



PREPARATION FOR PROBATE APPOINTMENT

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

What you can expect

Your application for Probate may be a simple or complex application. Therefore the purpose of your first meeting is to establish the type of application yours will be. Your solicitor will advise you how we can assist, or alternatively will refer you to the Law Society to find a private solicitor to assist you. If we are able to assist, we will advise you on the best options for completing your Probate application.

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

- Do you have the original Will? - Has a check been made for later Wills?
- Is the Will dated? - Are there two witnesses, and all pages signed?

Witnesses to the Will

As part of your application for Probate you will need to find the current residential addresses of the witnesses to the Will or demonstrate your attempts to contact them.

Has contact made with the witnesses?

If the whereabouts of the witnesses are unknown, the following searches must be done - White Pages, Electoral Commission and Cemetery Board.

Documents to bring to your appointment

- Original Will and codicils if any (a codicil is a later amendment to the Will)
- Original death certificate, or an interim death certificate if the death is subject to a coronial inquest
- Certificate of title for any real property the deceased may have owned;
- Bank account names, numbers and balances **on the day they died**;
- Share details (company name, number of shares, where registered and value **on the day they died**);
- Superannuation details
- Details of other assets and/or debts/ liabilities/unpaid bills of the deceased, and their values **on the day they died**;

Identification Documents

- **Photo ID** -For your appointment you **must** bring with you a document with your photograph such as your driver's licence, proof of identity document, your passport or other photo ID.
- **No Photo ID** - If you do not have any of the above documents, you **must** bring with you a document showing your name and signature.