



GO MARKETS

Deceased Estates Policy and Procedure

July 2023



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1. Overview

The GO Markets Pty Ltd (GO Markets) Deceased Estates Policy and Procedure (“Policy”) is designed to provide practical help with the process for the release of trading account funds after the death of the account holder.

2. Notifying us

Please notify us as soon as possible. You can inform us by phone call, email, or letter. Our contact details are as follows:

Address: GO Markets Pty Ltd
Level 11, 447 Collins Street
Melbourne, Victoria 3000

Telephone: +61 3 8566 7680

Email: support@gomarkets.com

As soon as we are notified, we will freeze any sole accounts that person had with us. Joint accounts will continue to operate as normal. Once all documents listed below have been received, we will transfer the account into the joint holder’s name, keeping the same account number.

Where the deceased has an active account with an open position/s, we will close the position/s once all documents listed below have been received. The profit realised (if any) on the trade will be posted on the trading account. If the open position/s are of a material value, we will seek confirmation from the Executors of the Estate to close the position.

3. Documents required.

In order to release the funds of the trading account we require the following documentation/ information:

1. Certified copy of the will,
2. Certified copy of the death certificate,
3. Certified copy of the Grant of Probate (if applicable),
4. Proof of your identity (as executor of the will), in the form of a certified copy of a valid passport or drivers’ licence, and
5. Details of the account which the funds are to be transferred to.

4. Timeframe

Once we have received all the required documentation/ information set out above, the transfer will endeavour to process the transaction within **5 business days**.



Please note that the submission of incomplete documentation/ information will result in a delay to the release of funds.

5. Account closure

Once the funds have been released, the account will be closed if it is in a sole name.

6. Key contact

Please contact the Support Team @ support@gomarkets.com should you have any questions about this policy.