

PUBLIC TRUSTEE'S OFFICE (PTO)

Administration of Deceased's Estate

(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)

User Guide for E-Service Submission

https://eservices.mlaw.gov.sg/pto

Last updated on 27 Dec 2021

(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



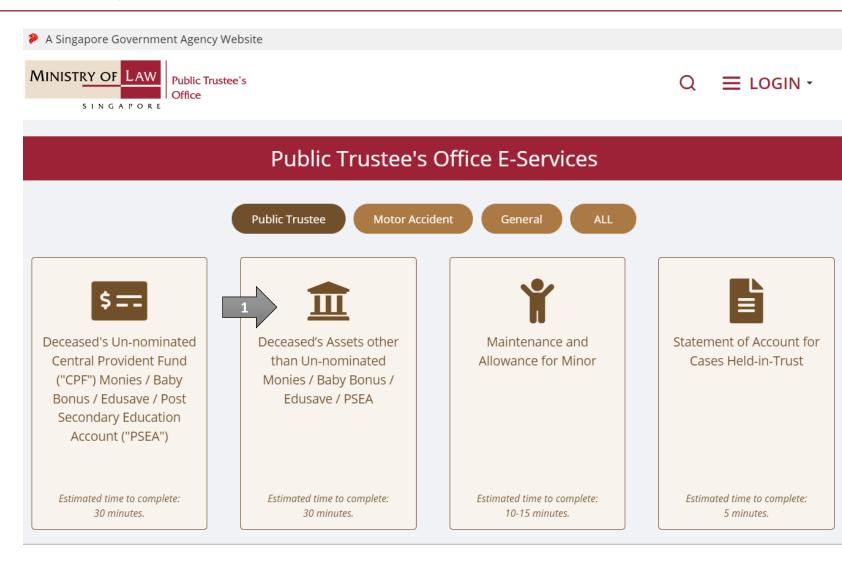
General Information

- The application to the Public Trustee's Office for the administration of a deceased's estate is via an online E-Service. The types of assets to be administered may include shares, personal bank account (above \$5,000), death gratuity, insurance policies, fully paid-up vehicles, unpaid salary, items in safe deposit box, compensation from government agencies, money from the Workfare Income Supplement Scheme, etc.
- 2) Please ensure that you access the E-Service using the latest versions of Chrome, Microsoft Edge or Safari.
- 3) You may click the **Save** button to save your application for up to 7 calendar days. You may also click on the left menu item to navigate to the specific page.
- 4) You may click on \neg Arrow Down icon to select from a dropdown or click on the box to filter the options.
- 5) You may input a date field using the $\stackrel{\blacksquare}{\blacksquare}$ Calendar icon to select a date.
- 6) Upon the successful submission, you will receive an acknowledgement via email. Thereafter, you can login to check on the application status in the **Dashboard** page under the **Processing** tab.

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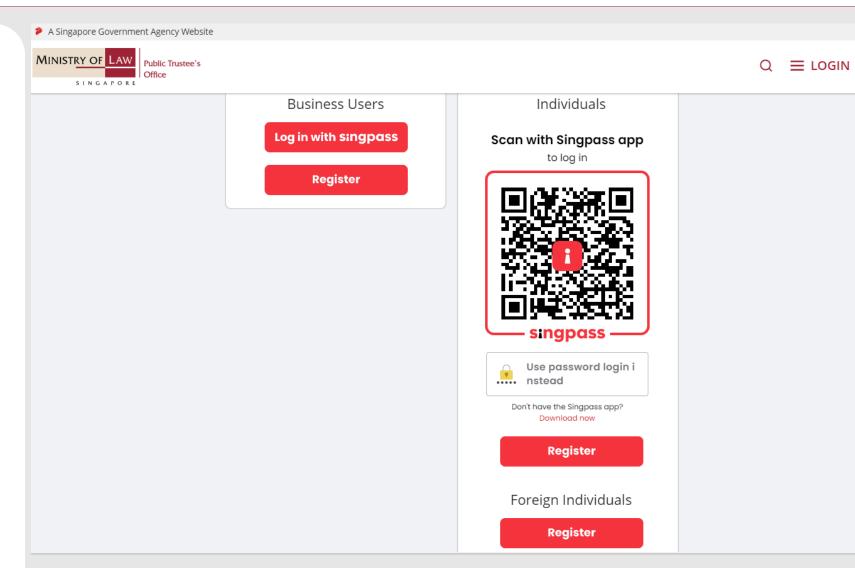
To begin, click on the E-Service application for **Deceased's Assets** other than Un-nominated Monies / Baby Bonus / Edusave / PSEA.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)

Proceed to log in with your selected log-in option.

If you do not have Singpass, please click on the 'Register' button to sign up for an account accordingly i.e. business user / individuals / foreign individuals. Otherwise, you will not be able to proceed with the online application.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)

Provide permission for Singpass to retrieve and pre-fill information for the online application by clicking I Agree.

singpass

Singpass retrieves personal data from relevant government agencies to pre-fill the relevant fields, making digital transactions faster and more convenient.

This digital service is requesting the following information from Singpass, for the purpose of form filling.

- > NRIC/FIN
- > Name
- Date of Birth
- > Residential Status
- Nationality
- Registered Address
- > Email
- Mobile Number
- > Marital Status
- > Last Marriage Date
- Country of Marriage

Clicking the "I Agree" button permits this digital service to retrieve your data based on the Terms of Use.

Cancel



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



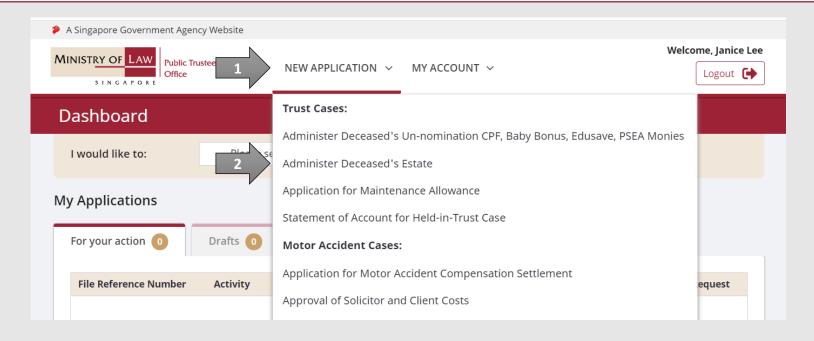
1. After you have logged in to the PTO E-Service Portal:

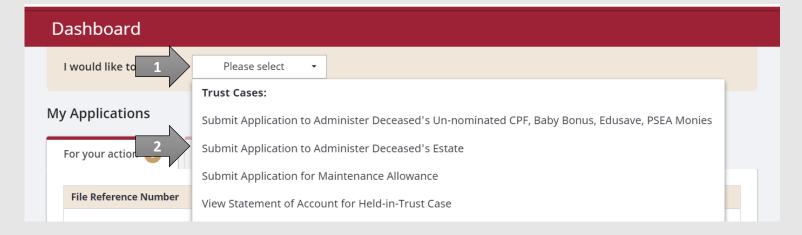
From the top menu, click on **NEW APPLICATION** and select the **Administer Deceased's Estate** menu item.

OR

From the **Dashboard** page, select **I would like to** and select **Submit Application to Administer Deceased's Estate**.

Note: Page is not applicable for users who login the first time.

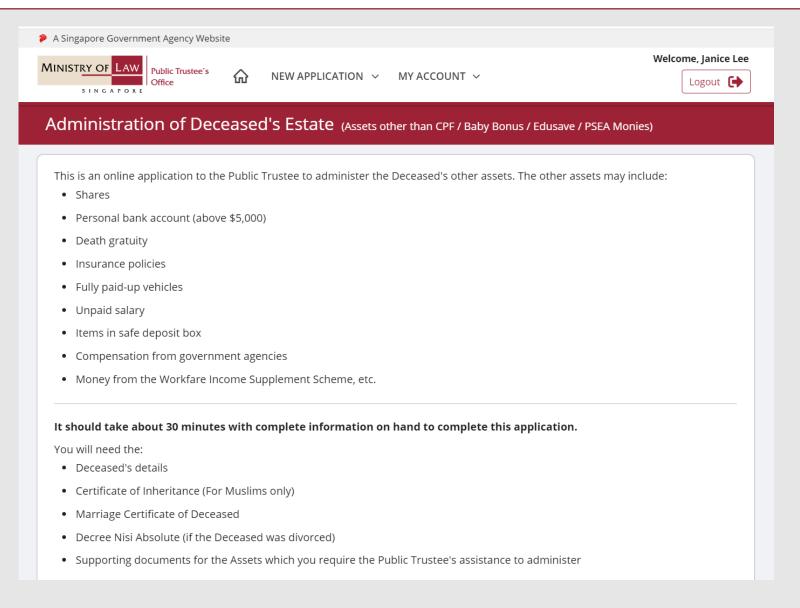




(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



2. Read the notes carefully.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



Click on the Proceed button.

Additionally, you may want to prepare the following relevant information as needed.

- Claimant's details (if there is a claim for funeral reimbursement, if different from beneficiaries)
- Beneficiaries' details (e.g. spouse, children, parent, etc.)
- Death Certificate of Deceased (If Deceased passed away outside Singapore)
- Birth Certificate of Deceased
- Birth Certificate of Beneficiary(ies) (If Beneficiary(ies) is/are Deceased's child(ren) or sibling(s))
- Identification Document of Beneficiary(ies)
- Death Certificate of Beneficiary(ies) (if Deceased)
- Marriage Certificate of Deceased's Parents
- Death Certificate of Parent(s) (if Deceased)

Maximum file size submitted must not exceed 5 MB individually.



APPLICATION FORM
Submit or edit your application form.



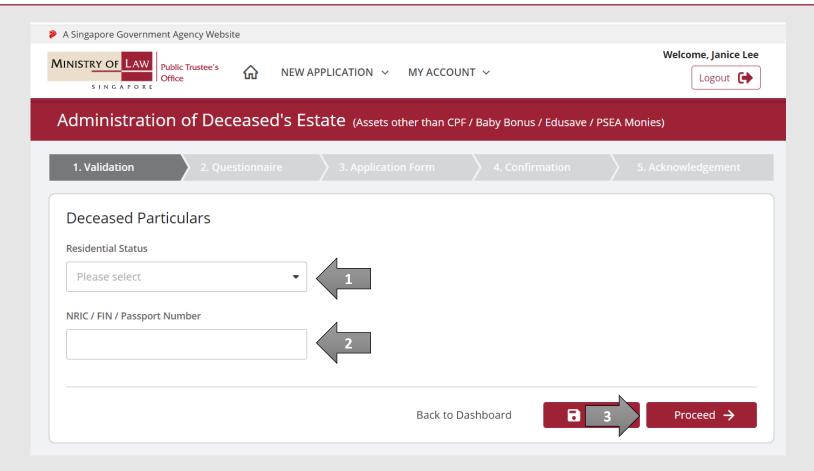
(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



Select the Residential Status and enter the NRIC / FIN / Passport Number of the deceased.

AND

Click on the **Proceed** button.

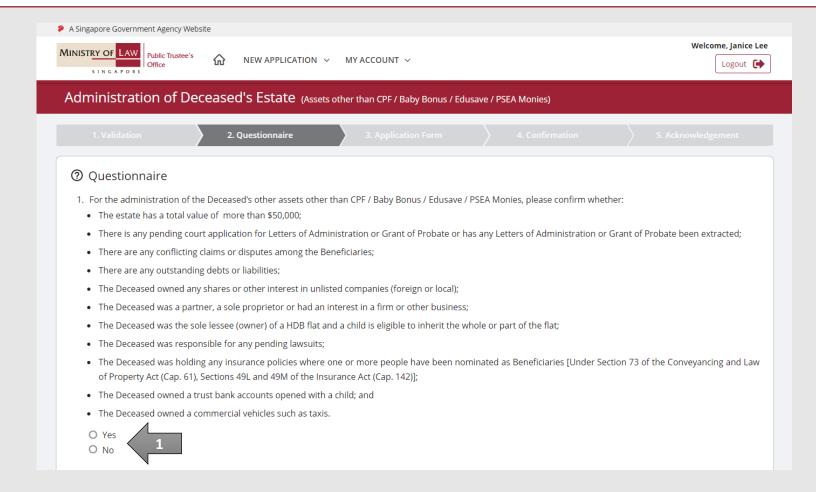


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



5. Review the conditions provided in the **Questionnaire** and select either **Yes** or **No**.

If **Yes**, you will not be able to proceed further as the Public Trustee will not be able to assist in the administration of the estate.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



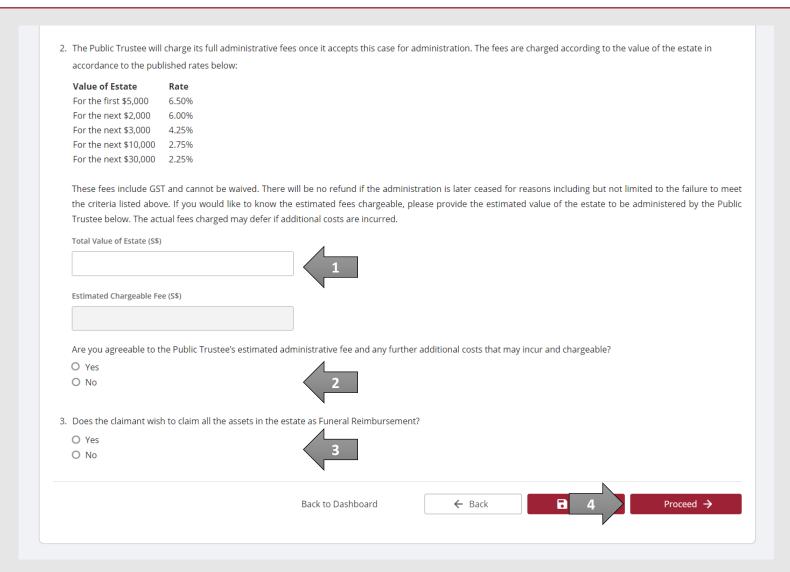
6. Enter the **Total Value of Estate**(S\$) and review the **Estimated**Chargeable Fee (S\$) calculated by the system.

Select either **Yes** or **No** on whether you are agreeable to the administrative fee and costs.

If the total value of the Estate is below \$6,000, Qn. 3 will appear. Select either **Yes** or **No** on whether the claimant wishes to claim all the assets in the estate as Funeral Reimbursement.

AND

Click on the **Proceed** button.

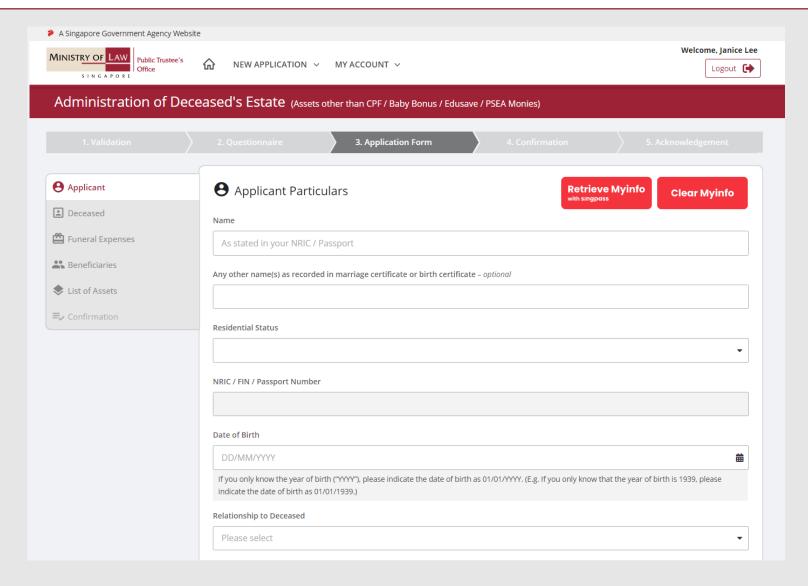


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



 Enter the Applicant Particulars information.

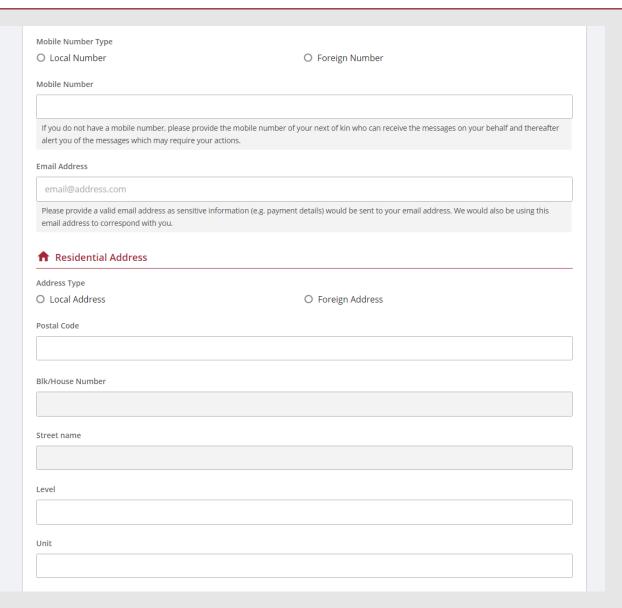
You may click on the Retrieve
MyInfo button to populate
your personal information
from MyInfo, or click on the
Clear MyInfo to clear MyInfo
information if you would like
to input the information.







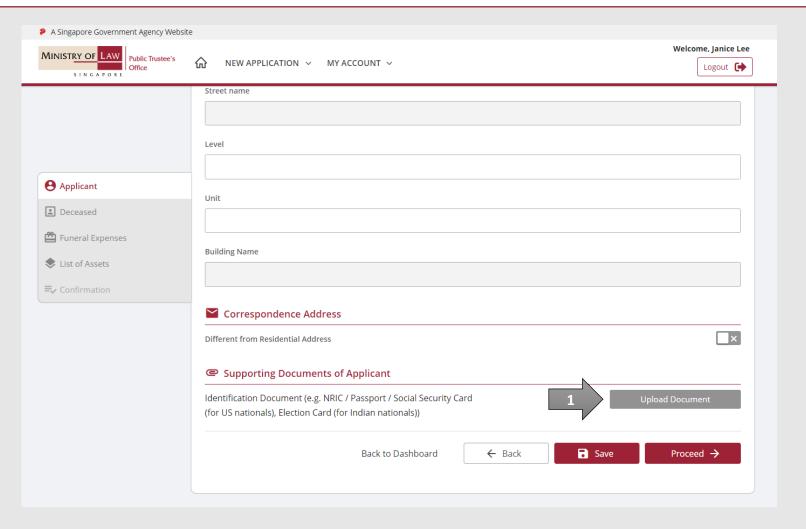
 Continue to enter the Applicant Particulars information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



Click on the Upload
 Document button to provide the required Supporting Documents.



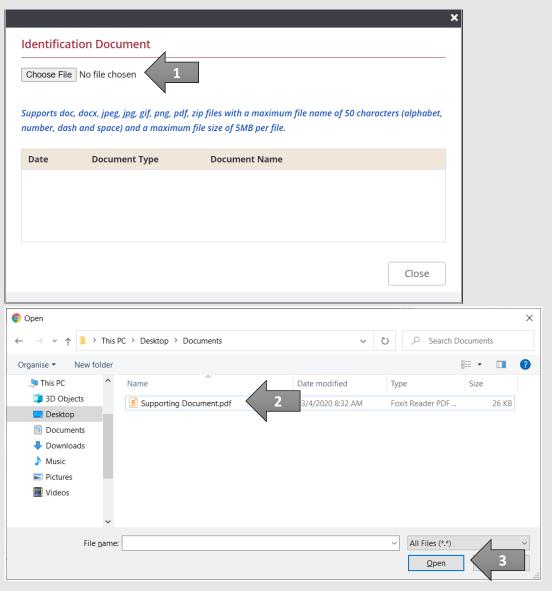
(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



10. Click on the Choose File button to select a document to be uploaded, select the document and click on the Open button to upload the selected file.

AND

Click on the Close button.



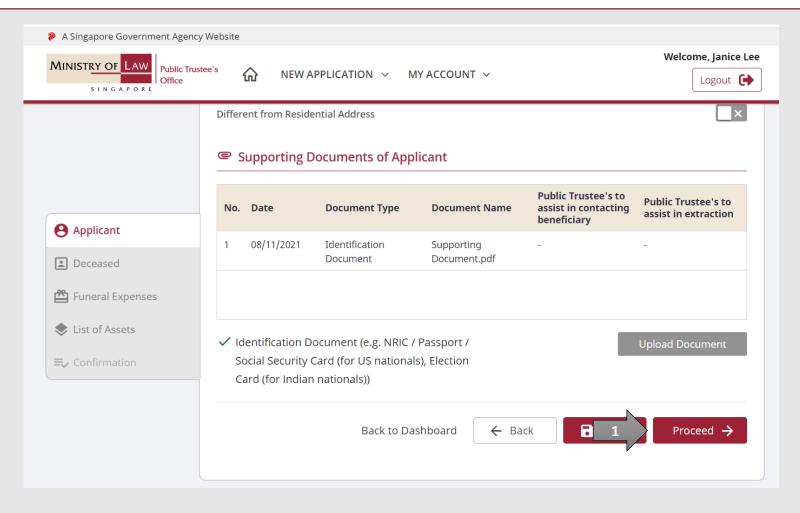
(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



11. Verify the Supporting Documents.

AND

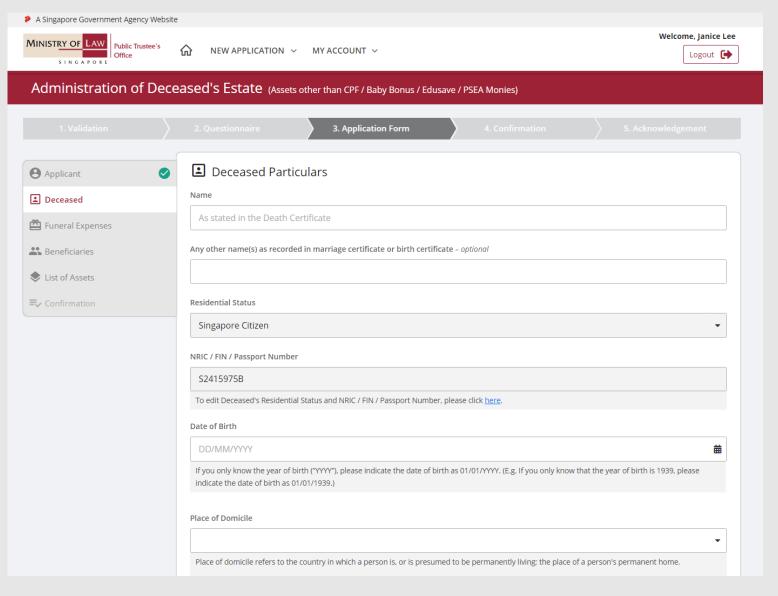
Click on the **Proceed** button.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



12. Enter the **Deceased Particulars** information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



13. Upload the required

Supporting Documents of

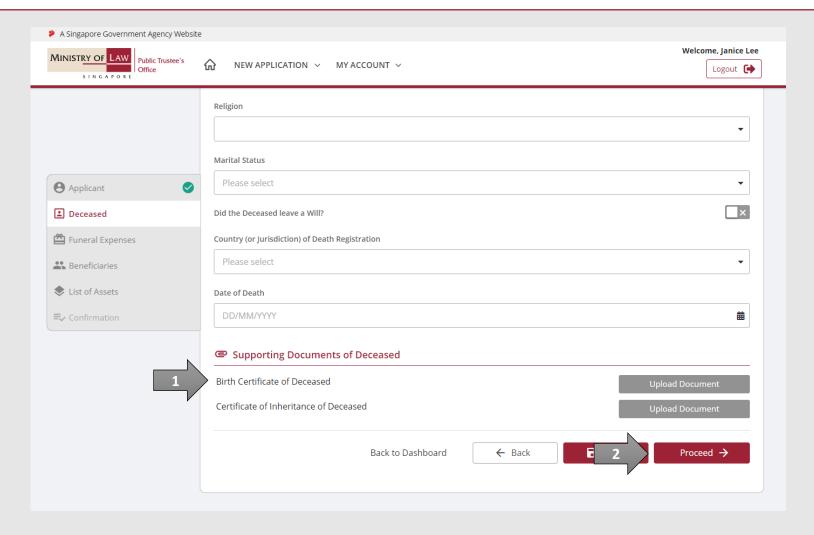
Deceased.

Please refer to Steps 9 – 10 (page 14 – 15) if you are not sure how to upload a document.

Verify the Supporting Documents.

AND

Click on the **Proceed** button.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)

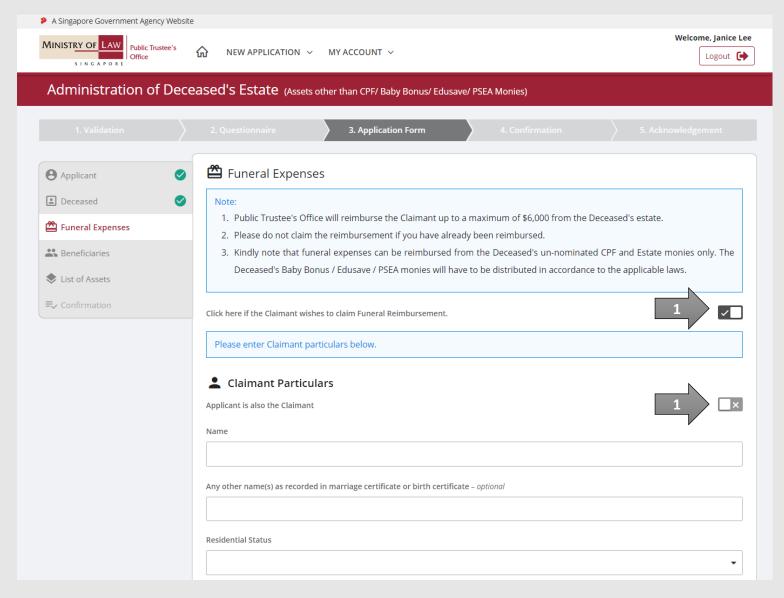


14. If a Next-of-kin would like to claim for reimbursement of funeral expenses from the Deceased's Estate, turn on the option Click here if the Claimant wishes to claim Funeral Reimbursement to enter Claimant Particulars.

Turn on the next option if the **Applicant is also the Claimant**.

OR

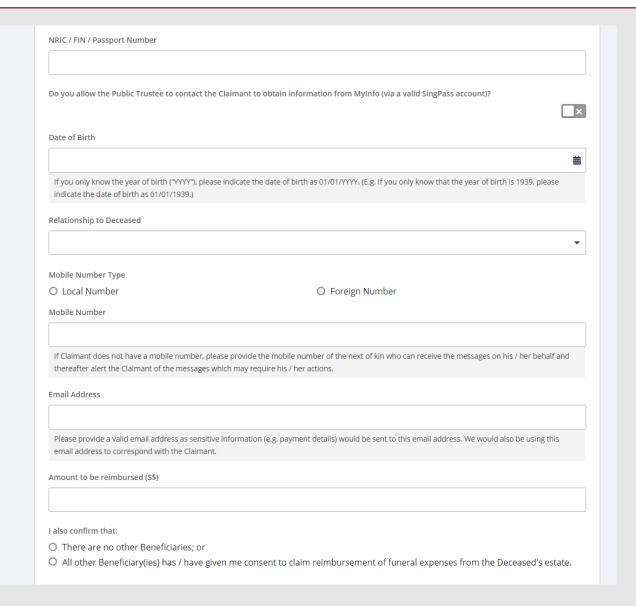
Enter the **Claimant Particulars** information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



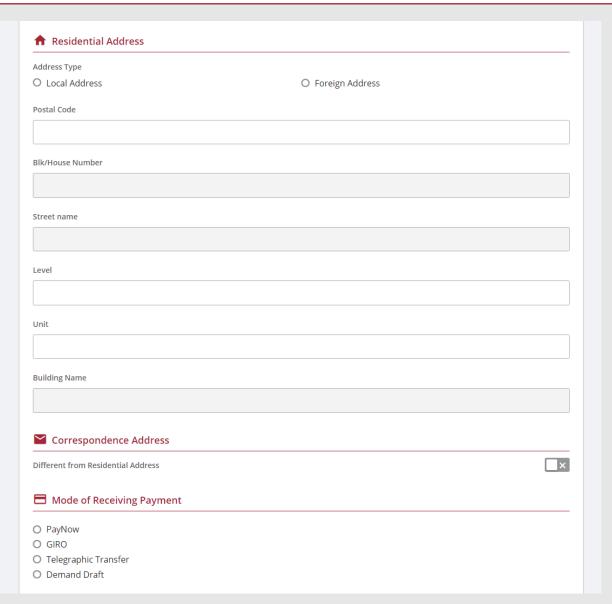
15. Continue to enter the **Claimant Particulars** information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



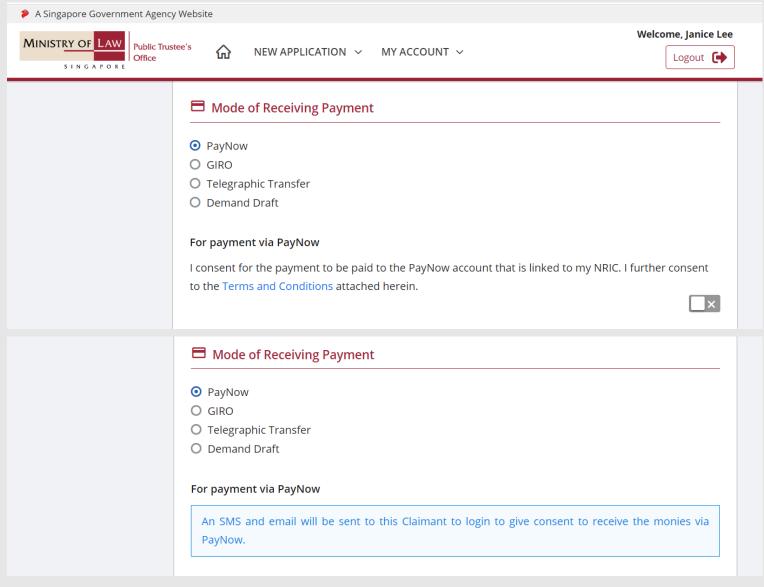
16. Continue to enter the Claimant Particulars information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



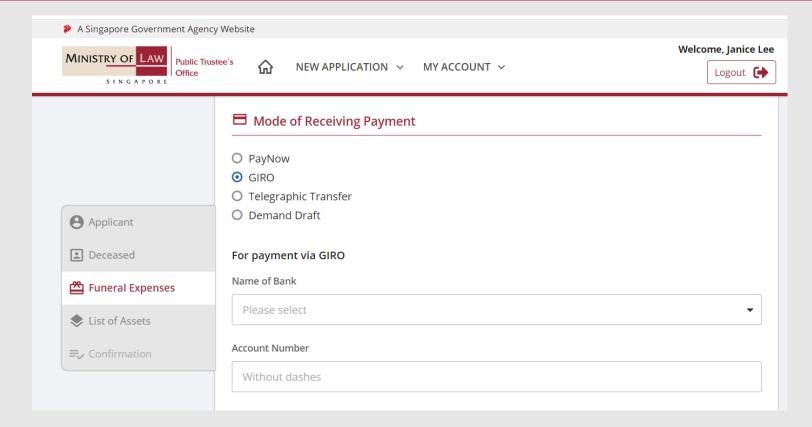
PayNow, the Claimant will be required to give consent. If the Claimant is not the Applicant, the Claimant will receive a SMS and email to request that he / she logs in to the system to provide his / her consent.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



18. For receiving payment via **GIRO**, continue to enter the required bank information.

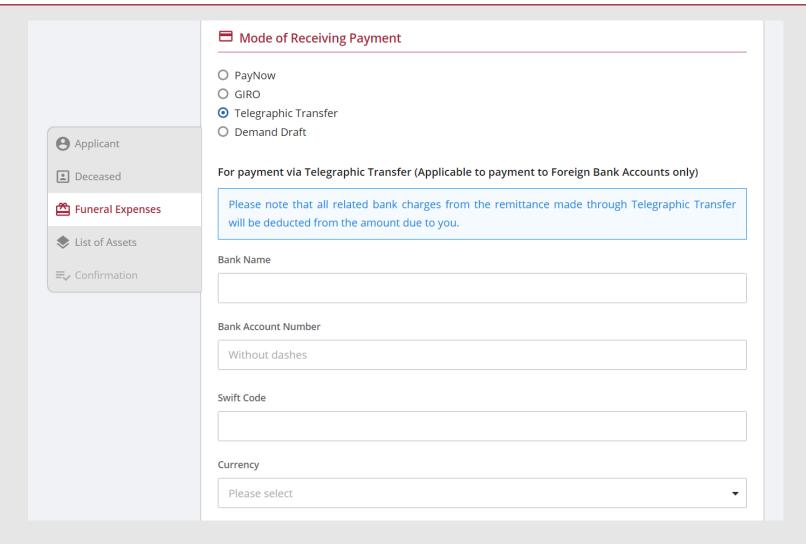


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



19. For receiving payment via

Telegraphic Transfer, continue
to enter the required bank
information.

