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Notification by mail of a deceased person

Use this form to officially notify us by mail of a person's death and of who will be managing the estate.

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Better ways to do this

You can **complete an online form** and present your supporting documents at an Australia Post outlet.

This way you can keep your supporting documents. You do not need to send us certified copies, which will not be returned to you.

Get the form

Download <u>Notification of a deceased person (NAT 74279, PDF 241KB)</u> 한

What you can do with this form

You can:

- download and complete the form
- mail the completed form and certified copies of your <u>supporting</u> <u>documents</u> to the address on the form.

It takes up to 28 days to update the deceased person's records after we receive your form.

If your form is incomplete, or the supporting documents are not certified correctly, the process may be delayed. You may need to send another notification.

If you are the legal personal representative (LPR), you can use this form to request a data package of the deceased person's tax and super information.

What you will need

Include your supporting documents when you mail the form.

We can only accept **certified copies of your original documents**. We can't accept documents that have been amended or altered in any way.

We will not return documents that you mail to us.

In some states, grant of probate and letters of administration can be applied for online and a paper version is not issued. These are stored electronically and can be accessed through the relevant supreme court website. You will need to print the document and have the paper version certified.

Death certificate

You need to present us with the death certificate to officially notify us of a person's death if you haven't obtained a grant of probate or letters of administration.

If you don't have a death certificate, contact the births, deaths and marriages registry in your state or territory to get one. If the person died overseas, obtain a death certificate from the appropriate overseas authority.

Grant of probate or letters of administration

The LPR has full authority to manage the deceased's tax affairs.

To be authorised as the LPR, you need to provide:

- grant of probate (for an executor)
- letters of administration (for an administrator).

If you include a certified copy of a grant of probate or letters of administration in your notification form, you don't need to include a death certificate.

Where more than one LPR needs to be added as an authorised contact, each of you will need to complete and submit your own form.

If you submitted an official notification of death before you had the grant of probate or letters of administration, you can resubmit this form to provide these documents to us. We will then list you as the LPR in our records.

If you don't have probate or letters of administration

If you have decided not to apply for probate or letters of administration, provide the will (if there is one).

We can:

- use the will to verify your role in the estate's tax affairs
- add your name to our records, with a note that you are managing the estate's tax affairs.

However, you will not be recorded as the LPR or authorised contact on the deceased person's record. This means there are legal restrictions on the information and funds we can release to you.

Change of name

If the deceased's name is different to the name in the supporting documents, you will need to provide one of the following documents, issued by an Australian state or territory registrar of births, deaths and marriages:

- updated birth certificate (not an extract)
- change of name certificate

• marriage certificate.

We can only accept certified copies of your original documents. The certified copies will not be returned to you.

Legal practitioners and tax agents

If you are a legal practitioner or tax agent appointed by the LPR, you can officially notify us of the person's death and the identity of the LPR.

You must lodge the required documents and information by mail:

- 1. Complete the <u>Notification of a deceased person (NAT 74279,</u> <u>PDF 241KB)</u> ^I and have it signed by the LPR.
- 2. Attach
 - a. certified copies of the required supporting documentation
 - b. authorisation of your appointment to act on behalf of the LPR, on your firm's letterhead.
- 3. Mail these to

Australian Taxation Office PO Box 3006 PENRITH NSW 2750

We will then record the LPR and you as authorised contacts on the deceased person's record.

We will not return documents that you mail to us.

What else you can do

Find out more about managing a deceased estate.

QC 67531

Our commitment to you

We are committed to providing you with accurate, consistent and clear information to help you understand your rights and entitlements and meet your obligations.

If you follow our information and it turns out to be incorrect, or it is misleading and you make a mistake as a result, we will take that into account when determining what action, if any, we should take.

Some of the information on this website applies to a specific financial year. This is clearly marked. Make sure you have the information for the right year before making decisions based on that information.

If you feel that our information does not fully cover your circumstances, or you are unsure how it applies to you, contact us or seek professional advice.

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