



GUIDE NOTES

This form should be used by the Executor of the will, or the Administrator of the estate where the deceased left no will, to apply for the payment of any pension, allowance or benefit which was payable before, or has been approved for payment, since the death of the beneficiary.

You must attach the original (or certified copies) of the will, probate or letters of administration to this form. If any documents are not immediately available, they must be forwarded as soon as possible as payment cannot proceed without them. Please note that any original documents forwarded with this form will be returned by certified mail.

The information provided on this form is not usually disclosed to any other body or agency or to any individual outside this agency.

The legislation

The objects of the legislation are to ensure the timely payment of the moneys in accordance with the deceased's will. Where payment cannot be made in accordance with the will - or where no will exists - to ensure payment of those moneys is uniform throughout Australia.

To ensure that beneficiaries of a will are protected against any possible future claim, payments of more than \$40,000 will not be made without probate of the will having been obtained or letters of administration with the will annexed* having been granted.

* Letters of Administration with the will annexed - these are granted when there is a will, but no available executor and someone else, usually a beneficiary, applies to administer the will.

Possible beneficiaries - *(only relevant where there is no will, or where there is a will and probate is not obtained, or letters of administration with the will annexed is not obtained).*

Payment is to be made to the first group of eligible beneficiaries that can be identified. The order to be considered is: spouse - including de facto, child(ren)*; parent(s) and sibling(s)* e.g. sister, half-brother. Only those people in the first relevant group need to be listed at "**Possible Beneficiaries**" section of the form.

* If a child or sibling would have been eligible but has passed away, any children of those beneficiaries should be listed. This should be indicated by including the child or sibling's name, date of death and any children of them in brackets immediately following.

If you need help with this form, or if you want more information about this matter, please contact the Department on the following numbers:

City residents **133 254**

Country residents **1800 555 254**

Privacy notice

Your personal information is protected by law, including the *Privacy Act 1988*. Your personal information may be collected by the Department of Veterans' Affairs (DVA) for the delivery of government programs for war veterans, members of the Australian Defence Force, members of the Australian Federal Police and their dependants.

[Read more: How DVA manages personal information](#)