



Telstra Small Business Bereavement

Here's how to complete the form

Losing a work colleague is difficult, so we want to make managing their Telstra services as simple as possible.

Part A – Who can be a representative of a Deceased customer?

Only people who are authorised to act on behalf of the Deceased customer can access and change that customer's account and services.

Representatives aren't required to provide a copy of the death certificate, but they must be one of the following:

- The executor, trustee, or administrator of the estate;
- The Deceased's next of kin;
- A person with a suitable power of attorney from the Deceased;
- A lawyer or solicitor administering the Deceased's will; or
- An authorised representative listed on the Deceased's account.

Part B – Service(s)

In Part B, you can specify if you would like all services on an account to be transferred or cancelled, or you can specify for individual services.

We will notify you on how to return hardware and leased equipment, as this cannot be returned to Telstra stores or the address on this form.

Part C – Transfer details

In Part C, let us know what services we need to transfer.

If services are being transferred to different businesses or individuals, please submit separate forms with only the information relevant to the incoming customer.

Part D – Opening a new business account

In Part D, if you do not already have a business account with us, let us know the trading information and details specific to the new business.

Part E - Information about the new owner

In Part E, we require some of your personal details in order to complete a credit assessment. You'll need to provide 100 points of ID.

For more information on what ID you can provide to Telstra, including a comprehensive list of acceptable identification, please visit telstra.com/idcheck

Your application cannot proceed if this information is not provided.

If you need a Directory Listing, Caller Identification or Priority Assist, you need to select your preferences.

You can return this form by:



Email Scan a copy of the form, add 'Bereavement Support' in the subject line and email to bereavement@support-team.telstra.com



Mail Telstra Bereavement Support Locked Bag 20026, Melbourne VIC 3001

This form is only suitable for Business Customers with ABN's.

Customers without ABN's should complete the Consumer Bereavement form.

This form lets the representative of a Deceased customer cancel or transfer their Telstra services.

If you are the account holder and someone that used a service on your account has passed, you can also use this form to cancel or transfer that service.

Please complete all the relevant sections so that we can assist you as soon as possible.

Once you've returned this form, we may contact you to discuss any further details, such as hardware or equipment return.

Where a customer is critically ill or in palliative care, please contact Telstra on **13 22 00** and say **'Critical Illness.'**



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Part A - The Representative

Your name

Date of birth

I confirm that I act on behalf of the Deceased in the capacity of (please tick):

Executor

Next of Kin

Solicitor/Lawyer administering the Will

Trustee

Administrator

If we need to confirm more details, how would you prefer to be contacted?

Phone

Email

Letter

Your phone number

Your email

Final bill address or email

The Deceased

Did the Deceased customer identify as Aboriginal and/or Torres Strait Islander?

Yes

No

Name

(Optional for Aboriginal and/or Torres Strait Island customers)

Date of birth

Date of death

Was the Deceased the account holder or a user of a service on your account?

Account holder

Service user

Please complete as applicable:

Company Name (as per ASIC) – if applicable

ACN

Business Trading Name

ABN/ARBN

I confirm that I'm the Representative of the Deceased Customer named above ('Estate') and I'm authorised to deal with Telstra on behalf of the Estate. I agree to compensate Telstra for any liability or loss arising from or in connection with Telstra acting on my instructions.

Representative's signature

Date signed



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Part B- Service(s)

Complete this part with all the service(s) on the account.

For the account to be finalised, the service(s) must either be cancelled or transferred.

We will contact you on how to return any hardware or equipment. You can specify if you would like all service on an account to be transferred or cancelled, or you can specify for individual services.

If specifying for individual services, please provide the number or ID for each of the Deceased’s Telstra services you would like to transfer or cancel. This includes Landline, Inbound Services, Mobiles, Internet, email addresses, Telstra App Marketplace, Telstra Business Services and Telstra Business Systems. If you are unsure, review a recent bill or contact us on **13 2200** and say ‘Bereavement Support’.

Specify for whole of account number(s)

Transfer Cancel

Or specify for individual service(s)

Transfer Cancel

Would you like a copy of the voicemail greeting of any of the services listed?

Yes Number(s) with voicemail

Not required

How would you like to receive the recording?

Email

CD

Telstra Plus

Telstra Plus is our rewards program that recognises you for being with us. You can earn points based on your eligible spend and use your points towards discounts on products in the Rewards Store.

If the Deceased had Telstra Plus points, would you like them transferred to your account?

Yes

No

(Please note that you will need to sign up for a Telstra ID at id.telstra.com.au/register prior to the points being transferred.)



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Please note – services to be transferred

- Services to be transferred can include but not limited to:
 - Landline services;
 - Mobile services (including leased services);
 - Internet (Fixed and Wireless).
- Trusts and Partnerships are not legal entities in their own right and must be represented by either the Trustee or Partner, being a legally authorised Individual or a Trustee or Partnership Company's director. The Trustees or Partners will be liable for all debts incurred in respect of a service.
- Some services can't be transferred and will need to be disconnected and a new service set up. Please visit telstra.com to find out if your service can be transferred.
- The new owner can obtain a copy of the Critical Information Summary associated with the plan being transferred from **telstra.com** (search Critical Information Summary).
- When services in a bundle are nominated to transfer (e.g. Digital Office Technology (DOT), BizEssentials, Telstra Bundles, etc), all services within the bundle will move to the new owner.

