

Deceased members and public trustee estate guidelines

Death of a member and property related concessions

Where a property is registered solely in a deceased member's name and on his or her death when property related concessions (property rates, garbage collection and utility charges such as electricity, water and sewerage) would typically cease, it may be acceptable for the surviving spouse -- who is not the property owner -- to continue to receive some or all property related concessions connected to the property.

A decision on the continuation of concessions will be made on production of either a lawyer's or executor's Public Trustees letter stating the surviving spouse is the beneficiary of the deceased member's estate and is responsible for all debts incurred until the title is transferred into his or her name.

On receipt of this letter, the surviving spouse or partner will be entitled to claim a manual reimbursement for property related concessions until such time as the title is transferred. On the date of the transfer, the spouse will need to be a member or be seeking to become a member of the Scheme in their own right to continue to receive property related concessions.

All concessions will cease at this time should the spouse or partner not become a member of the Scheme.

Public trustee estates

In some cases where a property has been purchased by the Public Trustee on behalf of a member, the member may be eligible for concessions where:

- the property was purchased by the Public Trustee as instructed by the Courts
- the Public Trustee administers the funds in agreement with the member
- the member's property is registered solely in the name of the Public Trustee
- the member is responsible for all debts incurred at the property
- the member is the sole executor or executrix of the will.

The member must meet all other eligibility criteria to continue to access the Scheme and concessions.

Please contact us for further information.