



Notification of a deceased person

Use this form to officially notify us of a person's death. If you are the executor or administrator, you can also use this form to add new contact details on the deceased person's record.

WHEN COMPLETING THIS FORM

This form can be completed on screen. When complete, print, sign and date the declaration at the end of the form.

Make sure you provide acceptable supporting documents (see question 9).

If completing this form by hand:

- print clearly in BLOCK LETTERS using a black or dark blue pen only
- place in ALL applicable boxes
- do not use correction fluid or covering stickers
- sign next to any corrections with your full signature (not initials).

➤ MORE INFORMATION

For more information on managing the tax affairs of someone who has died, you can:

- phone us on **13 28 61** between 8.00am and 6.00pm, Monday to Friday
- visit our website at ato.gov.au

If you do not have the death certificate phone us on **13 28 61** – we may still be able to add some information about the person's death to our records.

If you phone, we need to know we are talking to the right person before we can discuss the tax affairs of someone who has died. You will need to provide information about yourself and the person who has died. If you can, have your tax file number (TFN) and information about the deceased person with you (see the privacy note in the declaration on page 4).

Section A: Deceased person's details

1 Do you have the death certificate for the deceased person?

No You cannot use this form. See 'More information' above.

Yes You need to provide the death certificate with this form. It needs to be an original or a certified copy. See page 5 for more information about supporting documentation requirements.

2 What is the full name of the deceased person?

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

3 What is the deceased person's TFN? (See the privacy note in the declaration on page 4.)

If you do not know their TFN, leave this blank.

4 What was the deceased person's date of birth?

Day Month Year
 / /

5 What was the deceased person's date of death?

Day Month Year
 / /

6 What was the postal address of the deceased person?

Provide the postal address as it was when the person last dealt with the ATO – for example, on the last notice of assessment.

[Empty address line 1]
[Empty address line 2]

Suburb/town/locality

[Empty suburb/town/locality field]

State/territory

[] [] []
(Australia only)

Postcode

[] [] [] [] [] []
(Australia only)

Country if other than Australia

[Empty country field]

7 Was the deceased person's home address different from their postal address?

Provide the home address as it was when the person last dealt with the ATO – for example, on the last notice of assessment. This needs to be a street address, for example, 123 Smith St. This cannot be a post office box number, roadside mail bag, roadside delivery or other delivery point address.

No Yes Provide details below

[Empty home address line 1]
[Empty home address line 2]

Suburb/town/locality

[Empty suburb/town/locality field]

State/territory

[] [] []
(Australia only)

Postcode

[] [] [] [] [] []
(Australia only)

Country if other than Australia

[Empty country field]

! If you are not providing executor and administrator details, go to section C.

Section B: Executor or administrator details

We need these details to ensure you are authorised to act on behalf of the deceased person.

8 Are you an executor or administrator?

No Go to section C.

Yes

9 What supporting document will you provide?

You need to provide one of the following current supporting documents in addition to the death certificate, stating you are the executor or administrator of the deceased estate. It needs to be an original or a certified copy.

See page 5 for more information on the requirements your documents need to meet, including certifying photocopies of original documents. We may check the supporting documents you supply with the agencies that issued them.

Place **X** in the applicable box.

The deceased person's last will and testament

A letter of administration

Evidence of grant of probate

10 What is your TFN? (See the privacy note in the declaration on page 4.)

[] [] [] [] [] [] [] [] [] [] [] []

11 What is your full name and contact details?

You will be added as an authorised contact on the deceased person's record and will be the nominated representative to whom we may disclose information.

Full name

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

! A contact number must be provided.

Business hours phone number

Mobile phone number

Email address (use BLOCK LETTERS)

! If you want to nominate other contacts, provide their details on a separate sheet of paper including their full name and all of the details listed above. You will also need to specify which matters you nominate them to deal with (for example, all taxation affairs or specific matters such as income tax, ABN, superannuation or GST).

If an additional contact person is a registered tax agent, also provide their tax agent registration number.

