



DECEASED ESTATE STOCKBROKING

JM Investments is a family-owned specialist in the Discovery, Sale, or Transfer of shares in a deceased estate. Our unique Blind Share Search offering has found millions of dollars of lost shares and dividends for Australian Estates.

AVAILABLE SERVICES

- **Selling shares in an estate** (1% with a \$150 minimum per share + GST).
**Over \$100k the fee drops to 0.9%, over \$1m to 0.85%, over \$1.5m to 0.65%.*
- **Transferring shares in an estate** (\$150 per share, per beneficiary +GST).
**For estates with 10+ transfers the fee is \$110 per transfer.*
- **Unpaid dividend release** \$35 + GST per Registry.
- **Blind share search** (\$250 + GST).
- **CGT/Cost Base Report** From \$200 + GST
- **Unclaimed money claim** \$200 + GST per register. Second register \$100, additional registers \$50 each.

The JM Investments team performs all administrative work. You and your clients will be speaking with a trained lifeline counsellor, so you can be sure to be met with care and empathy, even in the most complex cases.

THE PROCESS

1. Provide details of the estate and shareholdings via email.
2. Pre-filled application forms are sent to be signed and scanned back.
3. Shareholdings are checked, dividends are audited, and any searches are completed.
4. Shares can be sold or transferred.

Email: info@jminvest.com.au | Phone: 07 5641 1700 | Website: jminvest.com.au

JM Investments & Advisory is a Corporate Authorised Representative #1295954 of BR Securities Pty Ltd AFSL # 456663



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REQUIRED DOCUMENTS

For A Share Sale

- Probate certified within 3 months.
- Executor IDs certified within 3 months + Executor contact details.
- Shareholding details.
- Letter of instruction with Trust bank details on your letterhead.

For A Share Transfer

- All the details required for a share sale (above).
- Beneficiary ID's Certified within 3 months.
- Beneficiary bank statement.

For The Blind Share Search

- All potential names of the shareholders, companies, or trusts. including possible salutations. E.g. Mr John Mathew Smith, Dr John Mathew Smith...
- Date of birth.
- Current and previous addresses, including any property or building names, Accountant or Solicitor's addresses.
- Any information on the shares, other shareholdings, or why the client suspects shares were held.

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