To discuss your pricing options after the transfer has taken place please contact Telstra on **13 20 00**.

TBS (Telstra Business System)/Phone System Business to Business transfers only.

If the TBS/Phone System is under a Finance Contract, you'll need to contact Capital Finance on 1300 133 873 to organise the transfer independently. Applies to services on your bill referencing 'Finance Repayment Capital' against the 10 digit TBS number under 'Other Charges & Credits'. All TBS agreements with Capital Finance repayment options are between the contract signatory and Capital Finance directly.

Telstra acts on behalf of Capital Finance as a third party biller and is unable to make changes to the billing details of the finance contract without their approval. Capital Finance may charge a transfer fee. Until Capital Finance has agreed to the transfer, charges will continue to bill to the current owner. Upon Capital Finance confirming approval of the transfer to the new legal entity, Telstra will be notified directly of the new entity details and all TBS/Phone System charges (including maintenance) will be transferred to the new owner.



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Part C - Transfer Details

If services are being transferred to different people, please submit separate forms with only the information relevant to the incoming customer.

Title (Mr, Mrs, etc.) Full name Date of birth

Do you have an existing Telstra account you would like the service(s) transferred to?
(Not the Deceased's account number.)

Yes No

If Yes, please state the account or service number

How would you like to receive your bill?

Email Paper Braille A3

Bill address

Part D – Opening a new business account

I warrant that I am authorised to make this request on behalf of the incoming customer.

I have read and understand all statements made in this application form.

I am requesting that the legal responsibility of the services listed above be transferred to the new owner whose details are included on this form.

Full name Date of birth Email address

Please complete as applicable:

Company Name (as per ASIC) – if applicable ACN

Business Trading Name ABN/ARBN

Business Address (must be a fixed address, cannot be a PO Box address, etc.)

Level/Unit no. etc. Street address Postcode

Business Mailing Address (if different to Business Address above.)

Signature

Date signed



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Part E – Information about the new owner Identification

Primary ID (e.g. Australian Driver’s Licence or Australian Passport - see Table A for full list.)

Document type	Document number	Expiry date
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Secondary ID (e.g. Medicare card - see Table B for full list.)

Document type	Document number	Expiry date
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Medicare card only: Name and Individual Reference Number (IRN)

Mobile transfers only: If you haven’t been an existing Telstra customer for more than twelve months, you’ll need to attend a store with 100 points of identification and this form.

Sighted by (staff ID)

Directory Listing

Your Directory Listing setting determines whether your name, address and phone number will be included in the printed and online White Pages and Directory Assistance.

Directory Listing options

List my details – Your details will be published in the printed and online White Pages and available via Directory Assistance.

Do not list my details – Your details will not be published in the printed and online White Pages and available via Directory Assistance.

Caller Identification

Your Caller Identification settings determines whether your phone number is visible to people when you call from your landline.

Caller ID On – Your Caller ID will be visible when you call others.

Caller ID Off – Your Caller ID will not be visible when you call others.



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Priority Assist

Telstra offers a priority assistance service for customers (and those that live with them) who:

- Have been diagnosed with a life-threatening medical condition with a high risk of deterioration; and
- Whose life may be at risk without access to a fully operational standard telephone service.

If you require access to the Priority Assist service, you must:

- Fill in the details of the service number that requires the Priority Assist below before you submit this Bereavement Application form; and
- Complete the Priority Assist form and submit it along with any required documentation to the email, fax or post details on the form within 28 days of submission of this Bereavement Application form.

You can obtain a copy of the Priority Assist application form by:

- Going to **Telstra.com** and searching 'Priority Assist'
- Contacting Telstra on **13 2200**
- Going to a Telstra store

Priority Assist covers one fixed phone service per premises. If you have multiple premises, please complete this application form and submit the Priority Assist form for each phone line requiring Priority Assist.

I am eligible for Priority Assist access on service number:

As part of your bereavement request we will provide you with provisional Priority Assist access until your Priority Assist application form has been received and approved.

Should we determine you are not eligible for Priority Assist, we may charge you additional fees for the period of time you received the provisional Priority Assist service.

Note: Please be aware that the Priority Assist service will be added on the date of the service transfer (minimum of 7 working days post request). If you currently do not have access to a reliable mobile phone service that can be used in the event of an emergency while we are progressing the bereavement request, please call Telstra on **13 2200** so we can ensure you have an alternative working service.



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By signing this form, I agree that I will be responsible for paying any fees or charges for this service and any associated devices or accessories:

- (a) that haven't already been paid before transfer; or
- (b) that become payable after the time of transfer.

I will be liable to pay all outstanding (whether or not already billed) fees and charges, including minimum monthly spend and access fees for each of the services listed above that are transferred and any additional fees or charges incurred by or applicable to the products or services as and when they fall due.

New Owner's signature

Date signed