

Survivorship-Joint Tenants

A guide to preparing the documents





Preparing a Survivorship Application – Joint Tenants

This step-by-step guide is designed to show you how to prepare and lodge a simple survivorship application upon the death of one or more proprietors, who are shown on the title as joint tenants.

This type of application should only be made:

- Where the Certificate of Title states the proprietors as joint tenants
- Where joint tenancy is deemed as no reference is shown in the registered proprietor's section of the title.

If you are completing the forms yourself, we advise you to exercise care as the documents involved are legally binding. A competent professional, such as a solicitor or settlement agent, should always be considered when preparing any land transaction document.

It is important to read through the whole of this information guide. Being familiar with the important information provided in the guide will assist if you need to contact Landgate to clarify any part of the process. Useful contacts are listed on the back page.

What you should know about a Certificate of Title

Certificates of Title are created by Landgate usually as a result of registration or approval of a subdivisional plan. Original titles are always kept at Landgate.

Some limitations or encumbrances may prevent the registration of a transfer or other interests on a Certificate of Title. For this reason, it is recommended that a copy of the Certificate of Title be obtained from Landgate, to assist in completing the Transfer of Land form. We commonly refer to this as a 'title search'. A title search will show the spelling of the names of the registered proprietors/owners.

For a fee, you can conduct a title search and obtain a copy of a Record of Certificate of Title.

What if all owners who are registered on the Certificate of Title as joint tenants are deceased and the title was not updated when the first joint tenant died?

When this has occurred, two documents need to be lodged together at Landgate:

- 1. A Survivorship Application, and
- 2. An Application by Personal Representative

The process to change ownership is explained in the Landgate How to Guide entitled 'Joint tenants both deceased'.

What do I need for my application?

- Verification of Identity (VOI) the identity of the person(s) signing as applicant(s) must be verified
- Evidence of death of the deceased joint tenant
- Title Search (recommended) used to complete the application and statutory declaration forms
- Forms: <u>Application by Survivor e-form</u> (or paper <u>Form A2</u> and <u>Statutory</u> <u>Declaration</u> (B3))
- Registration Fees payable to Landgate

Verification of Identity (VOI) - Identifying the applicant

All natural person/s signing the application document are required to have their identity verified by an independent party in line with <u>Landgate's VOI practice</u>.

When opting for professional representation they will complete the Verification of Identity on your behalf and will lodge the land transaction/s. If the land transactions are returned to you to self-lodge, you will be considered as self-represented and will not be able to use the VOI Statement provided by the industry profession. Lodgement may also be refused.

If opting for self-representation, you are required to download the Verification of Identity Form – Self-Represented Party (Western Australia) from policy and procedure guide <u>VOI-02</u> <u>Western Australian Registrar and Commissioner of Titles Joint Practice: Verification of Identity and Authority. Paper Based Transactions – How to Complete a Verification of Identity. The form is not available at Australia Post outlets.</u>

Once you have attended a participating outlet and you have your receipt, you can complete the VOI Statutory declaration that will accompany the Transfer of Land.

• Persons residing overseas cannot be self-represented party and must seek professional representation.

Evidence of Death

This is usually provided by producing the **original** death certificate that has been issued from the office of the Registrar of Births, Deaths and Marriages. An **original** probate document issued by the Probate Office is also acceptable as evidence for the application.

A copy of the death certificate or probate document certified by a Justice of the Peace or a similarly qualified person is not acceptable.

Landgate is required to sight the original death certificate or original probate document. If the application is lodged in person, the original evidence will be returned at the time of lodgement. If the application is posted to Landgate, the original evidence will be returned to the customer with their receipt. A copy certified by Australia Post, a licensed settlement agent or a legal practitioner will also be accepted (refer to Land Transactions Policy and Procedure Guide DOC-04 Statutory Declarations and Supporting Evidence).

Title Search – A copy of the current Certificate of Title

A title search is optional, however highly recommended, as the search provides you with a complete up-to-date copy of the title at the date and time the title search is conducted.

