# **Things to know before completing this form.**

This form is for a small estate application using the Probate Office’s optional service. This service helps prepare your application for a grant of letters of administration (no will).

Before completing this form, please [read the information about small estate applications](https://www.supremecourt.vic.gov.au/wills-and-probate/support/small-estates) on the Supreme Court Website.

You can use this service if:

* the estate is under the small estate limit, and
* the application is simple, and
* you are the next of kin who is entitled to share in the estate.

There are no other strict eligibility rules, but the estate must be small and the application must be simple.

After you send the form, the Probate Office will let you know if they can help.

If the small estates optional service is not suitable for your situation, you can still prepare the application yourself. There is a [step-by-step guide on the Supreme Court of Victoria website](https://www.supremecourt.vic.gov.au/wills-and-probate/how-to-apply-for-a-grant-of-probate-or-administration) to help you through the process, and the Probate Office can provide procedural guidance if needed.

There is a fee to use the small estates optional service.

Preparing the application yourself will help you save money.

If you need a paper copy of the form, call the Probate Office on (03) 8600 2006.

#### What you need to complete this form

## To complete the small estate application form, you will need:

## a certified copy of the death certificate, and

## a list of the deceased person’s assets and debts (For example, bank accounts, property, loans).

You will also need to complete the [small estate credit card authorisation](https://www.supremecourt.vic.gov.au/wills-and-probate/probate-forms/probate-office-small-estates-no-will-forms) form to pay the fee.

What to do after completing the forms

Once you’ve completed the application form and the credit card authorisation form, send them along with a certified copy of the death certificate:

**By email:** Send to: smallestates@supcourt.vic.gov.au.

**By post:** Send to: Registrar of Probates,

Supreme Court of Victoria,

PO Box 13331,

Law Courts, VICTORIA, 8010.

# **Section 1 - Your details**

|  |  |
| --- | --- |
| Surname: |  |
| First name: |  |
| Middle name (s): (leave blank if none) |  |
| Address: (include street, suburb, state, and postcode) |  |
| Email address: |  |
| Phone number: |  |
| Occupation: (your current or most recent job if you have one) |  |

**Confirm you are the right person to make this application by ticking the box below:**

[ ]  The person who died did not leave a will, and I am the next of kin who is entitled to share in the estate (you can [answer a few questions on our website](https://www.supremecourt.vic.gov.au/wills-and-probate/help-with-probate-office-processes/who-is-entitled-to-share-in-a-deceaseds-estate) to check who is entitled).

# **Section 2 – Deceased’s details**

|  |  |
| --- | --- |
| Surname: |  |
| First name: |  |
| Middle name (s): (leave blank if none) |  |
| Last residential address: (include street, suburb, state, and postcode) |  |
| Last known occupation:  |  |
| Date of death:  |  |

# **Was the person who died living or domiciled in Victoria when they passed away?**

# YES [ ]  NO [ ]

To be considered domiciled in Victoria, the person must have intended Victoria to be their permanent home. If the person was not domiciled in Victoria, the small estate optional service may not be able to assist. Please contact the Probate Office to discuss your application.

# **Section 3 – Relationship details**

|  |  |
| --- | --- |
| Your relationship to the person who died: (For example, spouse, child, parent, sibling) |  |

**Marital status of the person who died**

Please tick one box:

[ ]  Married

[ ]  Never married

[ ]  Divorced

[ ]  Widowed

If the person was divorced, please provide the date the divorce was finalised by the court:

|  |  |
| --- | --- |
| Date of divorce: |  |

*Note: This is the date the divorce was legally completed, not the date the person died.*

The small estates optional service may only assist if you know the full date of divorce.

**Was the person in a domestic or caring relationship when they died?**

*A domestic partner is someone who lived with the person as a couple, but was not married to them.*

*A spouse is not a domestic partner or registered caring partner.*

**Even if you are the spouse of the person who died, you must answer this question by ticking one box below:**

[ ]  No domestic or registered caring partner

[ ]  Unregistered domestic partner

[ ]  Registered domestic partner

[ ]  Registered caring partner

If you ticked unregistered domestic partner, the small estates optional service cannot assist.

