

Transfer or close an Optus account

due to the loss of a loved one

OPTUS

Please accept our condolences. The death of someone close is always a difficult time, so we're here to help you manage their Optus services as simply as possible.

Part A - Who can be a representative?

A representative can act on behalf of the deceased customer and can manage their accounts and services.

A representative can be:

- an executor, administrator or trustee of the deceased's estate
- a lawyer or solicitor administering the will
- next of kin (an immediate family member such as a parent, son/daughter, sister/brother, grandchild, surviving spouse or guardian over the age of 18)
- a power of attorney
- an authorised representative listed on the Optus account

Part B - Service(s)

Please complete this section and indicate whether the service(s) are to be cancelled or transferred into a different account holder's name.

Devices, set top boxes and accessories

We'll let you know if you need to return any devices, set top boxes or accessories. We'll also send a prepaid mail bag if needed.

Prepaid services

We're unable to refund any unused credit for a Prepaid service that is cancelled.

Part C - Transfer details

Please complete this section to transfer any services listed in [Part B \(page 3\)](#) to the new account holder.

If the services are to be transferred to different people, please submit separate forms for each person. Please only include the information relevant to each new account holder.

Credit check

If you're transferring service(s), we'll need to complete a credit check. You'll need to provide at least 100 points of identification. See [Table A and Table B \(page 6\)](#).

Return this form and any supporting documentation by:



Email:

BereavementCare@optus.com.au



Mail:

Bereavement Care, PO
Box 888,
North Ryde
NSW 1670

What happens next?

Our specialised team will be in touch by phone or email within 10 business days.

Once your request has been processed, we'll send confirmation that your request has been completed.

If you need assistance completing this form, please visit your nearest [Optus store](#).

Part A - The representative

Your name:

I confirm that I can act on behalf of the deceased in the capacity of (please tick)

Executor

Trustee

Next of Kin

Administrator

Power of Attorney

Solicitor / Lawyer administering the will

Authorised representative on the Optus account

If we need to contact you, how would you prefer to be contacted? (please select at least one)

Phone

Your phone number:

Email

Your email address:

Letter

Your postal address:

The deceased

Please provide details for the deceased account holder.

First name:

Middle name (optional):

Surname:

Other names (optional):

Date of birth:

Optus account number:

Email address:

Representative's signature

Date signed

Part B - Service(s)

Use the section below to list any service(s) owned by the deceased.

To close an account, all service(s) must be cancelled or transferred to a different account holder. We'll notify you on how to return any devices, set top boxes and accessories.

Service(s)

on the deceased's account(s)

Cancel

Transfer

to a new account holder

Important information when transferring a service

When transferring service(s), most plans and features will continue to apply. If all services in a bundle are not transferred, then some discounts may no longer apply. We'll contact you if the plan or any applicable discounts are not available.

Direct Debit

Any existing Direct Debit arrangements will be cancelled. To set up Direct Debit once your service has been transferred, please register for My Account, download the My Optus app or get in touch at www.optus.com.au/contactus. If you choose not to pay by Direct Debit, you may be charged a \$2.20 non-Direct Debit fee each month.

Voicemail greeting

All custom settings will reset to default. This means voicemail greetings, greeting tones and other custom settings may be permanently deleted. Would you like a digital copy of the voicemail greeting for any mobile services listed above?

Yes, for these service(s):

No

A digital copy of the mobile voicemail greeting will be sent to the email address provided in Part A above.

Part C - Transfer details

If the services are being transferred to different people, please submit separate forms signed by each person. Please only include the information relevant to each new account holder.

Title: Full name: Date of birth:

Do you have an existing Optus account in your name that you'd like the service(s) transferred to?
(Note: This excludes the deceased's account number)

Yes No

If yes, please provide your account or service number:

If no, we will set up a new account for you. How would you like to receive your bill?

Email to:

Post to:

(a \$2.20 Paper Invoice Fee per bill may apply)

SMS to:

If you're not transferring service(s) to an existing Optus account, we'll use the above contact details to send information related to your service, bills, usage alerts and marketing communications. Log into [My Account](#) to change your contact details, manage your communication preferences or opt out of marketing communications from Optus once the transfer has been completed.

Credit check details

We'll need to complete a credit check before transferring any service(s). You'll need to complete this section and provide at least 100 points of identification. See [Table A and Table B \(page 6\)](#). We'll contact you if we need more information or if your credit check fails.

Current residential address:

Residential status: Rent Own Board

Duration at current address: Years: Months:

If you've lived at your current address for **less than two years**, please provide your previous address

Previous address:

Duration at previous address: Years: Months:

Your primary source of income

Permanent full-time employment

Permanent part-time employment

Casual employment

Another family member

Centrelink (pension – aged, veterans, disability etc.)

Centrelink (benefits/allowances – Newstart, youth allowance etc.)

Superannuation/annuities

Investments

Business/partnership/trust profits

If permanent full-time, permanent part-time or casual employment, please provide details:

Position:

Employer name:

Employer's phone number (optional):

Time in position:

Years:

Months:

If sole-trader or self-employed, please provide details:

ABN:

Number of employees:

By signing this form, you agree that:

- Your application to transfer any service(s) is subject to a credit check and [Optus Terms and Conditions \(www.optus.com.au/about/legal\)](http://www.optus.com.au/about/legal). View the [Optus Privacy Policy \(www.optus.com.au/about/legal\)](http://www.optus.com.au/about/legal) to see how we handle your information.
- The information provided on this form is accurate to the best of your knowledge.

By transferring any service(s), you agree that you will be responsible for future handset repayments and any service charges incurred.

Representative's signature

Date signed

Checklist

You'll need to provide some documentation with this form. We've created a checklist to make it easier.

Completed and signed the form

Listed all services and indicated if they should be cancelled or transferred

One of the following to confirm you can act as a representative

- A statutory declaration confirming your authority to act
- A letter confirming the executor, administrator or trustee of the estate
- A letter from a lawyer or solicitor administering the will

One of the following to confirm your identity

- Drivers' licence
- Passport
- Marriage certificate
- Birth certificate

One of the following as proof of death

- Death certificate
- Death notice
- Doctors' medical certificate
- Grant of Probate
- Letters of Administration
- Funeral bill
- Link to funeral notice or obituary:

If you're transferring service(s), we'll need to complete a credit check. Please provide 100 points of identification. See Table A and Table B below.

TABLE A	
You must provide at least one form of identification from Table A.	Points
Australian full, provisional or learner driver licence	70 Points
Government-issued identity/proof of age card (with photo) and Medicare card	
Australian or International passport	

TABLE B	
	Points
Pensioner concession card/veterans' affairs	30 points
Medicare card	30 Points
Valid tertiary student ID card (with photo, student number and institution)	
Full Australian birth certificate	
Australian citizenship/marriage certificate	
Existing Optus account number in your name	
Australian gun/firearms licence	
Australian Police/Defence Force Identity Card	
Vision Impaired Transport Concession Card	
Concession Health Care Card	