



Tax file number – application for a deceased estate

Complete this application if you:

- are a trustee or executor
- need a tax file number (TFN) for a deceased estate.

ATO USE ONLY								
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

➤ Do not use this application if you represent a:

- trust that is not a deceased estate
- company, partnership or other organisation.

Instead, see 'Other ways you can apply'.

When completing this application:

- print clearly using a black or dark blue pen
- use BLOCK LETTERS and print one character per box
- place in applicable boxes.

After the date of death, a deceased person's estate is treated separately from the deceased person for tax purposes. We record a TFN for the estate as 'The trustee for the (deceased person's full name) estate'.

OTHER WAYS YOU CAN APPLY

You can apply for a TFN for a deceased estate (trust, company, partnership or other organisation):

- online through the Australian Business Register (ABR) at abr.gov.au
- through your registered tax agent.

➤ For more information or help completing this application:

- phone us on **13 28 66** between 8.00am and 6.00pm, Monday to Friday
- visit our website at ato.gov.au and refer to *Managing the tax affairs of someone who has died*.

Section A: Deceased person's details

1 What is the full name of the deceased person?

Title: Mr Mrs Miss Ms Other

Family name

First given name Other given names

2 What was the deceased person's date of death? / /

3 Was the deceased person an Australian resident for tax purposes? No Yes

4 Did the deceased person have a tax file number? No (or not sure) Go to question 5

Yes Please provide the deceased person's tax file number (see the Privacy note in the declaration on page 5)

5 What was the deceased person's date of birth? / /

6 What was the deceased person's sex? Male Female

Section E: Supporting documents

To process this application we may need documents to prove your identity if you are an:

- individual and you did not provide a TFN at section B
- organisation and you did not provide a TFN or an ABN/ACN/ARBN at section B.

FOR INDIVIDUALS

If you did not provide the trustee's or executor's TFN at question 8 you must attach one of the acceptable proof of identity documents listed below.


FOR ORGANISATIONS

If you have not provided the trustee's or executor's TFN or ABN/ACN/ARBN at question 10, you must attach one of the acceptable proof of identity documents listed below.

Acceptable proof of identity documents

Document description

- The deceased person's last will and testament stating you are the trustee or executor.
- A notice of appointment of trustee (including probate or letters of administration).
- A death certificate with a letter stating you are the trustee or executor.

 We prefer certified copies of original documents but we will also accept unaltered original documents. We will return original documents to you by registered mail.

Documents that have been corrected or changed and initialled are not acceptable.


The name on any documents you provide must match the deceased person's name as provided on this application.

We may check the proof of identity information you supply with the agencies that issued them.

Certified copies of documents

If you do not want to mail important documents you can have them photocopied and certified as true and correct by a:

- barrister
- Commissioner for declarations (Queensland only)
- doctor
- judge
- Justice of the Peace
- minister of religion (who is authorised to celebrate marriages)
- police officer
- bank, building society or credit union officer of at least five years service
- sheriff's officer
- solicitor.

 We cannot accept copies certified by a registered tax agent, friend or family member.

A certified copy must be:

- unaltered
- stamped and signed by the certifier – the stamp must show the certifier's contact details, including telephone number and reference number (as applicable). If the certifier's signature is not legible, they must print their name.

Documents in languages other than English

If your original document is not written in English, you must provide a written translation that an authorised translation service has certified as a true and correct copy. Authorised translation services include:

- an appropriate embassy
- a professional translation service accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI).

You must show the staff original documents, not photocopies. The documents must not be altered in any way.

