

**DOCUMENT REQUEST**

Whose documents are being requested:

Client 1:	
Client 2:	
Address:	
Telephone:	(     )
Email:	

Are you the person whose document(s) are being requested?

Yes    OR     No

If no, please outline who you are and the authority you rely on to make this request:

Individual 1:			
Address:			
Telephone:	(     )		
Email:			
Authority to request:	<input type="checkbox"/> Attorney/Administrator	<input type="checkbox"/> Executor	<input type="checkbox"/> Other:

Individual 2:			
Address:			
Telephone:	(     )		
Email:	(     )		
Authority to request:	<input type="checkbox"/> Attorney/Administrator	<input type="checkbox"/> Executor	<input type="checkbox"/> Other:

**AUTHORISATION / IDENTIFICATION**

Requesting Party:

1. **One form of Primary ID required for requesting party (must be original or certified<sup>†</sup> copy):**

Australian driver's licence    OR     Australian Passport

2. **And if you are not the person whose documents are being requested:**

Attorney / VCAT Administrator	<input type="checkbox"/>	* Certified <sup>†</sup> copy of Power of Attorney OR VCAT Administration order
	<input type="checkbox"/>	* Evidence of a lack of decision making capacity <sup>‡</sup> – Original or certified <sup>†</sup> copy Medical Certificate (If the person has capacity, they need to sign this authority)
Executor / Administrator	<input type="checkbox"/>	* Evidence of death – Original or certified <sup>†</sup> copy of Death Certificate
	<input type="checkbox"/>	* Grant of probate / letter of administration (if we don't hold the final Will)
Other evidence (if not within above categories)	<input type="checkbox"/>	<input style="width: 500px; height: 20px;" type="text"/>

*\*required*

**Note:**    † Certified copy means a photocopy of your ID certified by a lawyer, medical practitioner, pharmacist, JP, accountant or police officer. An uncertified photocopy is not sufficient. You can email certified ID. Alternatively, you can bring your original photo ID to Moores and we will certify.  
**Multiple Attorneys/Executors** written authorisation and certified photo ID is required from all parties.

‡ At a minimum, evidence of a lack of decision making capacity will require a signed and dated letter from a medical practitioner that states in their opinion that:  
i. the person does not have decision making capacity; and  
ii. the diagnosis or other reason for lack of decision making capacity.

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## MODE OF COLLECTION

Choose <u>one</u>	Collection Method
	Personal collection
	Email
	Regular post
	Registered Post
<b>Please also tick below if required urgently</b>	
	Urgent (less than 5 business days) - NB costs below

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## DOCUMENTS REQUESTED

We can only release original Wills to the Willmaker

Choose one		Original	Certified copy	Number of copies
	Complete packet containing all original document(s) held in safe custody			
	Specified document(s) as follows:			

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## NOTE:

- i Provision of 3 copies of each document in one calendar year is complimentary. Additional copies or certified copies will incur a charge of \$10.00 + GST per document.
- ii Urgent requests that require a file recall from offsite facilities will incur a charge of \$80.00 + GST.

We will confirm charges with you if necessary and will require payment upfront.

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## AUTHORITY TO RELEASE

I warrant that I am duly authorised to make this request for documents and hereby authorise Moores to release the requested documents:

Signature:      1 \_\_\_\_\_                      2 \_\_\_\_\_  
Print name:      \_\_\_\_\_                      \_\_\_\_\_  
Date:              \_\_\_\_\_                      \_\_\_\_\_

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## WHAT HAPPENS NEXT?

1. Once completed, please print and sign this form and email executed form to [safecustody@moores.com.au](mailto:safecustody@moores.com.au)
2. We will assess your request within 5 business days from the date on this form or the date of receipt of the email and confirm the next steps after that.
3. Once all requirements are met, we will deliver the documents as per mode of collection.