O'HEARN LAWYERS

REQUEST FOR RELEASE OF DOCUMENTS HELD IN SAFE CUSTODY

Please email completed form to safecustody@ohlaw.com.au

Please note we cannot facilitate collection of documents without an appointment

1. DETAILS OF CLIENT WHOSE DOCUMENTS ARE BEING REQUESTED

Details of person/s whose documents are being requested:

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

2. AUTHORITY TO REQUEST

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

Yes ☐ No ☐

If YES, proceed to section 3.

If NO, provide the following details including the authority you rely on to make this request AND an original or certified copy of the document you rely on for that authority. If there are multiple joint attorneys or more than one executor, ALL persons must provide authority

Individual 1:						
Address:						
Telephone:	( )					
Email:						
Authority to request:	☐	Attorney	☐	Executor/administrator	☐	Other:

Individual 2:						
Address:						
Telephone:	( )					
Email:						
Authority to request:	☐	Attorney	☐	Executor/administrator	☐	Other:

If O'Hearn Lawyers do not hold the original document, an original or certified copy of the document/s confirming authority to request documents is to be provided:

☐ Certified copy of Power of Attorney OR Financial Management Order.

☐ If the Power of Attorney commences on the incapacity of the donor, provide evidence of incapacity – Original or certified copy Medical Certificate (If the person has capacity, they need to sign this authority)

☐ If the person is deceased, evidence of death – Original or certified copy of Death Certificate

☐ If the person is deceased and O'Hearn Lawyers do not hold the last Will, original Will / Grant of probate / letters of administration

☐ Other evidence (if not within above categories): _____

3. IDENTIFICATION

Please provide or bring with you to collect the documents one original or certified copy of Primary ID for each person requesting the documents.

☐ Australian driver's licence OR ☐ Australian Passport OR ☐ NSW Photo Card

NOTE: A Certified copy means a photocopy of your ID certified by a solicitor, barrister, health professional registered with the Australian Health Practitioner Regulation Agency, Justice of the Peace (with a registration number), accountant or police officer. An uncertified photocopy is not sufficient.You can email certified ID. Alternatively, you can bring your original photo ID to O'Hearn Lawyers and we will certify. If you would like us to certify documents you will need to contact our office to arrange an appointment in the first instance.

4. DOCUMENTS REQUESTED

Please note we can only release original Wills to the Will maker, and documents which are held jointly on behalf of more than one person can only be released on the authority of all parties.

Please tick	Documents requested	Original	Certified	Not Certified	Number of copies
☐	Complete safe custody packet containing all original document(s) held in safe custody	☐	☐	☐	
☐	Most recent Will only / All Wills held by O'Hearn Lawyers (please cross out whichever option is not applicable)	☐	☐	☐	
☐	Most recent Enduring Power of Attorney / All Enduring Powers of Attorney held by O'Hearn Lawyers (please cross out whichever option is not applicable)	☐	☐	☐	
☐	Most recent Appointment of Enduring Guardian / All Appointments of Enduring Guardian held by O'Hearn Lawyers (please cross out whichever option is not applicable)	☐	☐	☐	
☐	Other documents: _____ _____	☐	☐	☐	

5. MODE OF COLLECTION

Choose one	Collection Method
☐	Personal collection from Wallsend office / Taylors Beach office (Please select)
☐	Email: _____
☐	Regular post (available for copies or certified copies of documents only)
☐	Express Post or Registered Post for original documents – Please supply a self-addressed A4 Express Post or Registered Post envelope for your original documents to be sent in.

6. URGENCY

Please also tick below if required urgently and provide details to assist us in prioritising your request

Urgent request (less than 5 business days) ☐

Details of urgency: _____

7. AUTHORITY TO COLLECT ON YOUR BEHALF

If you wish to authorise another person to collect documents on your behalf, please complete the below. That person will need to present their original photographic identification upon collection:

I/We, _____, authorise _____ to collect the documents requested herein by me/us.

8. AUTHORITY TO RELEASE

We/I warrant that we are/I am duly authorised to make this request for documents and hereby authorise O'Hearn Lawyers to release the requested documents:

	Person 1	*Person 2*
Signature		
Print Name		
Date:		

WHAT HAPPENS NEXT?

1. Once completed, please print and sign this form and email executed form to safecustody@ohlaw.com.au. If you cannot email the form, please call our office on 4951 8199 to make alternate arrangements.
2. We will **assess** your request within 5 business days.
3. Once assessed, if we have further requirements, we will contact you.
4. Once all requirements are met, we will arrange provision of the documents as per mode of collection selected above.

OFFICE USE ONLY:
Processing of request:
Date Request Received:
Does the request require additional information/documents? Y / N Date requested:
If so, have additional requirements been satisfied? Y / N Date:
Requested documents prepared by:
Staff Member Authorising Release of Documents: Date authorised: Signature:
Collection/Provision of Documents:
Name/s of person who collected/was provided with documents:
Copy of Identification of Person collecting documents taken: Y / N
Were the documents collected/provided the same as the documents requested above? Y / N
If no, what documents were provided:
Certified Copies or Original Documents Provided: Certified / Original
If original, has the person collecting signed to acknowledge receipt of the original documents: Y / N
Staff member who attended to provision of documents: Date: Signature:
Documents provided by: Email / Registered Post / Post / In person
Additional Notes: