

Small Estate Application Form

Probate/Letters of Administration (with the Will annexed)



Things to know before completing this form.

A small estate application is when an applicant uses the Probate Office's **optional** service to assist them in applying for a grant of representation. The small estates optional service will only be available for **straight-forward** matters and is not available for more complex application types. The complexity of the application will be assessed on a case-by-case basis once the small estate application form has been completed and emailed to the Probate Office.

If the application is one which is deemed to be straight-forward, for a fee, the Probate Office will prepare the paperwork to apply for a grant of representation on the applicant's behalf, called the small estates optional service.

Before completing this form, you should read the information about small estate applications available on the [Supreme Court Website](#).

An estate is small if a person's assets at their date of death are below the value set by government. The current and previous values set by government are available on the [Supreme Court Website](#) or by contacting the Probate Office.

Contact the Probate Office by phone on (03) 8600 2006 if you need the Probate Office to send you a hard copy of this application form.

What you need to complete this form

You require the following to make a small estate application:

- a certified copy of the deceased's death certificate (if the death has been registered with Births, Deaths and Marriages Victoria after 11 July 2022, a certified copy of the "Death Certificate - Cause of Death" is required);
- the original will and original codicil(s) if any; and
- details and the location and address of all the assets and liabilities of the deceased (such as bank account details).

You will also need to complete a [small estate credit card authorisation](#) form to pay the fees, which is available on our website. You can phone the Probate Office on (03) 8600 2006 to request a hard copy of the form.

What to do once you have completed both the small estate application form and small estate credit card authorisation form

Once you have completed the small estate application form and the small estate credit card authorisation form, email them along with a copy of the will and any codicil(s) and a certified copy of the death certificate (if the death has been registered with Births, Deaths and Marriages Victoria after 11 July 2022, a certified copy of the "Death Certificate - Cause of Death" is required) to smallestates@supcourt.vic.gov.au.

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Alternatively, you can post the completed forms along with a certified copy of the death certificate (if the death has been registered with Births, Deaths and Marriages Victoria after 11 July 2022, a certified copy of the "Death Certificate - Cause of Death" is required) and the original will and codicil/(s) if any to:

Registrar of Probates,
Supreme Court of Victoria,
PO Box 13331,
Law Courts, VICTORIA, 8010.

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Section 1 - Your details

Surname:	
First name:	
Middle name (s):	
Address:	
Email address:	
Phone number:	
Occupation:	

How are you eligible to make this application? Please tick only one of the following options:

- I am the executor appointed in the will and/or codicil(s)
 I am a beneficiary named in the will and/or codicil(s), and no appointed executor(s) can apply.

Section 2 – Deceased's details

Surname:	
First Name:	
Middle Name (s):	
Last residential address:	
Last known occupation:	
Date of death:	

Section 3 – Will details

Do you have the original will? YES NO

Is the will witnessed by two people? YES NO

Is the will bound together and signed on each page by the testator and both witnesses? YES
NO

Is the will signed using the same ink? YES NO

Are there any staple marks or pin holes on the will? YES NO

Date of the will:	
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Section 3 – Will details (continued)

Was the deceased at least 18 years old when they signed the will? YES NO

Name of first witness to the will:	Surname: Given name(s):
Current address of first witness to the will:	
Name of second witness to the will:	Surname: Given name(s):
Current address of second witness to the will:	

If you are not able to provide the current address of the witness to the will please write 'address unknown' or 'deceased' as appropriate in the address field above.

If the will has not been witnessed by two people, the Probate Office cannot assist with your application. Please contact us to discuss your application further.

Did the deceased marry after the will was signed? YES NO

Did a divorce take place after the will was signed? YES NO

Did the deceased leave a codicil? YES NO

If you answered yes to the above question, please fill in the details of the codicil below:

Date of the codicil:	
Name of first witness to the codicil:	Surname: Given name(s):
Current address of first witness to the codicil:	
Name of second witness to the codicil:	Surname: Given name(s):
Current address of second witness to the codicil:	

Are there any executors named in the will/codicil who are not applying? YES NO N/A



Section 3 – Will details (continued)

If you answered yes above, provide the details of the executor below:

Surname:	
First Name:	
Middle Name (s):	

Why is the executor not applying? Please tick one of the options below:

- Executor now deceased and died before or within 30 days of deceased
 Executor now deceased but survived the deceased by more than 30 days
 Does not wish to apply at this time (leave reserved)
 Renounced
 Medically unable to apply

If an executor is not applying because they are medically unable to apply, an [affidavit by their treating medical practitioner](#) as to their incapacity to apply is to be signed and emailed together with this application.

If an executor has renounced, a completed copy of the [renunciation](#) and the sworn/affirmed [affidavit verifying renunciation](#) is to be emailed together with this application.

If another executor is not applying, provide their details below:

Surname:	
First Name:	
Middle Name (s):	

Why is the executor not applying? Please tick one of the options below:

- Executor now deceased and died before or within 30 days of deceased
 Executor now deceased but survived the deceased by more than 30 days
 Does not wish to apply at this time (leave reserved)
 Renounced
 Medically unable to apply

Section 4 – Deceased's assets and liabilities

Did the deceased leave assets in Victoria? YES NO

If you have answered no to the above question the Probate Office cannot assist with your application. Please contact us to discuss your application further.

Did the deceased hold assets in any other names? YES NO



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

If you answered yes above, provide the details of the other name below:

Surname:	
First Name:	
Middle Name (s):	

ASSETS OF THE DECEASED

In the space provided below list each of the known assets of the deceased.

TYPE OF ASSET: In the ‘Type of asset’ column specify what type of asset it is (e.g. bank account, accommodation bond refund, motor vehicle).

DETAILS OF ASSET: In the ‘Details of asset’ column provide details relevant to that type of asset, including address details (e.g. for a bank account you would provide the name of the bank, the branch the account is held, the BSB and Account numbers, for a motor vehicle you would provide the make, model, year and state of registration).

VALUE: In the ‘Value’ column include the monetary value of the asset at the date of death of the deceased (for some items, such as a motor vehicle it would be appropriate to include an estimated value).

The description, location and address of all assets must be included.

Only include assets that are solely in the deceased’s name or assets which the deceased held as a tenant in common as at the date of their death.

Type of asset	Details of asset	Value



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

LIABILITIES OF THE DECEASED

In the space provided below list each of the known liabilities of the deceased at the date of death.

TYPE OF LIABILITY: In the ‘Type of liability’ column specify what it is (e.g. credit card, mortgage, personal loan, household bill).

DETAILS OF LIABILITY: In the ‘Details of liability’ column provide details relevant to that liability (e.g. for a mortgage you would provide the name of the bank, the branch the account is held, the BSB and Account numbers, for a household bill you would provide details of who has issued the bill).

VALUE: In the ‘Value’ column include the monetary value of the liability at the date of death of the deceased.

A service, burial or cremation, and expenses related to applying for probate or administration that are incurred **after death** should NOT be included as liabilities.

Type of liability	Details of liability	Value