



INDEMNITY FOR RELEASE OF CREDIT BALANCE IN DECEASED RESIDENT'S ACCOUNT

PARTIES

1. Capital Guardians Pty Ltd, of 10/585 Little Collins Street, Melbourne, Victoria, 3000, Australia
("Capital Guardians")

2. Deceased Resident's Details

Full Name: ("Resident")

Date of Birth:

NHI Number:

3. Detail of person giving indemnity ("Indemnifier")

Full Name

Address

Phone

Relationship to Resident

INDEMNITY

1. The Indemnifier certifies that the Resident died at
..... on the/...../..... as set out in the
attached copy of the death certificate:

- leaving a Will naming the Indemnifier as the Resident's executor(s); or
- without leaving a Will, and the Indemnifier is claiming the credit balance of the Resident's account with Capital Guardians as an entitled person under sections 65(2) of the Administration Act 1969.¹

¹ An entitled person under section 65(2) of the Administration Act 1969 includes:

- (a) the widow, widower, surviving civil union partner, or children of the deceased person;
- (b) a surviving de facto partner of the deceased person;
- (c) the person beneficially entitled to the estate of the deceased person under the will or on the intestacy of that person (i.e. the person receiving the assets under the will, or a close relative);
- (d) any person appearing to be entitled to obtain administration of the estate of the deceased person in New Zealand (i.e. an executor named in the will, or one of the above people)

2. The Indemnifier confirms the Refund plus the Estate is less than \$15,000. **YES / NO**
3. The Indemnifier confirms the Refund plus the Estate is greater than \$15,000, in which case the refund will be made to the Court Appointed Administrator, Public Trust or Trustee Company. The Administrator or Trustee's name and contact details are as follows:

Estate Administrators Name

Address

.....

Phone

Email

4. In consideration of Capital Guardians paying the Indemnifier the credit balance of the Resident's account with Capital Guardians without any administration of the Resident's estate being obtained in New Zealand, the Indemnifier:
- (a) Will pay and discharge any debts that may be proved in the estate of the Resident;
 - (b) Will protect Capital Guardians from any claim or proceeding against Capital Guardians in relation to the credit balance of the Resident's account; and
 - (c) Indemnifies Capital Guardians against any direct or indirect damage, loss or cost on a full indemnity basis (including legal costs) and cleared by Capital Guardians, and any person, in relation to the credit balance and will reimburse Capital Guardians on demand the amount paid from the Resident's account.

SIGNATORIES

SIGNED by the Indemnifier) _____

Name of Indemnifier

Date

In the presence of

SIGNED by the Witness) _____
(Justice of the Peace)

Name of Witness

Address

.....

Date

ATTACHMENTS

Copy of Death Certificate