

Deceased Estates

Meeting with a Tax Agent

What to bring to the meeting:

- the death certificate and will,
- probate documents or letters of administration,
- deceased's tax file number
- details of assets of deceased
- your tax file number

If you haven't already done so Notify the ATO either by paper or via Australia Post – this can only be done once you have:

- the death certificate and will,
- probate documents or letters of administration,
- deceased's tax file number

You can complete this form online and then take all the documents to Australia Post to have them checked. This is the quickest and easiest way to complete this process.

<https://www.ato.gov.au/forms-and-instructions/deceased-estates-notify-us-of-a-death-online-form>

If you are using us as your tax agents, you can add our details to the form:

Tax Agent Name: Embark Tax Services
Tax Agent No.: 24690250
Postal Address: PO Box 351, Mooroolbark VIC 3138
Phone: 03 9727 5811