

Probate. It's what we do

Giving you confidence to fulfil your
role as executor or administrator

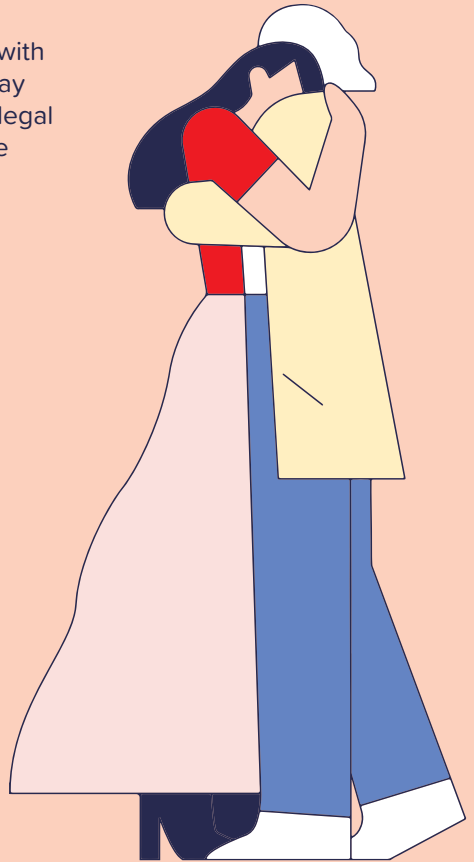


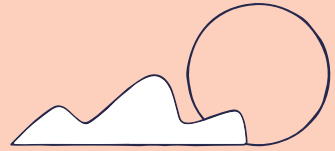
Public
Trust

We're here to support you

Handling a loved one's estate is a responsibility that often arrives at a time of grief and uncertainty.

The legal and practical steps can feel overwhelming, especially if you're unfamiliar with the process or unsure where to begin. You may find yourself navigating complex paperwork, legal requirements and financial decisions, all while supporting family and friends.

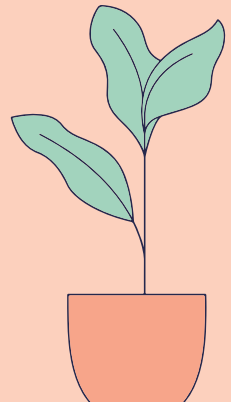




At Public Trust, we understand how daunting this can be. For over 150 years, we have been New Zealand's specialists in probate, letters of administration and estate administration. Our experienced team is here to provide expert support and guidance, making things easier and ensuring you have everything you need to fulfil your role as executor or administrator with confidence.

Our service is personal and professional. Whether you need help with the application for probate or letters of administration, support with specific tasks, or a full end-to-end service, we're committed to making the process straightforward and as stress-free as possible. We provide you with clear and competitive fees upfront.

With Public Trust, you're never alone. We're here to support you every step of the way, giving you the confidence to fulfil your role and honour your loved one's wishes.

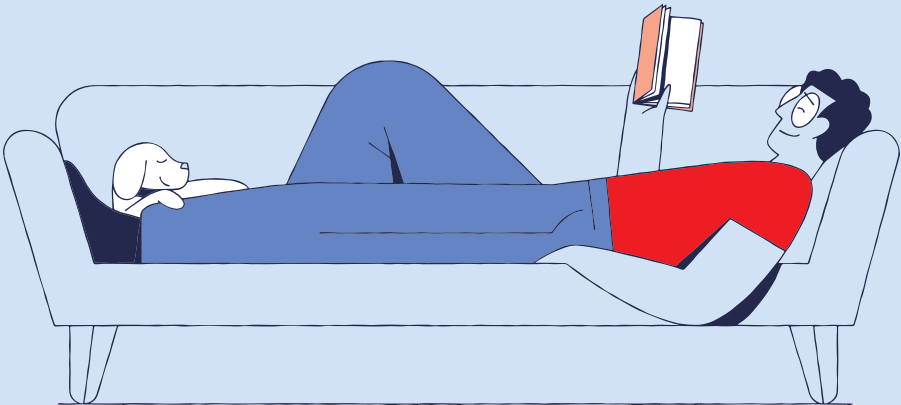


Probate or letters of administration?

When a loved one passes away and owns assets worth more than \$40,000, their estate needs to be formally managed. This often requires probate or letters of administration.

Probate applies when there is a valid will, confirming an individual's role as an executor.

Letters of administration is needed when there is no will, giving a suitable person (usually a close relative) the authority to handle the estate. They are also necessary if there is a will, but none of the named executors are willing or able to act or there are no executors named.





What can you expect from us

We're here to support you every step of the way, giving you the confidence to fulfil your role and honour your loved one's wishes.

01

Find the right service

Take a look at the different service options to find the support that's right for you. Each option starts with a base fee, giving you confidence and transparency from the outset.

