Annual General Meeting, and other meetings of members, of NGM Group enables the members to:

- Participate in the governance of NGM Group; and
- Ask questions about, and comment on, the management of NGM Group, its financial standing and performance; and
- Ask the auditor of NGM Group questions about the conduct of the audit of the body corporate and the preparation and content of the auditor's report; and
- Vote on any proposal to amend the constitution of NGM Group or on any other matter in relation to the management of NGM Group.

Changing your mind

You may change your mind at any time to receive or not receive notice of meetings and Annual Reports by contacting us on 13 19 87. If you have elected to receive Notice of meetings and Annual Reports, they will be sent by electronic means. You can choose to receive your communications by paper instead at any time by contacting us.

PART F: Privacy Consent and Notification

I have received and understood the Privacy Consent and Notification available at newcastlepermanent.com.au/privacy-notice or upon request, and I consent to the use and disclosure of my personal information as stated in the Privacy Consent and Notification and the NGM Group Privacy and Credit Reporting Policy.

Please note we may not be able to process your application for products and services or provide you with an appropriate level of service if you do not consent to the use and disclosure of your personal information as set out in our Privacy and Credit Reporting Policy. To opt out of direct marketing, call 13 19 87 or visit a branch.

PART G: Indemnity

- I/We indemnify NGM Group against any actions or claims which may be made by any person for this money.
- Without production of a Grant of Probate of the Will/Letters of Administration of the estate, I/we
 - indemnify and will continue to indemnify NGM Group against all actions, claims, demands or suits that may be brought or made against it and also against all charges, costs, expenses or losses that it may incur or for which it may be liable in respect of the amount/s standing to the credit of the Deceased account/s;
 - will pay and discharge any debts in the estate of the deceased and then in accordance with the Will or Grant of Probate/Letter of Administration; and
 - will protect NGM Group from any claim or proceedings against NGM Group in relation to the credit balance.
- I/We indemnify NGM Group against any actions or claims which may be made by any person for this money.



PART H: Deceased Estate Representative Authority

Full name	Signature
1.	
2.	
3.	
4.	

If you require any help in relation to the estate, please contact our Estates Management Team:

Phone: 02 4927 4422
Monday to Friday 9:00am to 5:00pm (AEST/AEDT)

Email: deceased.estates@ngmgroup.com.au

Post: Estate Management Team, PO Box 5001, HRMC, NSW 2310

In person: at a branch