

Please save a copy of this form into your preferred desktop location, fill out as required, save changes and email to estates@vincents.com.au

CONTACT DETAILS					
Title:		Last Name:			
Given Name(s):					
Law Firm:					
Postal Address:					
	Suburb:		State:		Postcode:
Phone:			Fax:		
Email:					

DOCUMENTS REQUIRED						
	Will	Attached <input type="checkbox"/> N/A – Intestate <input type="checkbox"/>	Grant	Probate attached <input type="checkbox"/> LOA attached <input type="checkbox"/>	Death Certificate	Attached <input type="checkbox"/>

DETAILS OF THE DECEASED					
Title:		Last Name:			
Given Name(s):					
Date of Birth:			Date of Death:		
Residential Address:					
	Suburb:		State		Postcode
Tax File Number:			*If the TFN of the deceased cannot be located, please complete 'Recovery of Missing TFN' form		

Please provide the following information:

	Included Yes / N/A	Comments
1. INCOME		
• Salary and wages i.e. PAYG Payment Summary and description of occupation	N/A	
• Dividends i.e. dividend statements	Yes	
• Interest income i.e. bank statements, term deposit notices	N/A	
• Managed funds i.e. annual tax and quarterly distribution statements	N/A	
• Superannuation income streams or superannuation withdrawals i.e. PAYG Payment Summary	N/A	
• Documentation for any compensation payouts	N/A	
• Income earned from overseas	N/A	
• Any other income earned	N/A	
2. DEDUCTIONS		
• Any work related expenses	N/A	
• Receipts or details of any gifts or donations made	N/A	
• Managing tax affairs i.e. tax agent fee for prior year	N/A	
• Premiums paid for income protection insurance	N/A	
• Superannuation contributions made personally	N/A	
• Any other expenses which may be tax deductible	N/A	

3. RENTAL PROPERTIES

• Details of property (address, purchase date, cost, acquisition costs, copy of contract and settlement statement, if available)	N/A	
• Was the property used for private use during the year?	N/A	
• Total rental income earned i.e. agent statements	N/A	
• Rental property expenses i.e. rates, water, insurance, repairs, travel for property inspection, body corporate, other	N/A	
• Bank statements for rental property loans	N/A	
• Documentation for any capital expenditure on the property i.e. improvements such as a new kitchen, bathroom, extension etc	N/A	
• Provide a copy of a Quantity Surveyors Report, if previously prepared	N/A	

4. PURCHASE/SALE OF ASSETS

• Total sales proceeds for any assets (properties, share investments etc) sold. Copy of the sale contract and settlement statement (if applicable)	N/A	
• Details of acquisition costs in relation to any assets sold (date of investment and amount invested)	N/A	
• Details of any transfer duty on acquisition and legal costs incurred on both the acquisition and sale of these assets	N/A	
• Provide details of foreign assets	N/A	
• Name and contact details for any broker or financial advisor who may be able to provide further information on the investments	N/A	

5. OTHER

• Copy of last income tax return lodged (if available)	N/A	
• Trust account details for any tax refunds (a/c name, BSB and a/c number)	N/A	
• Spouse name, date of birth, taxable income (if not a Vincents client)	N/A	
• Name and date of birth of all children living at home	N/A	
• If the deceased lived or worked in a remote area of Australia or served overseas in the defence force, please provide details	N/A	
• Details of out of pocket medical expenses relating to disability aids, attendant care or aged care	N/A	

ADDITIONAL INFORMATION / COMMENTS

When completed, please save changes and email this form along with supporting documents to estates@vincents.com.au

Acknowledgement of terms of engagement

On receipt of this form, Vincents will provide an engagement letter. All Legal Personal Representatives will need to sign, date and return the document to us to acknowledge the terms of engagement.