

Section B: Trustee or executor's details

- 6 Is the trustee or executor an individual?** No Go to question 9
Yes

7 What are your details?

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given name

TFN (see the Privacy note in the Declaration on page 5)

! If you do not provide the trustee's or executor's TFN, read section E to see if you need to provide further information to prove your identity for registration purposes.

Date of birth / /

8 Will you also be a contact person for the deceased estate?

No Go to section C

Yes Provide your contact details

Preferred name

Business hours phone number (you must provide a contact number - include area code)

Mobile phone number

After hours phone number (include area code)

Fax number (include area code)

Email address (use BLOCK LETTERS) - such as EXAMPLE@PROVIDER.COM.AU

Preferred language, if other than English. We may not be able to speak to you in your preferred language.

9 Is an organisation acting as trustee or executor?

No Go to section C

Yes Provide the details

Full name

TFN (see the Privacy note in the Declaration on page 5)

Australian business number (ABN)

OR

Australian Company Number (ACN)/

Australian Registered Body Number (ARBN)

Section C: Address details

10 What is the trustee or executor's address? (This must be a street address, for example, 123 Smith St.)

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Suburb/town/locality	State/territory	Postcode
[]	[] [] []	[] [] [] []


11 What is the trustee's or executor's postal address for service of notices and correspondence?

This is the address where government departments and agencies may send notices and correspondence.

As above Cross this box if the postal address is the same as question 10.

[]		
[]		
Suburb/town/locality	State/territory	Postcode
[]	[] [] []	[] [] [] []

Section D: Contact details

-  Go to section E if:
- the trustee/executor is an individual
 - you have given your contact details at question 8, and
 - you do not want to list any additional contact people.

12 Who is the authorised contact person for the deceased estate?

Provide details of a person we may contact for more information. They must be authorised to make changes or update information on behalf of the deceased estate, for example, the trustee, executor or a registered tax agent. For more information about what an authorised contact can do, visit ato.gov.au/primarycontact

Title: Mr Mrs Miss Ms Other

Family name

Preferred name

Business hours phone number (you must provide a contact number - include area code)


Mobile phone number

After hours phone number (include area code)

Fax number (include area code)

Email address (use BLOCK LETTERS) - such as EXAMPLE@PROVIDER.COM.AU

Preferred language, if other than English. We may not be able to speak to you in your preferred language.

-  If you want to list more than one contact person, provide details of the additional contact people on a separate sheet of paper. If an additional contact person is a registered tax agent, also provide their tax agent registration number.

13 Is the authorised contact person at question 12 a registered tax agent?

No Go to section E

Yes Provide their tax agent registration number

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 7, 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 9, 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 accept certified copies of original documents. Do not send us original documents. We may not return certified copies of documents that you mail to us.

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 supporting documents you supply with the agencies that issued them.

Certified copies of documents

You can have copies of your documents certified by an authorised certifier, including a:

- barrister
- Commissioner for declarations (Queensland only)
- 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
- solicitor.

 Refer to our website for a full list of certifiers, at ato.gov.au/certifydocs_Australia

 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 qualification, 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 any of your supporting documents are not 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.

Section F: Declaration

14 Who is the trustee or executor, or if the trustee or executor is an organisation, who is the authorised person signing this declaration?

Full name of signatory

 Read the privacy statement below before you sign and date this page. Penalties may be imposed for giving false or misleading information.

I declare that:

- I am authorised by the deceased estate to complete this application on its behalf
- the deceased estate is entitled to a tax file number
- the information given on this application is true and correct.

Signature

You MUST SIGN here

Date

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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 trustee or executor 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 including personal information about the person authorised to sign the declaration. 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.


How to lodge the application

Check you have:

- completed the application
- read the supporting document requirements at section E
- included any other attachments you need to provide with your application.

Send all these documents to us at:

Australian Taxation Office
PO Box 3373
PENRITH NSW 2740

 Make a copy of the application for your own records before you mail it.

Processing time

We will aim to provide a decision on your registration within 28 days of receiving all the necessary information. If the application is incomplete, incorrect or needs checking, it may take us longer to complete the process.