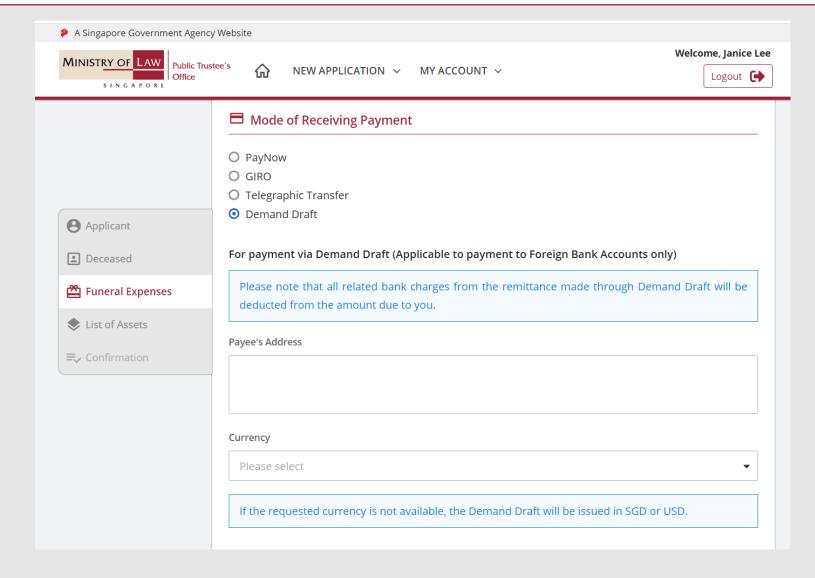


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



20. For receiving payment via

Demand Draft, continue to
enter the required payee
information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



21. Continue to enter the

Claimant Particulars

information and upload the

Supporting Documents of

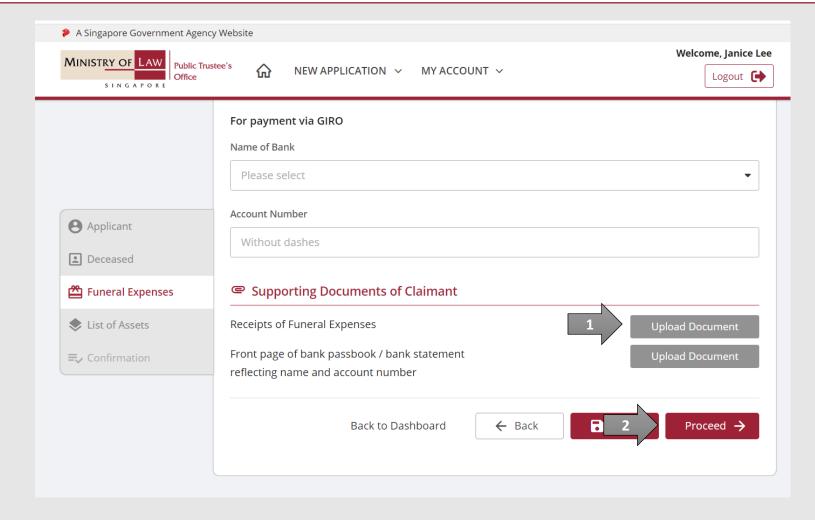
Claimant.

Please refer to Steps 9 – 10 (page 14 – 15) if you are not sure how to upload a document.

Verify the Supporting Documents.

AND

Click on the **Proceed** button.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)

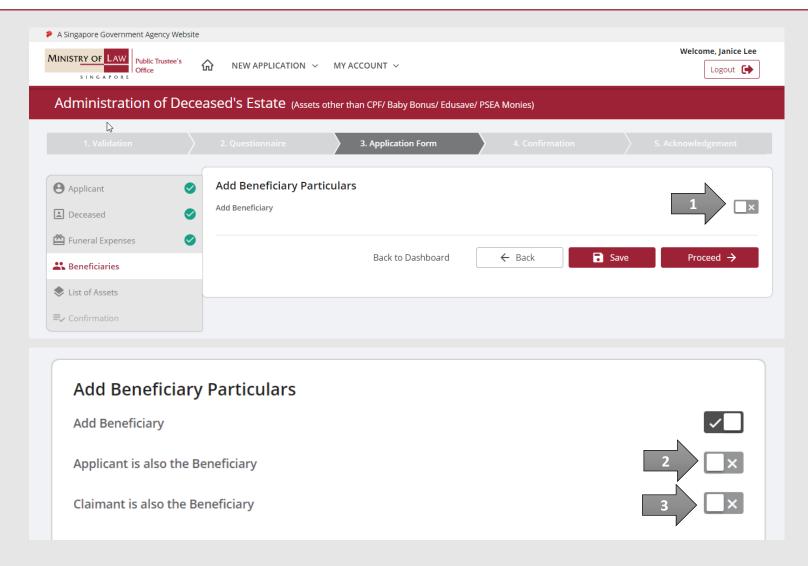


22. In the **Beneficiaries** page, turn on the option **Add Beneficiary** to enter **Beneficiary Particulars** information.

Turn on the next option if the Applicant is also the Beneficiary or Claimant is also the Beneficiary.

OR

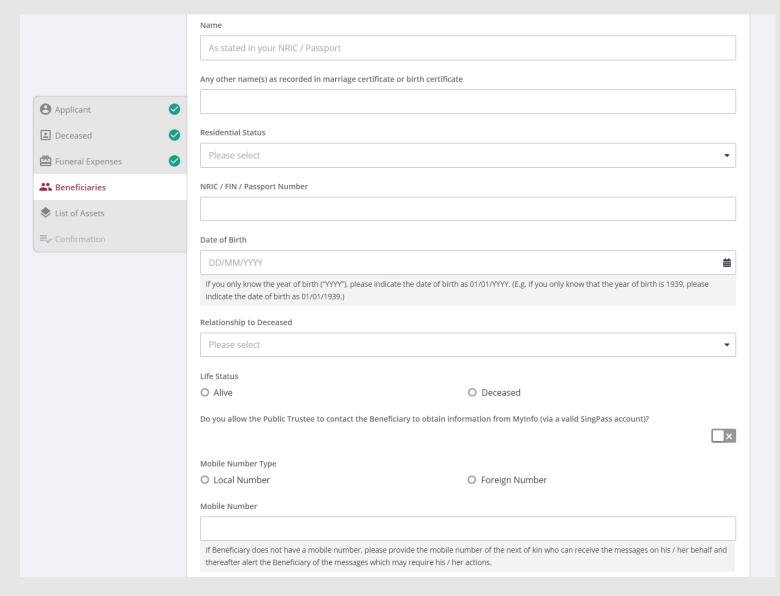
Enter **Beneficiary Particulars** information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



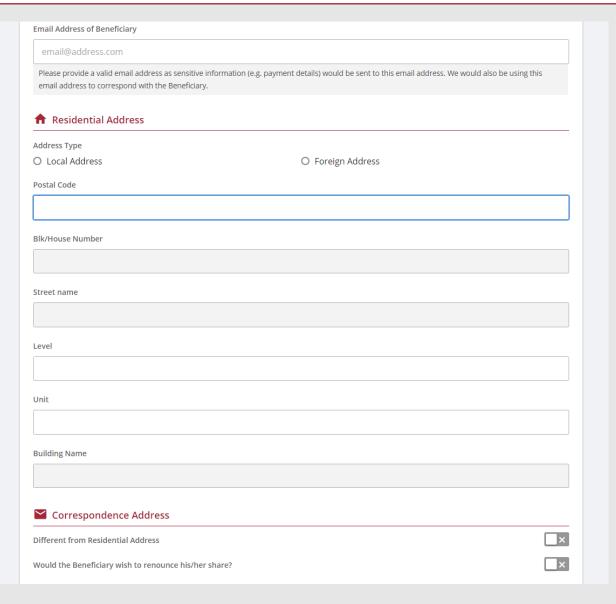
23. Continue to enter the **Beneficiary Particulars** information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



24. Continue to enter the **Beneficiary Particulars** information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



25. Select the **Mode of Receiving**Payment.

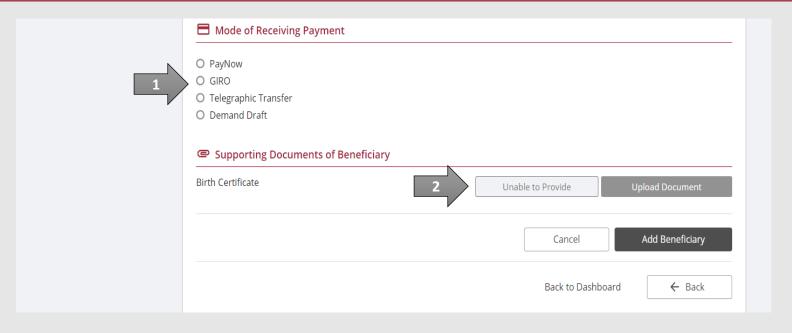
Please refer to Steps 17 - 20 (page 22 – 25) regarding the various payment mode.

Upload the required **Supporting Documents of Beneficiary**.

Please refer to Steps 9 – 10 (page 14 – 15) if you are not sure how to upload a document.

OR

Click on the **Unable to Provide** button if you are not able to submit the required document, with reason and next course of action required.



