

Deceased Estate Notification

For notification, redemption or transfer of accounts, we require the following to be sent to us (Estates@heartland.co.nz) direct from the solicitor or Executor:

- If the value of the estate is under \$40,000, a certified copy of the death certificate and will OR,
- If the value of the estate is over \$40,000, a certified copy of Probate or Letters of Administration
- Original or certified copy of a Death Certificate
- An original Deceased Estate Declaration & Claim/Indemnity Form
- Original or certified copy of identification for all executors/administrators
- Proof of bank account numbers if payments are being made to an alternative bank account

*Instructions for the Solicitor/Executor forwarding the above documentation. Please include full Estate name only in email subject line.

If you have any further queries, please do not hesitate to contact us.

Yours sincerely,

Estates Team

HEARTLAND BANK

E Estates@heartland.co.nz

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