

Requirements: Release of Original Documents



Coastal *Law Group*

W E L C O M E

We take our responsibility to securely store and protect your original documents very seriously.

Before we can release any original documents, you (or your authorised representative) must satisfy the requirements set out in this guide.

Coastal Law Group



QUICK CHECKLIST

Requirements for the release of document



- ☐ Signed authority completed?
- ☐ Certified identification provided?
- ☐ One business day's notice provided (if collecting original documents)?
- ☐ Express post envelope supplied or administration and postage fee paid?
- ☐ Certified copy of Enduring Power of Attorney provided (if applicable)?

REQUIREMENTS FOR RELEASE OF DOCUMENTS



We can only release original documents once we are satisfied that the following requirements have been met.

- 01** The person collecting the documents or requesting the release of the documents is the owner(s) of the documents. If a document is held with either parties or owned by other parties, then all parties must request the release of the document.
- 02** Attorneys requesting the 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.
- 03** An original Will of a deceased person will only be released to the executor/s 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 release of the Will.
- 04** Persons collecting their documents must collect from our Robina office located at 107/137 Laver Drive, Robina Qld 4226.

We reserve the right to require any additional information or documentation reasonably necessary to verify a person's authority before releasing original documents.

IDENTITY REQUIREMENTS



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.

- 01** A valid and current driver licence or passport are acceptable forms of identification.
- 02** Other forms of identification will be considered on a case-by-case basis when a party does not hold a valid and current driver licence or passport.
- 03** Identity documents may be presented in person at our office in Robina (at which time a copy will be taken and stored in our database) or emailed to us in high resolution full colour.

AUTHORITY



- 01 The owner(s) of the documents may collect their documents or instruct us to give them to another person or law firm.
- 02 Where a document is held by us for two or more parties, we will require all parties to authorise any release of the document.
- 03 An attorney for the owner(s) of the document may give instructions on behalf of the owner(s) 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.
- 04 Written authorities will only be accepted if they are unambiguous. For an example of an acceptable written authority, please see pages 8 and 9.
- 05 An acknowledgement for receipt of the document must be signed and returned to us.

DELIVERY



- 01 Documents may be collected in person from our Robina office during normal business hours (being 9am to 5pm, Monday to Friday)
- 02 If collecting documents from our Robina office, please phone our office on 07 5646 6292 at least one business day prior to attending our office, so we can ensure that we have your documents ready for your collection. **We are not able to release documents without prior notice.**
- 03 You may arrange for a courier or duly authorised representative to collect the documents from our Robina office, provided the appropriate written authority and the identification requirements have been met.
- 04 You may send us an appropriate sized express post pre-paid envelope and we will send the documents by return. Please contact our office on 07 5646 6292 so that we may advise what size express post envelope will be appropriate for your documents. We take no responsibility for any documents that are damaged, delayed, or lost in the post.
- 05 We will send the documents to you by Australia Post registered post, upon payment of our postage and handling fee of \$40 including GST. Payment can be arranged with our accounts team, which can be contacted on 07 5646 6292.
- 06 Any fees or expenses due or outstanding to us must be paid on or before collection of documents.

EXAMPLE: WRITTEN AUTHORITY

*Where you are collecting your **own** original documents*

Authority to Release Documents

Client/s Details (your details)

Name:

Address:

Phone Number:

Email:

[I/we] attach a certified copy of [my/our] identification documents.

Authority

[I/we] hereby irrevocably authorise and direct Coastal Law Group of 107/137 Laver Drive, Robina in Queensland to release and provide to [me/us] all original documents held by Coastal Law Group on [my/our] behalf ("Documents").

Execution

[each person listed as a client must sign and date this document]

Tip! Don't forget to include a certified copy of the identification documents for each client – ideally being a current and valid driver licence or passport.

EXAMPLE: WRITTEN AUTHORITY

Where you are requesting for your original documents to be transferred to another law firm

Authority to Release Documents

Client/s Details (your details)

Name:

Address:

Phone Number:

Email:

[I/we] attach a certified copy of [my/our] identification documents.

Authority

[I/we] hereby irrevocably authorise and direct Coastal Law Group of 107/137 Laver Drive, Robina in Queensland to release and provide to [insert name and address of new law firm], all original documents held by Coastal Law Group on [my/our] behalf ("Documents").

[I/we] specifically authorise Coastal Law Group to:

1. provide [my/our] Documents to [insert name of new law firm]; and
2. communicate directly with [insert name of new law firm] regarding the transfer of my Documents.

Privacy Consent

[I/we] consent to the collection, use and disclosure of [my/our] personal information as reasonably necessary to facilitate the transfer of [my/our] Documents from Coastal Law Group to [insert name of new law firm].

Execution

[each person listed as a client must sign and date this document]

Tip! Don't forget to include a certified copy of the identification documents for each client – ideally being a current and valid driver licence and passport.



HAVE QUESTIONS?



Get in touch with us, we'd love to help!

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