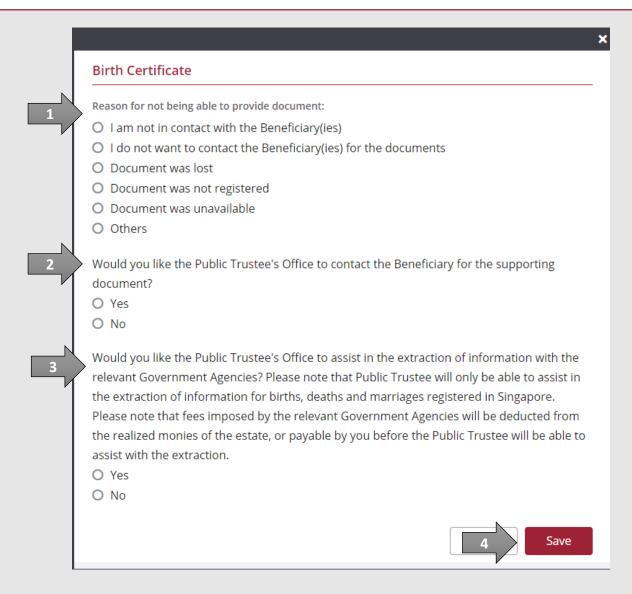
(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



26. If you are unable to provide the document, answer the stated questions.

AND

Click on the **Save** button.



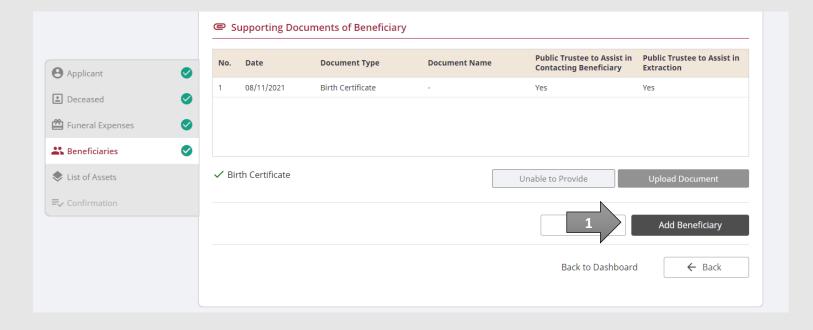
(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



27. Verify the Supporting Documents.

AND

Click on the **Add Beneficiary** button to add the Beneficiary to the list.



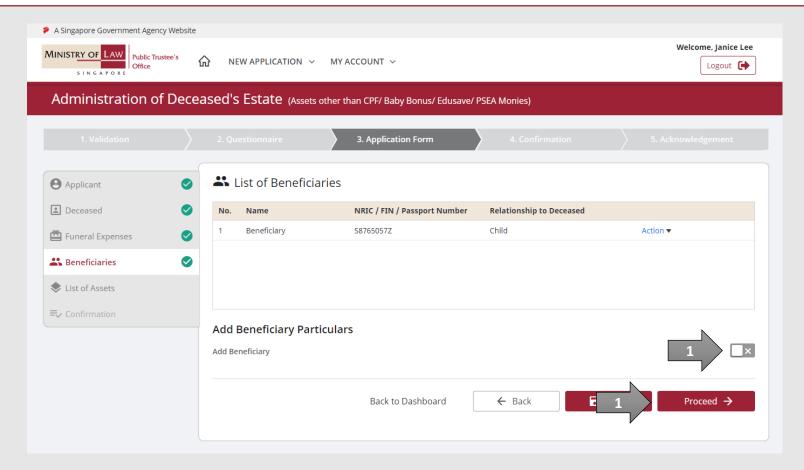
(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



28. Turn on the option **Add Beneficiary** to add more
Beneficiary.

OR

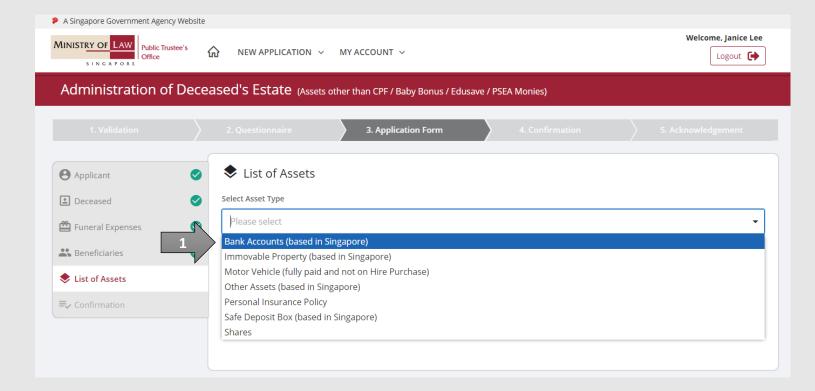
Click on the **Proceed** button to continue.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



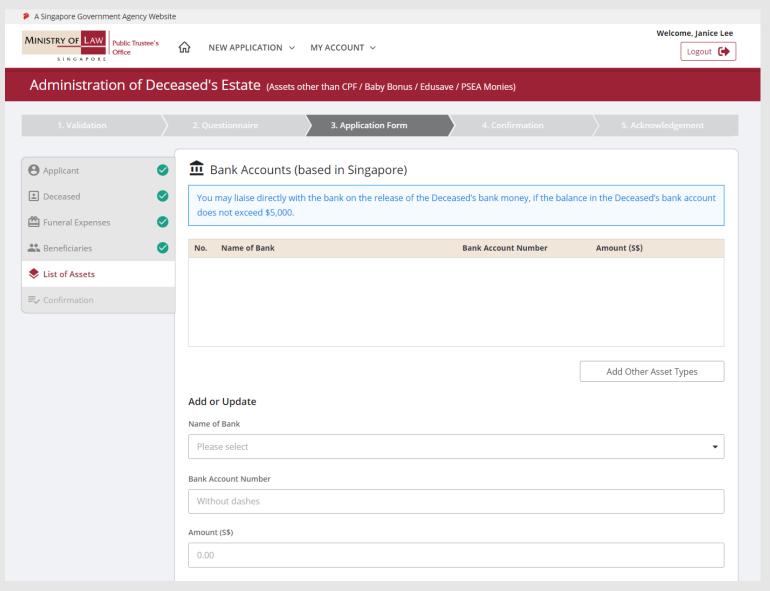
29. In the **List of Assets** page, select the **Asset Type** to add the list of Assets.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



30. For Bank Accounts (based in Singapore), enter the bank accounts information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



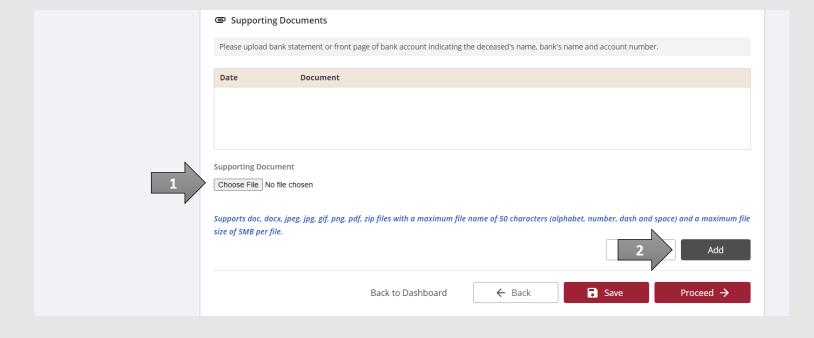
31. Upload the **Supporting Documents** of bank accounts (based in Singapore).

Please refer to Steps 9 – 10 (page 14 – 15) if you are not sure how to upload a document.

Verify the Supporting Documents.

AND

Click on the Add button.

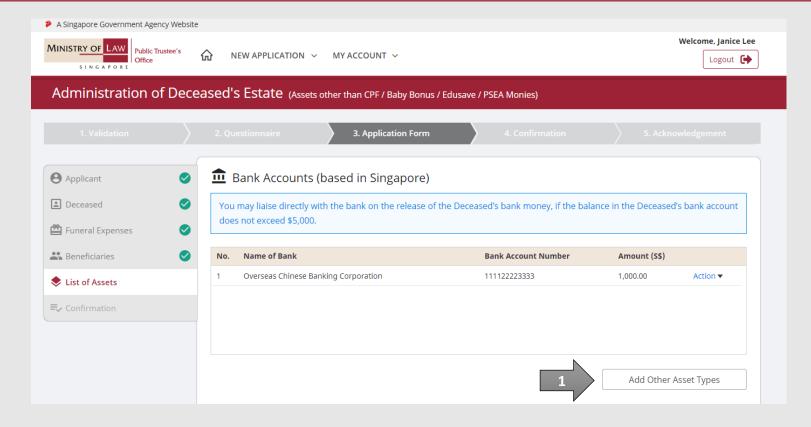


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



32. Verify the added Bank
Accounts (based in Singapore)
record.

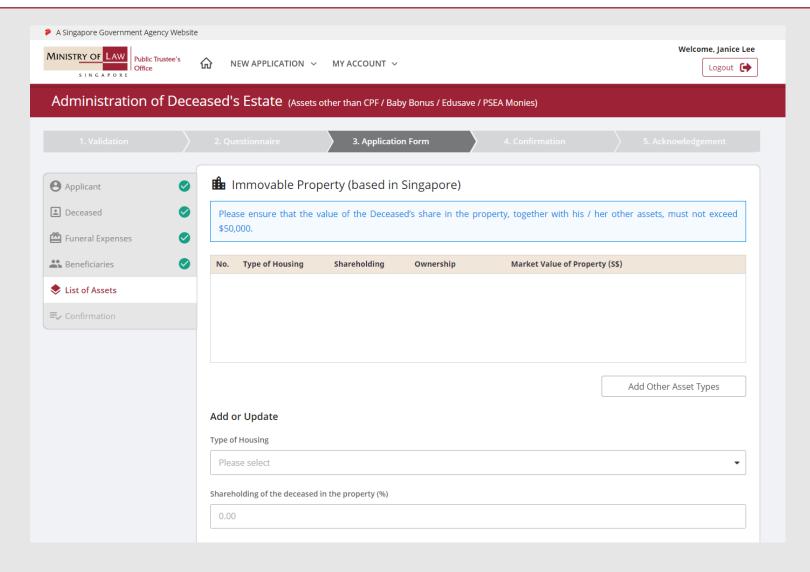
AND



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



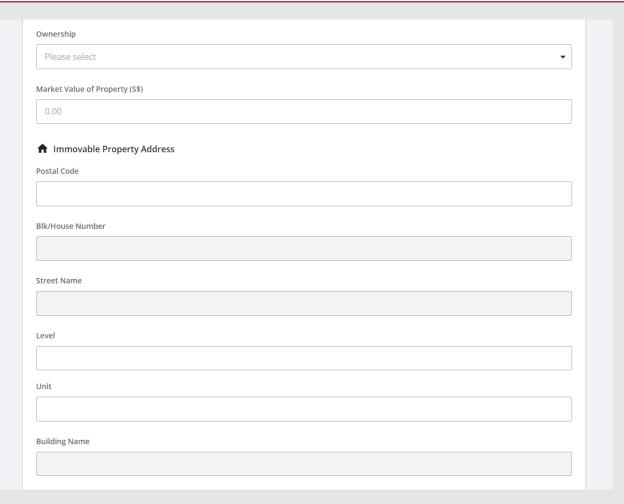
33. For **Immovable Property** (based in Singapore), enter the property information.







