Unclaimed money application form

QPT
QUEENSLAND PUBLIC TRUSTEE

Please note: This application will not be accepted unless it is completed in full, signed and witnessed in blue or black ink. To support your application you must provide evidence that you are the rightful owner of the unclaimed money/s for which you are applying. Print clearly in the boxes provided.

Unclaimed Money Register details (if you have more than three reference numbers, attach a list to your application)

Reference no. ☐☐☐☐☐☐☐☐ / ☐☐☐☐ Amount $ _____

Reference no. ☐☐☐☐☐☐☐☐ / ☐☐☐☐ Amount $ _____

Reference no. ☐☐☐☐☐☐☐☐ / ☐☐☐☐ Amount $ _____

Owner name _____ Postcode _____

Claim Type Tick as many boxes as are applicable to your claim/s

☐ Sole ☐ Joint (**each** claimant **must submit** an individual **unclaimed money application form** and provide supporting evidence)

☐ Deceased estate ☐ Company

Applicant's current details

Name _____ Date of birth _____

Home address _____ Postcode _____

Postal address _____ Postcode _____

Phone (home) _____ Phone (work) _____

Phone (mobile) _____ Email _____

▲ must be provided by all applicants

Applicant's nominated bank account details

Provide your Australian bank account details as per your bank statement or passbook.

[Do not provide your card number]

By providing bank account details you authorise QPT to credit your account.

Account ☐☐☐☐☐☐ – ☐☐☐☐☐☐☐☐

BSB number Account number

Account in name of _____

Bank _____ Branch _____

Indemnity and direction

I direct the Public Trustee of Queensland to pay to me the amount held by the Public Trustee of Queensland to the above bank account. In consideration of the payment, I hereby indemnify the Public Trustee of Queensland against all claims, actions, losses or damages that may arise in connection with, or arising from, the payment of the above amount to me.

Declaration: I do solemnly and sincerely declare that:

1. I am identical with the owner of unclaimed money referred to in this application
2. I have a connection to the last known address held by the Public Trustee of Queensland as is evidenced by the attached documents
3. I have a connection with the enterprise that paid the unclaimed money to the Public Trustee of Queensland as is evidenced by the attached documents
4. I have a lawful entitlement to claim the unclaimed money.

Signed: _____ Date: ____ / ____ / ____

Witnessed: _____ Date: ____ / ____ / ____ Name: _____

Justice of the Peace/Commissioner for Declarations/Legal Practitioner — Witness full name required

Note: The nominated qualified witness must reside in the same state as the origin of the supporting documentation and the applicant.

Your personal information is collected for the purposes of processing your claim in relation to the Unclaimed Money Register. Queensland Public Trustee (QPT) is committed to your privacy and your personal information will not be released to any person unless you authorise such action or the release of the information is required by law.

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Proof of identity and association

Copies of proof of identification documents and association documents sent to us with your application must be certified as a true and correct copy by a qualified witness.

The following people are qualified witnesses and are able to certify photocopies of documents:

In Australia

- Justice of the Peace
- Commissioner for Declarations
- Barrister, solicitor or Notary Public
  (or any other approved witness in your jurisdiction)

Outside Australia

- Notary Public
- Australian Embassy Officer
- Australian Consulate Officer

Where funds are held in more than one name, each party must complete a separate claim form and provide identification. For multiple register entries, only one application form and one set of identification and supporting documents are required to be submitted per person or company.

Section 1: Identification of person ☐ Attached

If the applicant's name differs to the name that is listed in the unclaimed register, we also require documented evidence of the applicant's name change/s. Such document/s must be official registry documentation and not a ceremonial certificate. QPT will conduct identity verification processes at its discretion, at no cost to the applicant.

You must provide **four forms of current identification**:

1. Photo identification:
This includes a certified copy of one of the following: driver licence, passport or Adult Proof of Age card.

2. Community identification:
This includes a certified copy of one of the following: Medicare card, birth certificate, bank card, student card, salary advice or payslip, Blue Card.

3. Current residential address evidence:
This may include a certified copy of utility bill or rates notice.

4. Bank account evidence:
This is a certified copy of a bank statement that includes the applicant's name and residential address, and matches the account details in the application.

Section 2: Proof of association ☐ Attached

All claims require two proofs of association evidence.

A proof of a connection to the organisation that sent the unclaimed money to QPT is required.

1. Provide a certified copy of a linking document demonstrating your connection to the unclaimed money.
2. Provide certified proof of the applicant's last known address held by the sender organisation.

Section 3: Deceased estates ☐ Attached

A separate completed application form together with certified identification documents must be provided by all executors or administrators. Proof of association documents described in **Section 2** are also required.

The following supporting documents will also be required:
A certified copy of the death certificate, a certified copy of the deceased's Will and where applicable, a certified copy of Grant of Probate or Letters of Administration.

If no Grant of Probate or Letters of Administration have been obtained, a Statutory Declaration confirming that no legal proceedings have commenced relating to the estate and that the executor does not intend to start any formal legal estate administration will need to be completed by all executors.

Please note: Depending on your claim, QPT may request that you obtain a Grant of Probate or Letters of Administration. Funds will be paid into bank account in the name of the estate or a cheque made out to the estate if there is no bank account.

Section 4: Companies ☐ Attached

Company applications for unclaimed money must be completed by at least two officers of the company (either two Directors or one Director and one Secretary for example). These are the people listed on the company record, held by Australian Securities & Investments Commission (ASIC) as either a CEO, Director or Secretary. Such person(s) must also satisfy the requirements of **Section 1** and **2** above in full.

You will also be required to provide a certified **Current Company Extract** or **Historical Company Extract** issued in the last 30 days from ASIC showing the Office Bearers (where applicable, the company seal should be affixed).

Section 5: Claims lodged by an agent (money finder) ☐ Attached

Where an agent (money finder) is making a claim on behalf of the owner of unclaimed money, a cover letter from the agent **and** the original signed agency authority must also be provided. Identification and supporting documents of the owner of the funds must also satisfy the requirements of Section 1 and 2 above in full.

IMPORTANT NOTICE

QPT will not pay any claim until a completed Unclaimed Money Application Form and all supporting documentation is received.

QPT reserves the right to call for additional supporting documentation.

Where an application is incomplete, QPT may contact the applicant to advise what additional documents are required. Applications will not progress until those additional documents are received by QPT.

Lodging your completed application:

Mail this application to: **Unclaimed Money**
Queensland Public Trustee
GPO Box 1449
Brisbane QLD 4001

OR deliver to any regional QPT office. Addresses can be found at: **www.pt.qld.gov.au/about-us/contact-us/locations**.

Your privacy

Queensland Public Trustee collects and manages personal information in the course of performing its activities, functions, and duties in accordance with the *Public Trustee Act 1978* (QLD). We respect the privacy of the personal information held by us. The way in which Queensland Public Trustee manages personal information is governed by the Information *Privacy Act 2009* (QLD).

This means there are restrictions on how we can use, and when we can disclose, your personal information. When you supply us with your personal information as part of providing us with feedback or lodging a complaint, we will generally use this information only to assist us to address your concerns. We generally do not disclose your personal information outside of Queensland Public Trustee unless we are required to do so by law or unless you have given us your consent to such disclosure. If you would like to read our Privacy Statement, visit our website at **www.pt.qld.gov.au**. Queensland Public Trustee is the business name of The Public Trustee of Queensland established under the *Public Trustee Act 1978* (Qld).