12 What is your date of birth?

Day / Month / Year

13 What is your postal address?

Suburb/town/locality

State/territory

(Australia only)

Postcode

(Australia only)

Country if other than Australia

14 Is your home address different from your postal address?

This needs to be a street address, for example, 123 Smith St. This cannot be a post office box number, roadside mail bag, roadside delivery or other delivery point address.

No Yes Provide details below

Suburb/town/locality

State/territory

(Australia only)

Postcode

(Australia only)

Country if other than Australia

15 Do you want to change the postal address on the deceased person's record for service of notices and correspondence?

No Yes Provide details below

Suburb/town/locality

State/territory

(Australia only)

Postcode

(Australia only)

Country if other than Australia

Section C: Declaration – this section is compulsory

16 Who is the person signing this declaration?

(Complete all of the fields below)

Full name of signatory

Business hours phone number

Mobile phone number

Email address (use BLOCK LETTERS)

Before you sign this form

Make sure you have answered all the relevant questions correctly and read the privacy statement below before you sign and date this page. An incomplete form may delay processing and we may ask you to complete a new form.

 Penalties may be imposed for giving false or misleading information.

Privacy

The ATO is authorised by the *Taxation Administration Act 1953* to request tax file numbers (TFNs). We will use the TFN to identify the deceased person and the executor or administrator in our records. It is not an offence not to provide TFNs. However, if you do not provide a TFN, there may be a delay in processing this form.

Taxation law authorises the ATO to collect information and to disclose it to other government agencies. For information about your privacy go to ato.gov.au/privacy

We may check the supporting documents you supply with the agencies that issued them.

I declare that the information given on this form is true and correct.

Signature

You MUST SIGN here

Date


Day		/	Month		/	Year			
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Lodging this form

You can lodge your completed application with current original or certified supporting documents to us by:

- visiting your nearest ATO shopfront – phone **13 28 61** between 8.00am and 6.00pm, Monday to Friday, to make an appointment
- mailing it to

Australian Taxation Office
PO Box 9942
MOONEE PONDS VIC 3039

 **Make a copy of your application for your own records before you lodge it.**

We will aim to process this form within 28 days of receiving all the necessary information. If your form is incomplete, incorrect or needs checking, it may take longer. Do not lodge another form during this time.

Supporting document requirements

 Do not send this page to the ATO.

We will only accept current and unaltered original documents, or copies certified as outlined below. If it has been corrected or changed and initialled, we will not be able to accept it.

If you send us original documents they will be returned to you as soon as possible.

DOCUMENTS IN YOUR PREVIOUS NAME

If your documents are in a previous name, you need to provide a document that shows how your name was changed (for example, registered marriage certificate, deed poll or change of name certificate).

DOCUMENTS NEED TO BE IN ENGLISH

If your document is not in English it will need to be translated into English and certified as a true and correct copy. Details of accredited translators and interpreters can be found at naati.com.au

IF YOU ARE OUTSIDE AUSTRALIA

If you are outside Australia, you can take the original documents to an Australian Embassy, High Commission or Consulate, visit dfat.gov.au for a listing of offices. The staff can certify copies of these documents and can also give you names of authorised translation services. If you are unable to reach one of these locations or for more information on how to certify copies of documents, you can:

- phone us on **+61 2 6216 1111** between 8.00am and 5.00pm, Monday to Friday (AEST) and ask to be transferred to Personal tax enquiries
- visit our website at ato.gov.au

CERTIFYING PHOTOCOPIES OF YOUR ORIGINAL DOCUMENTS

When supplying certified documents, you need to photocopy all pages of your original document, ensuring any text and photograph are clear and identifiable. Take that copy with your original document to one of the certifiers listed below.

They must sight the original document and the copy, and certify that each page is a true copy by writing or stamping 'CERTIFIED TRUE COPY', followed by:

- their signature. If the certifier does not use a stamp, or the stamp does not include their name, they need to print their name underneath their signature
- their qualification (for example, Justice of the Peace), contact details including telephone number, and reference number (if applicable)
- the date.

ATO APPROVED CERTIFIERS

These people can certify copies of your documents as true and correct for the ATO:

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