34. Continue to enter the Immovable Property (based in Singapore) information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



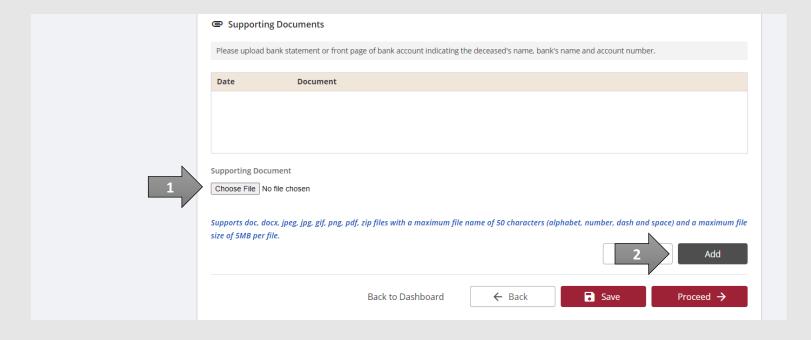
35. Upload the **Supporting Documents** of Immovable
Property (based in Singapore).

Please refer to Steps 9 – 10 (page 14 – 15) if you are not sure how to upload a document.

Verify the Supporting Documents.

AND

Click on the Add button.

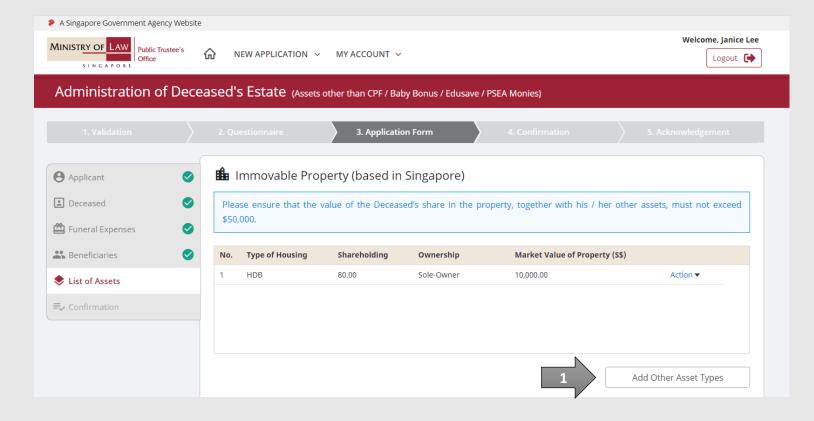


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



36. Verify the added **Immovable Property** (based in Singapore) record.

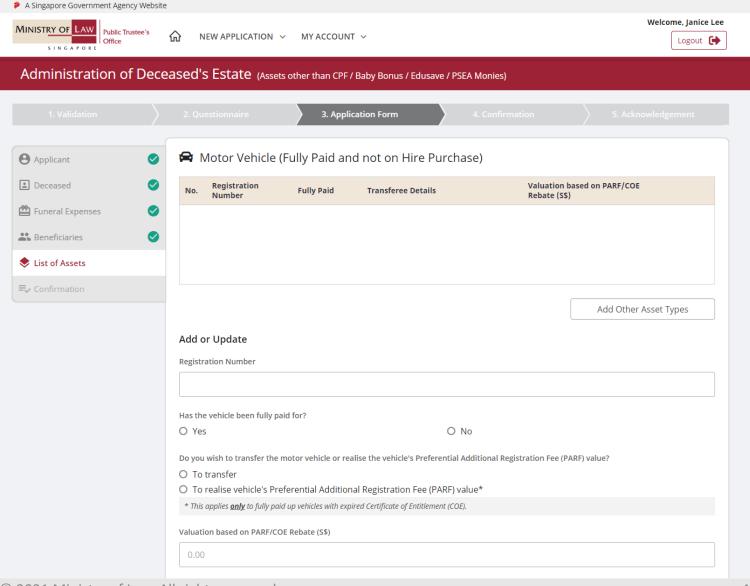
AND



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



37. For Motor Vehicle (Fully Paid and not on Hire Purchase), enter the motor vehicle information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



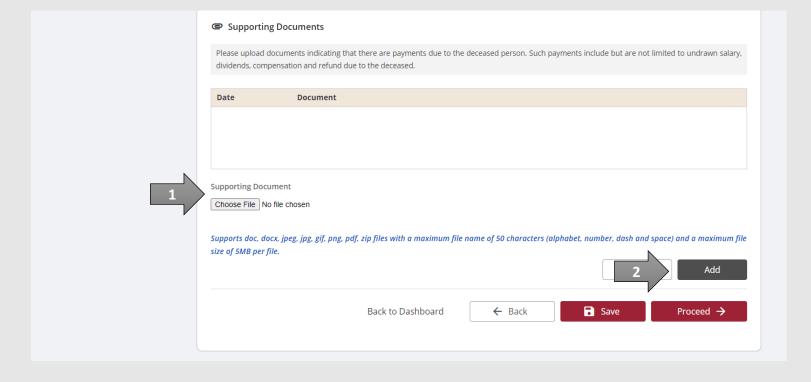
38. Upload the **Supporting Documents** of Motor Vehicle
(Fully Paid and not on Hire
Purchase).

Please refer to Steps 9 – 10 (page 14 – 15) if you are not sure how to upload a document.

Verify the Supporting Documents.

AND

Click on the Add button.

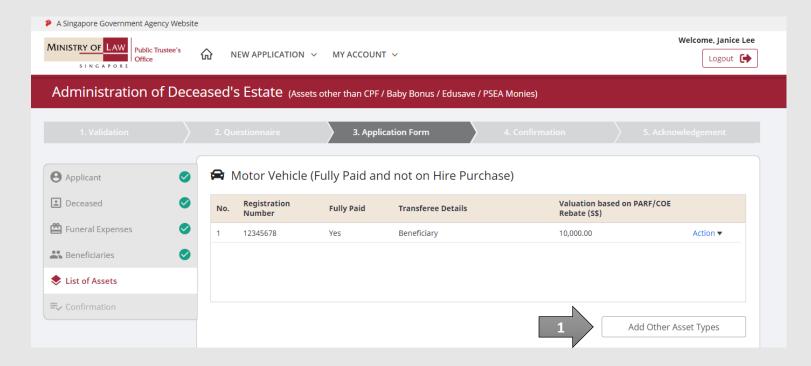


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



39. Verify the added **Motor**Vehicle (Fully Paid and not on Hire Purchase) record.

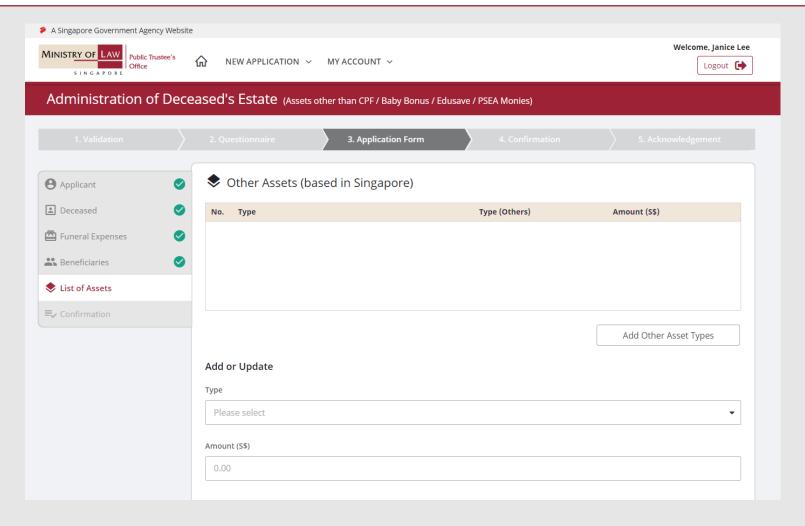
AND



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



40. For Other Assets (based in Singapore), enter the asset information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



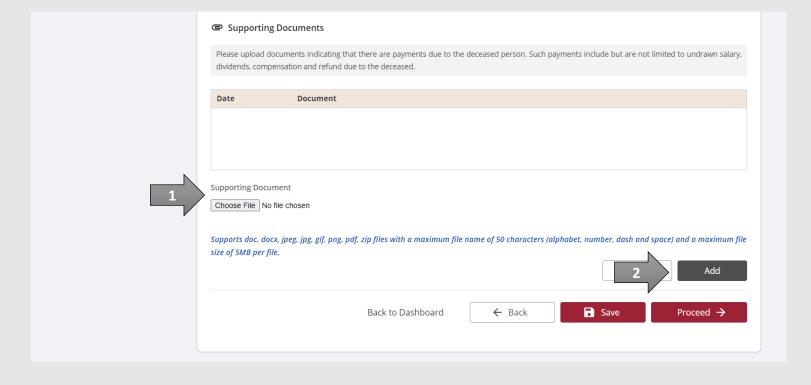
41. Upload the **Supporting Documents** of Other Assets (based in Singapore).

Please refer to Steps 9 – 10 (page 14 – 15) if you are not sure how to upload a document.

Verify the Supporting Documents.

AND

Click on the Add button.

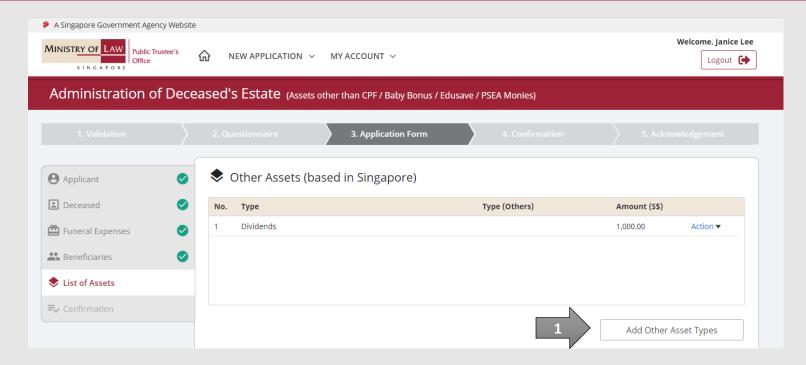


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



42. Verify the added **Other Assets** (based in Singapore) record.

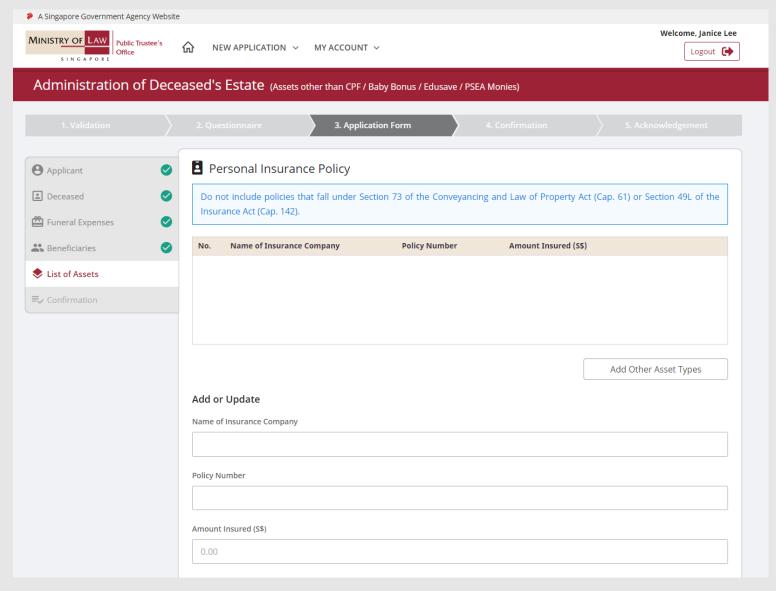
AND



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



43. For **Personal Insurance Policy**, enter the insurance policy information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



