



Requirements for Release of Documents

Attwood Marshall Lawyers will only release documents being held by us when we are satisfied with the following:

- 1 The person collecting the document and/or requesting the release of the document is the owner of the document. If a document is held with other parties or owned by other parties, then all parties must request the release of the document.
- 2 Attorneys requesting release of a principal's documents must satisfy the conditions imposed under the Enduring Power of Attorney. **In accordance with the direction of the Queensland Law Society, we will not release a principal's Will to an Attorney whilst the principal is alive.**
- 3 An original Will of a deceased person will only be released to the executors of the estate upon production of the official death certificate. If there is more than one executor appointed under the Will, all executors must make a written request for the release of the Will.
- 4 All documents are held in our Coolangatta office. Persons collecting their documents must collect them from our Coolangatta office at Suite 1, Level 2, The Strand, 72-80 Marine Parade, Coolangatta.

Our requirements to verifying a person's authority is set out in this document, however we reserve the right to impose any requirements we deem necessary on a case-by-case basis.

Identity

- We will require evidence of the identity of all relevant parties. Relevant parties include the owner(s) and the person(s) collecting the documents and an attorney.
- A valid driver's licence and/or passport are acceptable forms of identity. Other forms of identity will be considered on a case-by-case basis when a party does not hold a driver's licence and/or passport.
- Identity documents may be presented in person (at which time a copy will be taken and stored in our database) or scanned and emailed to us in high resolution full colour. Faxes are not acceptable due to their poor resolution.

Authority

- The owner of the document may collect their document or instruct us to give it to another person and/or law firm.
- Where a document is held by us for two or more parties, we will require all parties to authorise any release of the document.
- An attorney for the owner of the document may give instructions on behalf of the owner of the document. A declaration of non-revocation of their powers will be required, and satisfaction of any conditions under the Power of Attorney must be duly evidenced.
- Written authorities will only be accepted if they are unambiguous.
- An acknowledgement for receipt of the document must be signed and returned to us.

Delivery

- Documents may be collected in person from our **Coolangatta office** during normal business hours (8.30am-5.00pm). Please telephone our office on 07 5536 9777 at least 4 hours prior to attending in person, so that we can have everything ready for you. If we are holding a large number of documents on behalf of a person, we may require longer than 4 hours to have them ready for collection.
- Documents can not be immediately released without prior notice.
- You may arrange for a courier or duly authorised representative to collect the document from our Coolangatta office, provided the appropriate written authority and the identification requirements have been met.
- You may send us an appropriate sized express post prepaid self-addressed envelope and we will send the document by return. Our security clerk will advise you what size express post envelope will be appropriate. We accept no responsibility for any documents damaged, delayed and/or lost in the post.
- We will send the document to you by Australia Post registered post, upon payment of our postage and handling fee of \$50.00. Payment can be made to our accounts department via telephone (credit card phone authorisation) or by making your payment via our secure online payment portal at www.attwoodmarshall.com.au/make-a-payment/

Any fees or expenses due or outstanding must be paid on or before collection of documents.