For a fee, you can conduct a title search online and obtain a copy of a Record of Certificate of Title.

Survivorship Application Form and a Statutory Declaration Form B3

All freehold land registration forms are available online via Landgate's <u>Land Titling Forms</u> page, or from a Landgate office. Those specific to this application are:

- Application by Survivor e-form or
- Paper Form A2 and Statutory Declaration Form B3

Please note that only original signed forms can be lodged for registration and all forms must be printed on white A4 size paper in duplex style, so both sides of the paper are printed upon.

Registration Fees

View the current <u>Registration and Search Fees</u> that can be paid by cash, credit card, EFTPOS, or by cheque/money order made payable to **Landgate**. Fee must be paid when lodging the document in person or included if posting the documents to Landgate.

Further Reading

For further information on this transaction type and further document requirements, please see the following links:

- Land Titles Registration Policy and Procedure Guides
- A Guide to basic requirements for the preparation of paper documents "Getting it Right Reference Guide".
- Land Transaction Hub

Steps to lodging an application

- 1. Complete the application and statutory declaration forms by using the title search. Type or print legibly in dark ink (preferably black) to complete the application and statutory declaration forms, using the examples in this guide to assist.
- 2. Provide proof of death of the deceased joint tenant. This is usually provided by production the original death certificate that has been issued from the Office of the Registrar or Births, Deaths and Marriages. An original probate document issued by the Probate Office is also acceptable as evidence for the application.
- 3. The original verification of identity receipt issued by Australia Post must be produced and lodged with the application document.
- 4. Registration fees will need to be paid when the document is presented for lodgement, documents cannot be accepted without fee payment. Payments over the counter are available by cheque/money order, credit card or cash. If posting document/s to Landgate it is important to include any registration fee payable. Please feel free to use our <u>Postal Lodgement</u> <u>Coversheet</u> which enables you to review and select one of the payment options available.
- 5. Lodge the original signed application and statutory declaration forms, along with any other evidence that may be required. **Ensure the registration fee payment is enclosed if lodging by post**.
 - In person at one of Landgate's lodgement offices. NOTE: Any person can lodge the application document with Landgate; the lodging party does not need to be one of the persons named in the application.
 - By post to:

 Landgate Document Lodgement Section
 PO Box 2222
 MIDLAND WA 6936

NOTE: Original evidence being returned by post will be posted in the normal mail. If you wish to have the original evidence returned by registered post, you will need to provide a self-addressed, pre-paid registered post envelope to Landgate with the application document.

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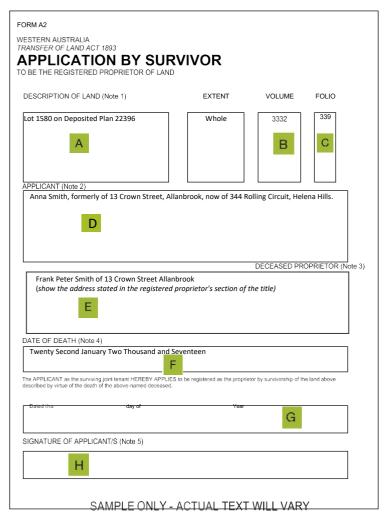
Important

The information in this document should not be regarded as legal advice. In all matters, users should seek legal advice from an independent legal practitioner.



This example is for paper forms only. Please refer to Landgate's **Land Titling Forms** page for the equivalent e-form.

- A To be copied from Certificate of Title
 B To be copied from Certificate of Title
 C To be copied from Certificate of Title
 D Full name and address of Applicant
- Full name and address of deceased as shown on Certificate of Title
- F Date of death state in words
- G Date application signed
- H Signature of applicant (no witness required)



Completing the Statutory Declaration

A Statutory Declaration is required by any person making the Application by Survivor. Where there is more than one surviving joint tenant, the Statutory Declaration only needs to be completed by one of the survivors. The following should be included:

- Identification of the land by its volume/folio reference taken from your Certificate of Title. See B and C on sample title.
- Name of deceased tenant/s and reference to proof of death supplied, either Death Certificate or Grant of Probate.
- Your entitlement to the land by survivorship.