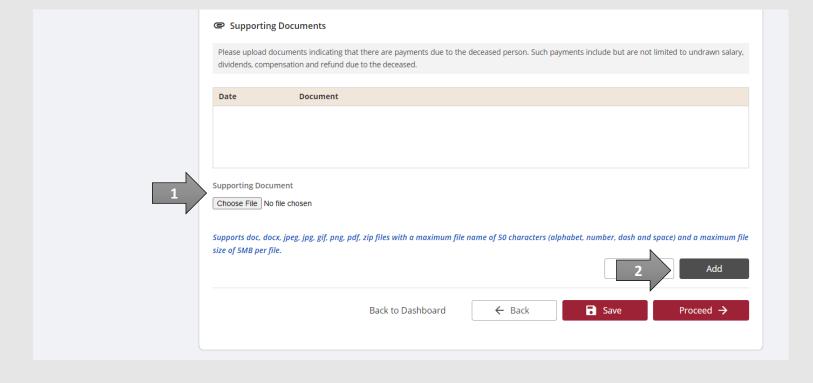
44. Upload the **Supporting Documents** of Personal Insurance Policy.

Please refer to Steps 9 – 10 (page 14 – 15) if you are not sure how to upload a document.

Verify the Supporting Documents.

AND

Click on the Add button.

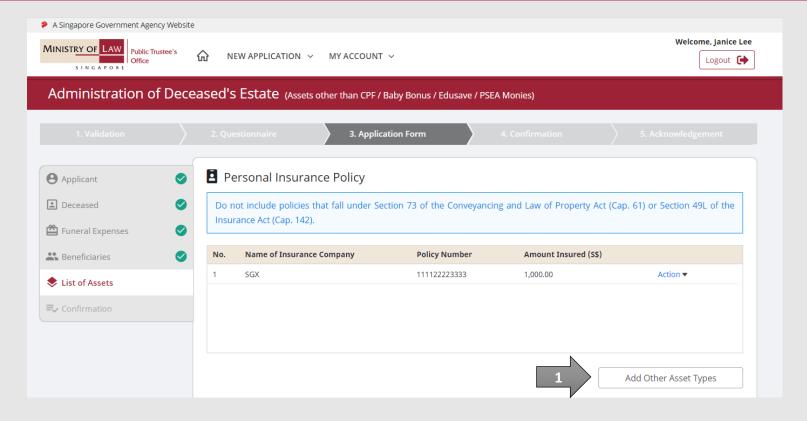


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



45. Verify the added **Personal Insurance Policy** record.

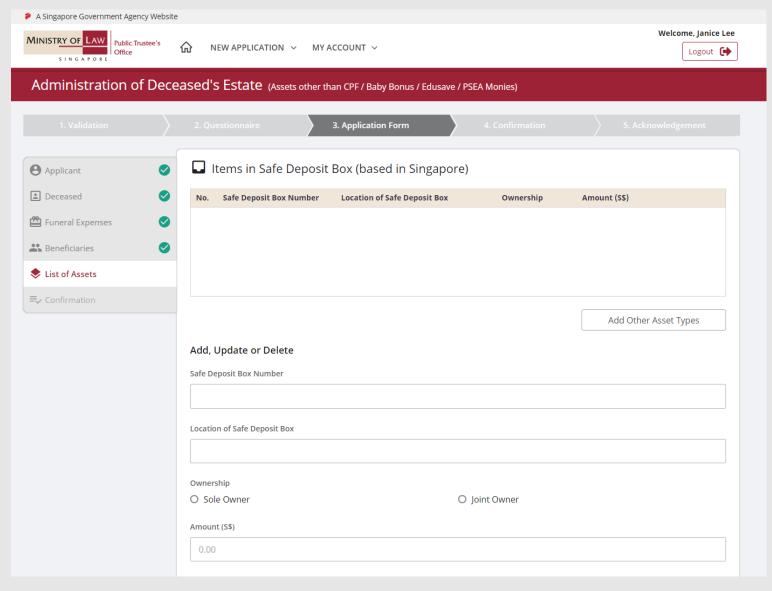
AND



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



46. For Items in Safe Deposit Box (based in Singapore), enter the safe deposit box information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



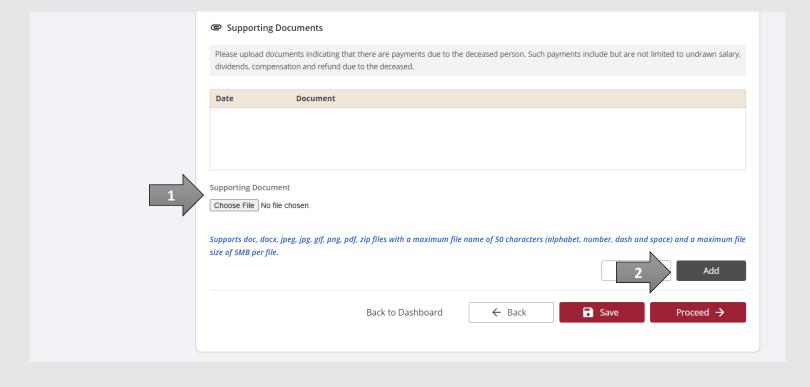
47. Upload the **Supporting Documents** of Safe Deposit
Box (based in Singapore).

Please refer to Steps 9 – 10 (page 14 – 15) if you are not sure how to upload a document.

Verify the Supporting Documents.

AND

Click on the Add button.

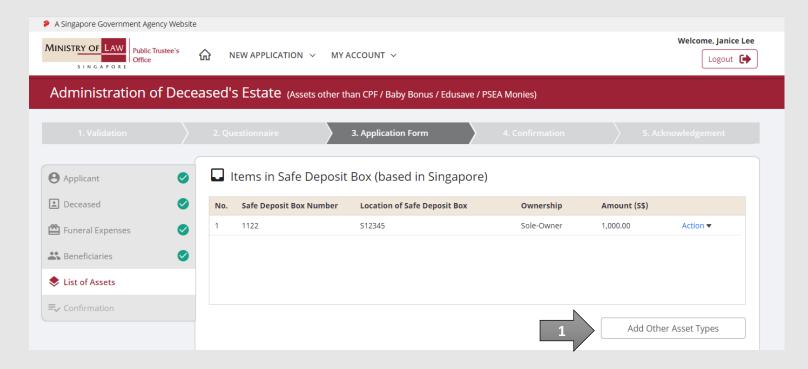


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



48. Verify the added **Safe Deposit Box (based in Singapore)**record.

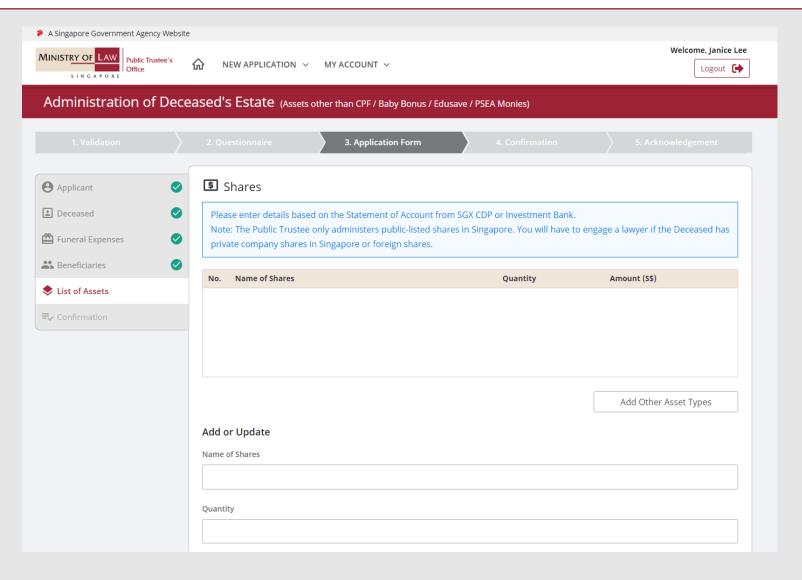
AND



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



49. For **Shares**, enter the shares information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



50. Continue to enter the shares information.

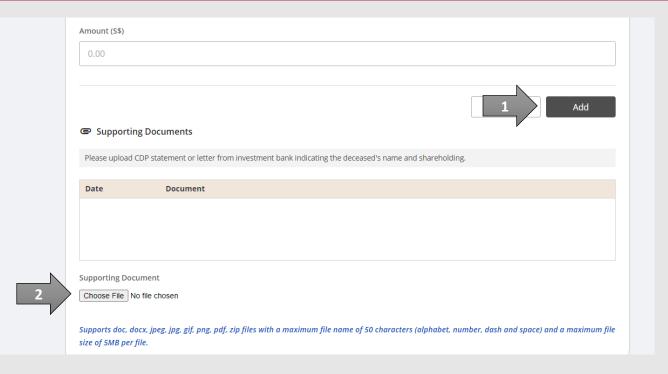
Click on the **Add** button.

AND

Upload the **Supporting Document**s of Shares.

Please refer to Steps 9 – 10 (page 14 – 15) if you are not sure how to upload a document.

Verify the Supporting Documents.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)

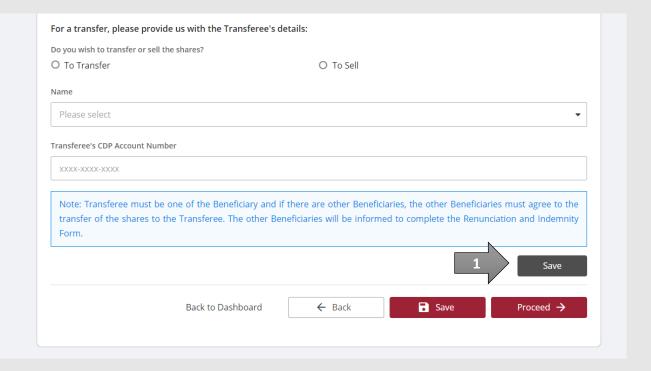


51. Continue to enter the shares information.

If 'To Transfer' is selected, please enter the Transferee's Name and CDP account Number.

AND

Click on the Save button.