02

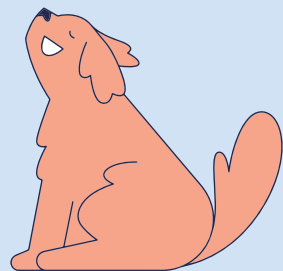
Connect with a specialist

Complete our online form for probate or request a call back and one of our specialists will be in touch at a time that suits you. We'll answer your questions and guide you through the next steps.

03

Provide key information

We'll confirm what additional documents are required and provide you with a detailed fee estimate. Once everything is collated, we'll prepare and submit the necessary court documents to secure your grant of probate or letters of administration. Once the grant is issued, we can support with handling assets and ensuring a smooth transition to beneficiaries, if required.





We're here to lighten the load

We offer support for private executors or administrators. Explore our service options to find the level of support that's right for your situation.



Probate

If the deceased had assets in their sole name worth more than \$40,000 and a valid will, you might want support with the probate application process.

What's included?

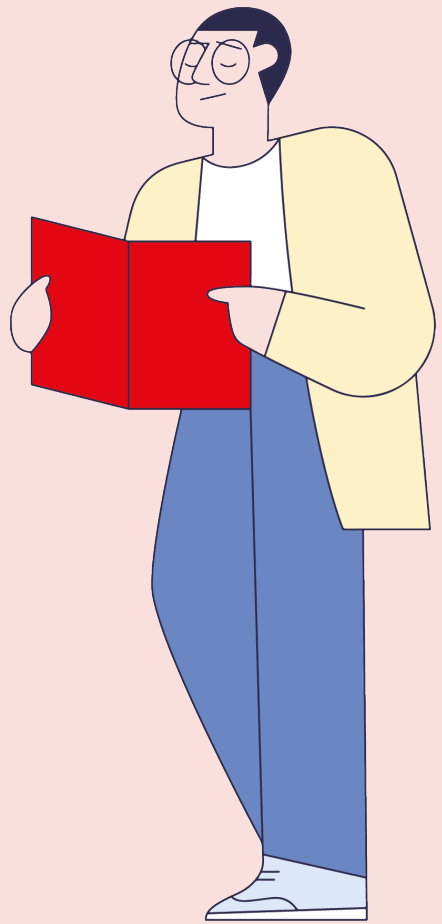
- > **Expert review:** We assess your case and guide you through the process.
- > **Document preparation:** We draft the right legal documents for your situation.
- > **Signing and filing:** We help facilitate signing your application and handle its submission to the High Court.
- > **Court liaison:** We deal with any queries that arise, so you don't have to.

Foreign wills: If the will was written overseas, extra steps will apply to confirm the validity of the will in the country it was written. We recommend you get in touch with one of our probate specialists to discuss next steps.

Once probate is granted, you can move forward with managing the estate, or contact Public Trust for additional support.

See our website for pricing

You'll need to cover High Court filing fees and any other relevant disbursements which cost from \$269 including GST, depending on your needs.



Letters of administration

You might want support with letters of administration, which are required if the deceased had assets in their sole name worth more than \$40,000 and did not have a will. Letters of administration are also required if none of the named executors are willing or able to act, or there are no executors named.

What's included?

- > **Expert review:** We assess your situation and guide you through the process.
- > **Document preparation:** We draft the right legal documents for your application.
- > **Signing and filing:** We help facilitate signing and handle submission to the High Court.
- > **Court liaison:** We manage any queries that arise.
- > **Publishing notices:** We take care of any required legal notifications.
- > **Dedicated support:** You'll have a specialist guiding you every step of the way.

Once letters of administration are granted, you can move forward with managing the estate. If there's no will, the estate is handled under the Administration Act 1969, which sets out who benefits when someone passes away without a will.

See our website for pricing

You'll need to cover High Court filing fees, any required notices and any other relevant disbursements, which cost from \$390.95 incl. GST, depending on your needs.





Flexible Estate Support

Every estate is unique, and our Flexible Estate Support service allows you to choose the level of assistance that best suits your needs beyond probate or letters of administration. From support with the entire process or just specific tasks, such as property management, debt settlement, or handling overseas assets – we're here to help.

You might want help with some or all of the following:

- > **Probate or letters of administration service:** Full application preparation and High Court filing.
- > **Setting up an estate trust account.**
- > **Finalising estate and personal tax:** Ensuring compliance with tax obligations.
- > **Managing property:** Security, maintenance, sale, or transfer, including all legal work.
- > **Collecting assets and settling debts:** Handling finances, funeral expenses and outstanding payments.
- > **Confirming overseas assets and liabilities:** Ensuring all components of the estate are accounted for.
- > **Navigating complex assets:** Support for timeshares, overseas property and international assets.
- > **Additional support:** House clearance, shipping valuables, sale of high-value belongings and more.
- > **Distributing the estate:** Distributing the estate as per the will or the Administration Act 1969.
- > **Finalising estate financial records:** Completing documentation to close the estate.