FORM 83
WESTERN AUSTRALIA
TRANSFER OF LAND ACT 1893 AS AMENDED
ORTHS, AFFIDAVITS AND STATUTORY DECLARATIONS ACT 2005

STATUTORY DECLARATION

A I, Anna Smith of 344 Rolling Circuit, Helena Hills, Fitness Trainer.

(name, address, and occupation of person(s) making the declaration)

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I am one of the proprietors of the land being Lot 1580 on Deposited Plan 22396 being the whole of the land comprised in Certificate of Title Volume 3332 Folio 339, where I am described at my former address of 13 Crown Street, Allanbrook.

I now reside at 344 Rolling Circuit Helena Hills.

On 22 January 2017, my co-proprietor Frank Peter Smith died and produced with this declaration is a certified copy of the original death certificate

The person shown as Frank Peter Smith of 13 Crown Street, Allanbrook on Certificate of Title Volume 3332 Folio 339 is one and the same person as Frank Peter Smith described on the death certificate.

The joint tenancy with the deceased proprietor of the land described above had not been severed at the date of death of the deceased proprietor.

I make this declaration in support of my application to be registered as the sole proprietor of the land in Certificate of Title Volume 3332 Folio 339 by survivorship

This declaration is true, and I / WE know that it is an offence to make a declaration knowing that it is false in a material particular. This declaration is made under the Oaths. Attidavits and Statutory Declarations Act 2005 at {place} on day of 20 by-

Signature of person making the declaration (sign in the space above) In the presence

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Signature of authorised witness (sign in the space above)

Full name, address and occupation of declarant(s)

B Enter relevant details as required

State full name and address of deceased proprietor/owner as show on the Certificate of Title and also include full name of deceased as shown on Death Certificate of Grant of Probate

D Date to be shown

Signature of Declarant(s)

Signature of witnesses (Checklist of competent witness on the back of the Statutory Declaration form **before** signing. Print name, address, occupation and/or competency of witness

SAMPLE ONLY, ACTUAL TEXT WILL VARY

Contact List

Landgate Contacts

Landgate Office Hours 8.30am to 4.30pm (Lodgement Hours 8.30am to 4.30pm

Landgate – Midland Head Office 1 Midland Square **MIDLAND WA 6056**

TEL +61 (0)8 9273 7373

Email: customerservice@landgate.wa.gov.au

Website: www.landgate.wa.gov.au

Postal Address: PO box 2222, MIDLAND WA

6936

Document Lodgement Sites

Document lodgement hours strictly 8.30am to 4.30pm

Landgate - Midland Head Office

1 Midland Square MIDLAND WA 6056

Landgate – Perth Business Office

200 St Georges Terrace PERTH WA 6000

Other Useful Contacts

Department of Finance Revenue WA

3rd Floor, 200 St George Terrace

PERTH WA 6000

Tel: +61 (0)8 9262 1100 Website: www.wa.gov.au

Department of Planning

140 William Street PERTH WA 6000

Tel: +61 (0)8 6551 9000

Website: www.planning.wa.gov.au

Family Court

150 Terrace Road PERTH WA 6000

Tel: +61 (0)8 9224 8222

Website: www.familvcourt.wa.gov.au

Probate Office

11th Floor, 28 Barrack Street

PERTH WA 6000

Tel: +61 (0)8 9421 5152

Website: www.supremecourt.wa.gov.au

Registry of Births, Deaths and Marriages

141 St Georges Terrace PERTH WA 6000

Tel: +61 1300 305 021

Website: www.bdm.dotag.wa.gov.au

State Administrative Tribunal

6th Floor 565 Hay Street

PERTH WA 6000

Tel: +61(0)8 9219 3111

Website: www.sat.justice.wa.gov.au