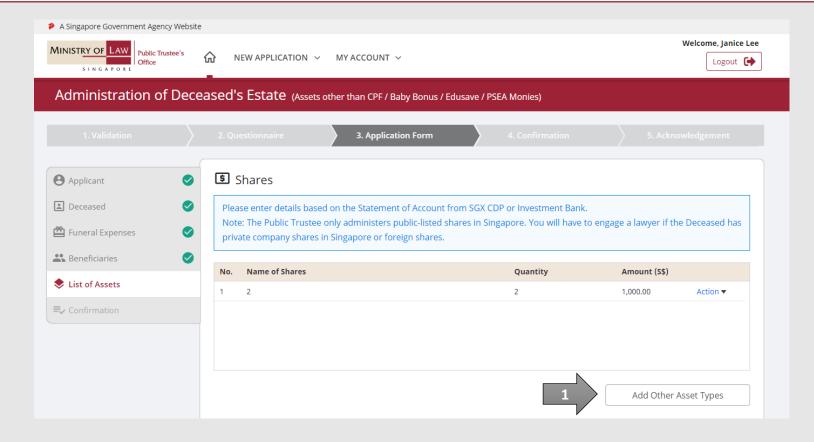


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



52. Verify the added **Shares** record.

AND



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)

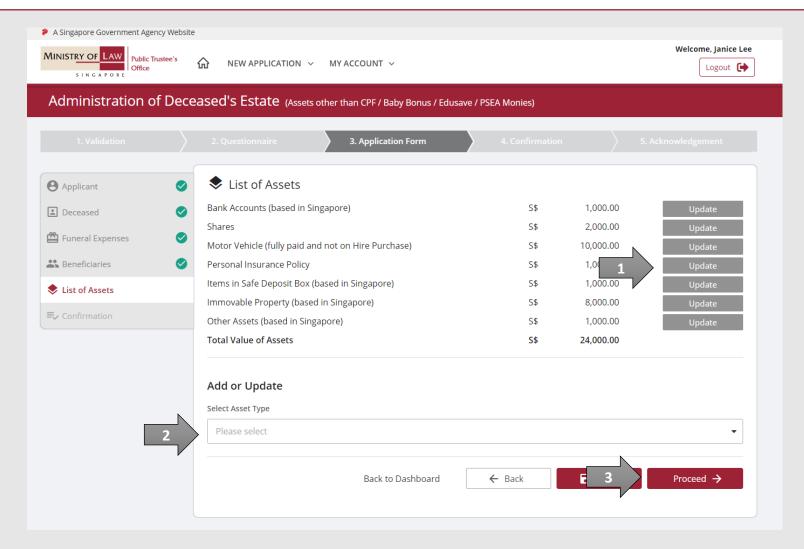


53. To edit an asset record, select the asset and click the **Update** button of the asset type.

To add new asset record, select from the dropdown at Select Asset Type.

OR

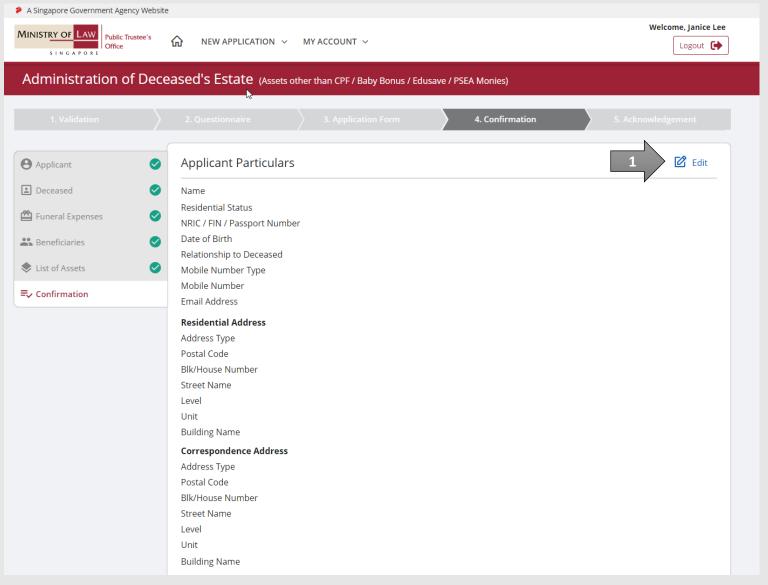
Click on the **Proceed** button.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



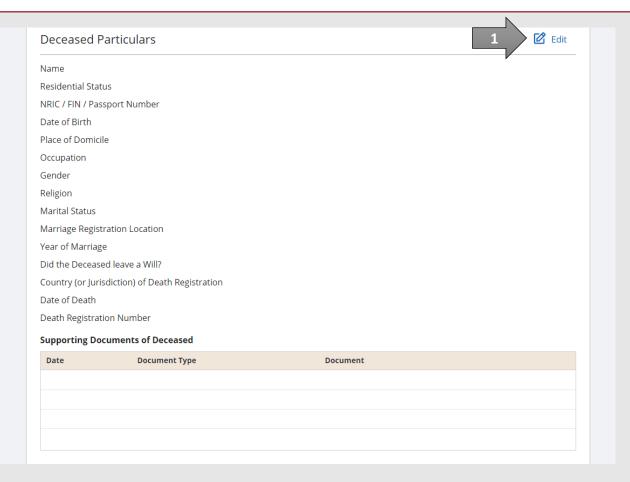
54. In the **Confirmation** page, review the information entered and click on the **Edit** link if the record needs to be updated.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



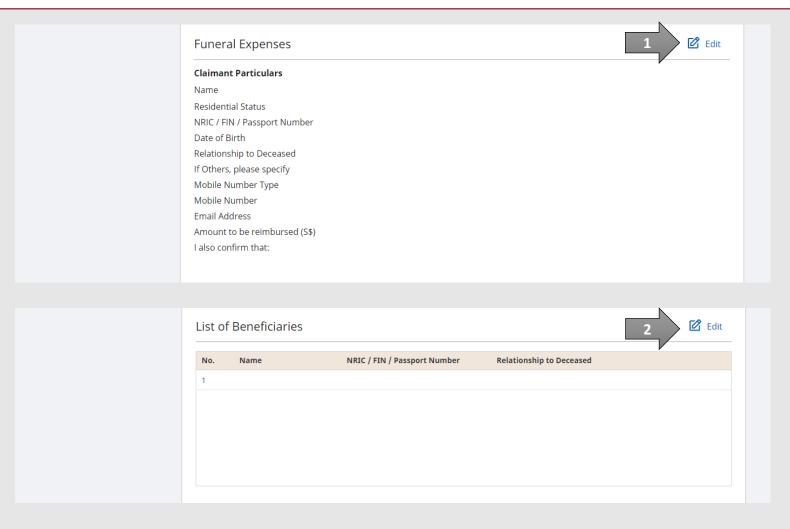
55. Continue to review the application information.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



56. Continue to review the application information.



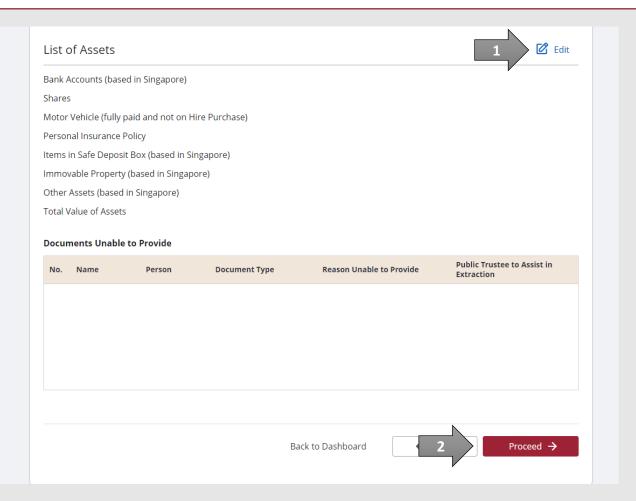
(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



57. Continue to review the application information.

AND

Click on the **Proceed** button if the application is ready to be submitted.

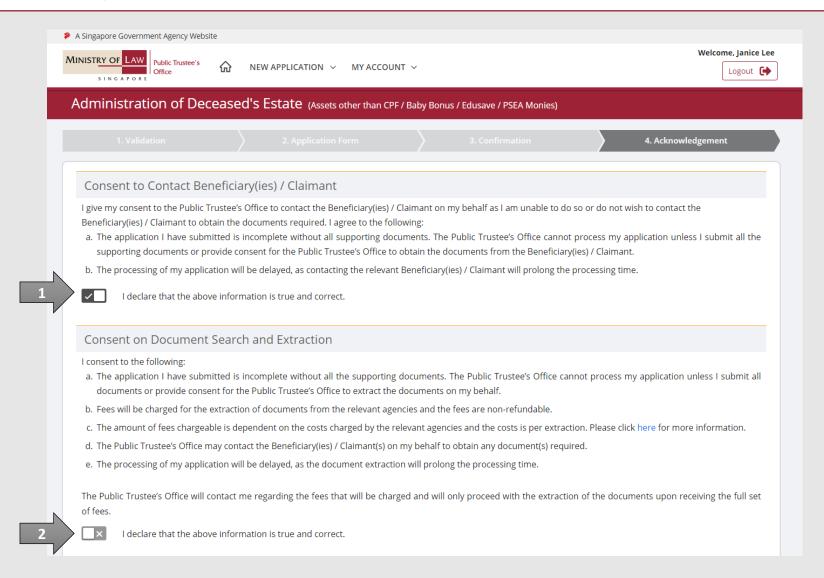


(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



58. After reading the information, turn on the option(s) to make the declaration.

There are 3 sets of declarations to be made.



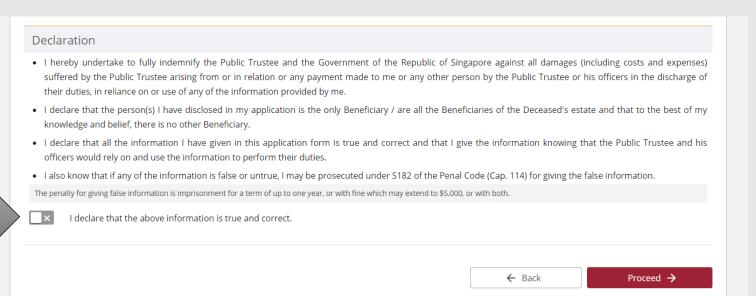
(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



59. Turn on the option to make the declaration.

AND

Click on the **Proceed** button to continue.



(Assets other than CPF / Baby Bonus / Edusave / PSEA Monies)



33. Click on the **Print** button to view the PDF document of the submitted application. Please save/print a copy of the submitted application as it will not be retrievable.

You may also click on the **Back to Dashboard** button for the other E-services.

If you would like to submit an application for the deceased's un-nominated CPF monies, click on the **Yes, Proceed** button. This option will be available if no application has been submitted previously.