How much does it cost?

The total cost will depend on the complexity of the estate and the level of support required. Before we begin, we'll review your situation and provide a detailed estimate, so you know what to expect.

You'll need to cover High Court filing fees and any required notices, which cost from \$269 incl. GST, depending on your needs.



You've got questions, we've got answers

I'm an executor who has already got grant of probate or letters of administration. Can Public Trust still help me with estate administration?

Yes, whether you need help with one part – like tax returns or managing property – or full estate administration, we're here to support you. Get in touch to find out what we can assist with.

Can I submit the probate application myself?

Yes, you can. Getting probate granted can be tricky and time consuming if the application is missing any key information. Public Trust can make it easy by preparing and filing the application for probate on your behalf.

Do I need to involve a solicitor in the probate or letters of administration process?

No, not if you're engaging Public Trust to assist with this process. Public Trust is authorised to carry out all the legal functions involved in the application process. We'll give you a detailed fee estimate and a dedicated specialist to guide you through the process.

You might need to involve a solicitor if you decide to complete this application without engaging us.

What if I'm an executor as well as a beneficiary?

This isn't uncommon and there shouldn't be any conflicts of interest unless there are disputes. You can find more information about being an executor by visiting our website publictrust.co.nz

How do I know Public Trust is going to do the right thing?

We were established in 1873 to protect the future of New Zealanders, something we've been doing proudly ever since. Our duties and responsibilities are set out in the Public Trust Act 2001, and our actions as executor are laid out under the Administration Act 1969. As a Crown Entity, you can be sure that we take following the proper process very seriously!

Still have questions?

You'll find lots of helpful information about estate administration on our website, visit publictrust.co.nz.

If you'd prefer to speak with someone directly, our specialists are here to help:

- > call **0800 783 932**
- > email executorassist@publictrust.co.nz





Common terms

Estate administration comes with more than its fair share of technical words and phrases. Here are some definitions to help make sense of things.

Administration (of an estate):

The process of identifying and distributing someone's property and assets after they have passed away. This is done according to their will, if there is one.

Assets:

Anything of value that the person who has passed away owned in their sole name, such as property, a car, cash, shares or KiwiSaver.

Beneficiary:

A person, organisation, trust or charity who will receive something from the estate, either through the will or if there is no will, under the Administration Act 1969.

Collecting assets:

Finding out what the person owned, letting the relevant organisations know you have the authority to manage these assets, and following their process to release them.

Creditor:

Any person or organisation the person who has passed away owed money to.

Debts:

Any money the person who has died owed – this could be anything from an energy bill to a mortgage.

Distribution/distributing the estate:

Passing on the assets from the estate to the people or organisations who are entitled to them.

Estate:

Everything a person owns at the time of their death that can be passed on through their will. Jointly owned assets usually go straight to the other owner and aren't part of the estate.

Gift:

A specific item or sum of money left to someone in a will.

Intestate:

When someone dies without a valid will, they are said to have died 'intestate'.

Letters of administration:

A legal document from the High Court that gives someone the authority to manage an estate when there is no will, or when there are no named executors able or willing to act or no executor named.

Probate:

A legal document from the court that confirms a will is valid and gives the named executor/s the authority to manage the estate.

Pre-paid funeral trust:

A way to set aside money for your funeral in advance, making things easier and less stressful for your loved ones.

Re-seals:

If probate or letters of administration have been obtained in another Commonwealth country and there are New Zealand assets to be dealt with, probate or letters of administration can be 're-sealed' with the High Court in New Zealand, giving authority to deal with those assets. If probate or letters of administration has been obtained in a non Commonwealth country like the USA, and there are New Zealand assets to be dealt with, a new grant of probate or letters of administration from the High Court in New Zealand is usually required.

Why choose Public Trust?

With over 150 years of experience, estate management is at the heart of what we do – we manage more than 2,000 estates every year, giving you confidence that your loved one's estate is in safe hands. Our specialist team of estate, legal and accounting professionals ensures the process runs smoothly and efficiently. We pride ourselves on delivering personal service, guiding you through every step with empathy and clarity. Costs are transparent and competitive, with clear pricing provided upfront – no surprises. Plus, our flexible service means you can choose the level of support that suits your needs, whether it's help with probate or letters of administration, assistance with specific tasks, or full estate administration from start to finish.

Contact us today
0800 783 932
executorassist@publictrust.co.nz
publictrust.co.nz



Find out more at
publictrust.co.nz



**Got any questions about
what you've read?**

**We have the expertise and
experience to help you – with
convenient options to get
sorted online, in-person or
over the phone.**

