

Deceased Estate – Funeral Payment Request



Use this form to request withdrawal of funds from the Deceased’s CDF accounts (including Term Investments) for payment of funeral expenses up to \$15,000.

Important Information - the Death Notification process must be completed prior to, or at the same time, submission of this request.

Send the signed form and supporting documents to csg@melbcdf.org.au.

Section 1 Estate Details

Full Name of the Deceased Account Holder

Estate of the Late

Member Number

Address

Section 2 Withdrawal of Funds

I/we request the withdrawal of funds from the following account(s):

Account Number	Amount
	\$

Account Number	Amount
	\$

Section 3 Supporting Document Checklist

Important Information – CDF will pay the funeral provider directly and will provide the authorised representative with a remittance advice once complete.

I/we confirm we have attached the following document to this request:

☐ Funeral Invoice

Section 4 Authorised Representative details

Please provide the details of the person submitting this request.

Full Name

Email

Contact Number

Authorised Representative Type

☐ Executor

☐ Administrator

☐ Next of Kin

☐ Authorised Party on behalf of Executor/Administrator

Section 5 Declaration and Signature/s

This section must be physically signed by ALL authorised representatives and witnessed for your instructions to be executed.

I/we

- Indemnify and will continue to indemnify CDF Community Fund (hereafter referred to as CDF) from and against any loss (including but not limited to any direct or indirect) damage, loss or cost (including legal costs) it may suffer because it makes the requested transfer and/or payment of funds held in the name of the deceased
- Will protect CDF from any claim or proceedings against CDF in relation to the credit balance of all accounts and investments related to this request

By signing this request, I/we acknowledge and agree that:

- a. CDF may use and disclose my/our information for its internal administration and operations; and
- b. CDF may disclose my/our information to other parties authorised and/or required by law to collect information related to this request and facilities held by the deceased

Authorised Representative

Full Name

Role

Signature

Date Signed (dd/mm/yyyy)

Witness

Full Name

Signature

Date Signed (dd/mm/yyyy)

Important Information

Disclosure Statement: CDPF Limited, a company established by the Australian Catholic Bishops Conference, has indemnified the CDF Community Fund ABN 94 380 397 118 (the Fund) against any liability arising out of a claim by investors in the Fund. In practice, this means your investment is backed by the assets of Catholic Archdiocese of Melbourne. The Fund is required by law to make the following disclosure: Investment in the Fund is only intended to attract investors whose primary purpose for making their investment is to support the charitable purposes of the Fund. Investor's funds will be used to generate a return to the Fund that will be applied to further the charitable works of the Catholic Church. The Fund is not prudentially supervised by the Australian Prudential Regulation Authority, nor has it been examined or approved by the Australian Securities and Investments Commission (ASIC). An investor in the Fund will not receive the benefit of the financial claims scheme or the depositor protection provisions in the Banking Act 1959 (Cth). The investments that the Fund offers are not subject to the usual protections for investors under the Corporations Act (Cth) or regulation by ASIC. Investors may be unable to get some or all of their money back when the investor expects or at all and investments in the Fund are not comparable to investments with banks, finance companies or fund managers. The Fund's identification statement may be viewed here or by contacting the Fund. The Fund does not hold an Australian Financial Services Licence. The Fund has entered into intermediary authorisation with CDFCF AFSL Limited ABN 49 622 976 747, AFSL No. 504202 to issue and deal in debentures.

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