

Transfer or Close an Optus Account

due to the loss of a loved one

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.

How to use this form

- Use the form fields below to type your information directly into the document.
- Check boxes are provided for choices. For single-choice questions, select one option only.
- If you print the form, you can also complete it by hand.
- Return the completed form with the supporting documents listed in the checklist.

Return this form to either

- **Email:** BereavementCare@optus.com.au
- **Mail:** Bereavement Care, PO Box 888, North Ryde NSW 1670

What happens next

- The specialised team will contact you by phone or email within 10 business days.
- Once the request has been processed, Optus will send confirmation that the request has been completed.
- If you need help completing the form, visit your [nearest Optus store](#).

Part A – Representative and deceased details

Who can be a representative?

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

- Executor, administrator or trustee of the deceased estate
- Lawyer or solicitor administering the will
- Next of kin, such as a parent, child, sibling, grandchild, surviving spouse or guardian over 18 years old
- Power of attorney
- Authorised representative listed on the Optus account

Your full name

I confirm that I can act on behalf of the deceased in the following capacity.

- ☐ Executor
- ☐ Trustee
- ☐ Next of kin
- ☐ Administrator
- ☐ Power of attorney
- ☐ Solicitor or lawyer administering the will
- ☐ Authorised representative on the Optus account

If Optus needs to contact you, how would you prefer to be contacted?

Select at least one

- ☐ Phone
- ☐ Email
- ☐ Letter

Your phone number

Your email address

Your postal address

The deceased

First name

Middle name (optional)

Surname

Other names (optional)

Date of birth

Optus account number

Email address

Part B – Services

List each service on the deceased customer's account and mark whether each service should be cancelled or transferred.

To close the account, all services must be cancelled or transferred.

Service(s) of the deceased	Cancel	Transfer
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐

Important information when transferring a service

- Most plans and features will continue to apply.
- If not all services in a bundle are transferred, some discounts may no longer apply.
- Existing Direct Debit arrangements will be cancelled.
- To set up Direct Debit after transfer, register for My Account, use the My Optus app, or visit www.optus.com.au/contactus.
- If you choose not to pay by Direct Debit, a \$2.20 non-Direct Debit fee may apply each month.
- Custom voicemail greetings, greeting tones and other custom settings will reset to default and may be permanently deleted.

Would you like a digital copy of the voicemail greeting for any mobile services listed above?

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

If yes, list the service number(s)

Part C – Transfer details

Complete this section only if one or more services are being transferred.

If services are being transferred to different people, complete a separate form for each new account holder.

Title

Full name

Date of birth

Do you have an existing Optus account in your name for the transfer?

☐ Yes ☐ No

If yes, please provide your account or service number

If no, Optus will set up a new account for you.

How would you like to receive your bill?

☐

Email to

☐

SMS to

☐

Post to

For post, a \$2.20 paper invoice fee per bill may apply.

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 on page 10](#). We'll contact you if we need more information or if your credit check fails.

Please enter your current residential address.

Number

Unit number (optional)

Street

Suburb

State

Postcode

Residential status

☐

Own

☐

Rent

☐

Board

Years at current address

Months at current address

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

Previous address

Years at previous address

Months at previous address

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)

Years at position

Months at position

If you're a **sole-trader** or **self-employed**, please provide details:

ABN

Number of employees

Part D - Declaration and Signature

Identity verification and credit check notice

Identity verification: Read the Optus Identity Document Verification Notice at www.optus.com.au/about/legal/identity-document-verification-notice to understand how Optus confirms identity, your rights, Optus obligations, the impact of withholding consent, how to make a complaint, and where to find more information about the government-operated identity document verification service.

Credit assessment: We will collect, use and share your credit-related personal information with credit reporting bodies to assess your creditworthiness before transferring any service(s). Our Privacy Policy contains information about how we handle and share your personal information for credit reporting purposes, how to access and correct your credit related personal information and how to make a complaint.

If you would like more information about our privacy practices, including how we collect, store, use and share your personal information, please refer to our Privacy Policy, available at www.optus.com.au/privacy.

By signing this form, you confirm that:

- If you're transferring service(s):
 - you are authorised to provide the personal details presented and you consent to your information being checked with the document issuer or official record holder via third party systems for the purpose of confirming your identity.
 - you consent to your personal information being shared with external credit reporting bodies for the purpose of performing a credit assessment.
- The information provided on this form is accurate to the best of your knowledge.

Representative signature

Date signed

Checklist and supporting documents

Documents 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

Documents to confirm your identity

- Drivers licence
- Passport
- Marriage certificate
- Birth certificate

Proof of death

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

Before sending this form make sure you have

- Completed and signed the form
- Listed all services and marked whether they should be cancelled or transferred
- Included one document confirming you can act as a representative
- Included one document confirming your identity
- Included one document as proof of death
- If transferring services, included at least 100 points of identification

Identification points for service transfer

Provide at least **one** form of identification from **Table A** and enough total identification to reach **100 points**.

Table A identification	Points
Australian full, provisional or learner driver licence	70
Government-issued proof-of-age card with photo and Medicare card	70
Australian or international passport	70

Table B identification	Points
Pensioner concession card or veterans' affairs card	30
Medicare card	30
Valid credit or debit card	30
Valid tertiary student ID card with photo, student number and institution	30
Full Australian birth certificate	30
Australian citizenship or marriage certificate	30
Existing Optus account number in your name	30
Australian gun or firearms licence	30
Australian Police or Defence Force identity card	30
Vision Impaired Transport Concession Card	30
Concession Health Care Card	30