



Deceased Estate Withdrawal

Complete this form to close the BWA Cash Management Trust account of a deceased estate and/or transfer funds to a new BWA Cash Management Trust account or to a beneficiary.

1. CLIENT SERVICES

Please post this form to: BWA Managed Investments
GPO Box 2515
Perth WA 6001

2. CASH MANAGEMENT TRUST ACCOUNT

Please provide the deceased estate CMT Account details. Please Note: Supporting documentation is required. Contact the Client Services Team for further information.

CMT Account Name

BSB

CMT Account Number

3. CONTACT INFORMATION

Please provide your contact details.

Name

Telephone Number

4. WITHDRAWAL INFORMATION

Is this a full withdrawal?

No

If No, please state amount

\$

Yes

If Yes, would you like to close this account?

Yes

No

5. BANK TRANSFER INFORMATION

Please complete this section to make a bank transfer.

Bank building society or credit union name

Branch Address

BSB and Account Number

Account Name

6. CHEQUE INFORMATION

Please complete this section to draw a bank cheque(s). Normal fees will apply.

Payable to

1.

\$

2.

\$

3.

\$

Please Note: 'Not Negotiable' bank cheques drawn will be sent to the Estate's mailing address.

7. SPECIAL INSTRUCTIONS

8. EXECUTOR(S)/SIGNATURE(S)

Name/CMT Account Signatory 1/executor*

Name/CMT Account Signatory 2/executor*

Signature/CMT Account Signatory 1/executor*

X

Signature/CMT Account Signatory 2/executor*

X

Date

□□	/	□□	/	□□	□□
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Date

□□	/	□□	/	□□	□□
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*Delete as applicable.

9. CERTIFICATION

I,

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hereby certify that the above signatures as indicated are those of executor(s) of the estate/late

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Signature/Solicitor/Justice of the Peace

X

If you need help completing this form please contact our Client Services Team

Client Services: 1300 663 117

Email: support@bwami.com.au

Office Use Only	Signature verified:	Entered by:	Staff No:	Date entered:
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