If you ticked registered domestic partner or registered caring partner you will need to provide a certified copy of the relationship certificate issued by Births, Deaths and Marriages Victoria.

Remember: If the small estates optional service cannot assist, you can still prepare the application yourself. There is a [step-by-step guide on the Supreme Court of Victoria website](https://www.supremecourt.vic.gov.au/wills-and-probate/how-to-apply-for-a-grant-of-probate-or-administration) to help you through the process.

# **Did the person who died have any children?**

# YES [ ]  NO [ ]

# **Section 3 – Relationship details (continued)**

**Are there other people who are legally entitled to share in the estate?**

You can [answer a few questions on our website](https://www.supremecourt.vic.gov.au/wills-and-probate/help-with-probate-office-processes/who-is-entitled-to-share-in-a-deceaseds-estate) to check who is legally entitled to share in the estate.

YES [ ]  NO [ ]  UNSURE [ ]

If you ticked Yes, please list their details below:

|  |  |
| --- | --- |
| **Name** | **Relationship** |
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Are all of the people listed above 18 years or older and able to manage their own affairs without help?

YES [ ]  NO [ ]

If you ticked No, the small estates optional service may not be able to assist. Please contact the Probate Office to discuss your application.

# **Section 4 – Deceased’s assets and liabilities**

**Did the person who died have any assets located in Victoria?**

YES [ ]  NO [ ]

If you ticked no, you may not be able to apply in Victoria. Please contact the Probate Office to discuss your options.

**Did the person who died hold any assets in a different name?**

YES [ ]  NO [ ]

If you ticked Yes, please provide the other name below:

|  |  |
| --- | --- |
| Surname: |  |
| First name: |  |
| Middle name (s): (leave blank if none) |  |

# **Section 4 – Deceased’s assets and liabilities (continued)**

**List of assets**

Please list all known assets of the person who died.

You must include the type, location, and value of each asset.

Only include:

* assets in the person’s sole name, or
* assets held as tenants in common

Do not include jointly owned assets.

Example:

|  |  |  |
| --- | --- | --- |
| **Type of asset** | **Details of asset** | **Value** |
| e.g. Bank account | ANZ, Melbourne CBD Branch, BSB 013456, Account 12345678 | $5,000 |
| e.g. Motor vehicle | 2018 Toyota Corolla, VIC registration ABC123 | $12,000 |
| e.g. Accommodation bond refund | Accommodation Nursing Home, 123 Fake Street, Melbourne VIC 3000 | $35,000 |

**Tip:** For each asset, include enough detail to identify it – such as the address, account number, or registration details.

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| --- | --- | --- |
| **Type of asset** | **Details of asset** | **Value** |
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# **Section 4 – Deceased’s assets and liabilities (continued)**

**List of liabilities**

Please list all known debts or liabilities the person had at the date of death.

Do not include funeral costs.

Example:

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| --- | --- | --- |
| **Type of liability** | **Details of liability** | **Value** |
| e.g. Credit card | NAB Visa, ending in 1234 | $2,000 |
| e.g. Mortgage | CBA, BSB 063-000, Account 98765432 | $50,000 |
| e.g. Household bill | ENERGY COMPANY PTY LTD | $500 |

**Tip:** For each liability include the name of the lender or provider, and any account or reference numbers if known.

|  |  |  |
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| **Type of liability** | **Details of liability** | **Value** |
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**Need help preparing the application yourself?**

If the small estates optional service cannot assist, you can still apply for a grant of letters of administration.

The Probate Office can provide procedural guidance to help you complete the application.

Visit the [step-by-step guide available on the Supreme Court of Victoria website](https://www.supremecourt.vic.gov.au/wills-and-probate/how-to-apply-for-a-grant-of-probate-or-administration) for more information.