



## PREPARATION FOR LETTERS OF ADMINISTRATION (LOA) APPOINTMENT

Thank you for making an appointment with Citizens Advice Bureau (CAB) for assistance with an LOA application.

### What you can expect

Your application for LOA is a complex application and therefore the purpose of your first meeting is to establish how we may be able to assist you.

If we are able to assist, we will advise you on the best options for making an application, or alternatively will refer you to the Law Society to find a private solicitor to assist you.

You will be charged **\$50.00** (\$40.00 with eligible concession card) for a 20 minute appointment. If you do not attend your appointment and fail to cancel it beforehand you will be charged for the appointment.

### Initial check

- Did the deceased have a Will?
- If not, what checks have been carried out to establish that there is no Will – have you checked the deceased's personal possessions, financial institute's safe deposit box, talked to family members, the deceased's lawyers/accountants (if any) and contacted the Will Bank/Perpetual Trustee?
- Have you got a copy of the deceased death certificate? The death certificate can be a final death certificate or an interim one issued if the death is subject to coronial inquest.
- Have you gathered all relevant information of the **assets and liabilities** of the deceased as **on the day the deceased died, NOT what are the financial details now?**

### Documents to bring to your appointment

- Original death certificate;
- Certificate of title for any real property the deceased may have owned;
- Bank account names, numbers and balances **on the date of death**;
- Share details (company name, number of shares, where registered and value);
- Superannuation details;
- Full details of any debts or unpaid bills the deceased had **on the day of death**
- Details of other assets and/or liabilities of the deceased, and their values **on the day of death**.

### Identification Documents

**Photo ID** -For your appointment you **must** bring with you a document with your photograph – it can be your driver's licence, proof of identity document, your passport or other photo ID.

**No Photo ID** - If you do not have any one of the above documents, you **must** bring with you a document showing your name and signature.