

# Deceased income tax return

CONTACT DETAILS						
Title:		Last Name:				
Given Name(s):						
Law Firm:						
Postal Address:						
	Suburb:		State:		Postcode:	
Phone:			Fax:			
Email:						
DOCUMENTS REQUIRED (certified hard copies of the original must be provided)						
	Will	Enclosed <input type="checkbox"/> or N/A – Intestate <input type="checkbox"/>	Grant	Probate enclosed <input type="checkbox"/> or LOA enclosed <input type="checkbox"/>	Death Certificate	Enclosed <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:			<i>*If the TFN of the deceased cannot be located, please complete 'Recovery of Missing TFN' form</i>			
Please provide the following information:			Included Yes / N/A	Comments		
1. INCOME						
• Salary and wages i.e. PAYG Payment Summary and description of occupation						
• Dividends i.e. dividend statements						
• Interest income i.e. bank statements, term deposit notices						
• Managed funds i.e. annual tax and quarterly distribution statements						
• Superannuation income streams or superannuation withdrawals i.e. PAYG Payment Summary						
• Documentation for any compensation payouts						

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• Income earned from overseas		
• Any other income earned		
<b>2. DEDUCTIONS</b>		
• Any work related expenses		
• Receipts or details of any gifts or donations made		
• Managing tax affairs i.e. tax agent fee for prior year		
• Premiums paid for income protection insurance		
• Superannuation contributions made personally		
• Any other expenses which may be tax deductible		
<b>3. RENTAL PROPERTIES</b>		
• Details of property (address, purchase date, cost, acquisition costs, copy of contract and settlement statement, if available)		
• Was the property used for private use during the year?		
• Total rental income earned i.e. agent statements		
• Rental property expenses i.e. rates, water, insurance, repairs, travel for property inspection, body corporate, other		
• Bank statements for rental property loans		
• Documentation for any capital expenditure on the property i.e. improvements such as a new kitchen, bathroom, extension etc		
• Provide a copy of a Quantity Surveyors Report, if previously prepared		
<b>4. PURCHASE/SALE OF ASSETS</b>		
• Total sales proceeds for any assets (properties, share investments etc) sold. Copy of the sale contract and settlement statement (if applicable)		
• Details of acquisition costs in relation to any assets sold (date of investment and amount invested)		
• Details of any transfer duty on acquisition and legal costs incurred on both the acquisition and sale of these assets		
• Provide details of foreign assets		
• Name and contact details for any broker or financial advisor who may be able to provide further information on the investments		

