



GO MARKETS

Deceased Estates Policy and Procedure

September 2024



Contents

1. Overview	3
2. Notifying us.....	3
3. Documents required.	3
4. Timeframe	4
5. Account closure	4
6. Key contact.....	4



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 releasing trading account funds after the death of an account holder.

2. Notifying us

The first step is to notify us as soon as possible. You can inform us via phone, 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

Upon notification of the account holder's death, we will promptly freeze any sole accounts held by the deceased. Joint accounts will remain operational. Once we have received all required documents, we will transfer the account into the name of the surviving joint holder while retaining the same account number.

For accounts with open positions, we will close these positions once all necessary documents have been provided. Any profit realized from these trades will be credited to the trading account. If the open positions are of significant value, we will seek confirmation from the Executors of the Estate before proceeding with the closure of these positions.

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

Upon receipt of all required documentation and information, we will aim to process the transfer within 5 business days.

Please be aware that submitting incomplete documentation or information may cause delays in 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.