

# Engagement Letter

## Deceased Estate

Name of the Deceased .....

Date of Birth ...../...../..... Date of Death ...../...../20.....

Tax File Number: ..... (only if submitting paper version, do not e-mail)

I ..... confirm that I have been appointed executor or administrator of the estate of the above taxpayer and as such I am the Legal Personal representative (LPR) of the deceased as Probate has been granted for the estate/an administrator of the estate has been appointed. A copy of the relevant document is attached.

Executor Details:

Address:.....

Contact Number: (Mobile/Home/Business).....

Email Address:.....

Tax File Number (Do not add if submitting via e-mail):.....

Date of Birth (Do not add if submitting via e-mail):.....

If this form submitted via e-mail we will call for the other required information.

### Instructions

I instruct Financial Services Tasmania (Tax Agent 25479977) to:

- 1 Add the deceased to their list of clients at the Australian Taxation Office, using Online Services for Tax Agents, and to obtain a Deceased Estate Data Package for the Deceased .
- 2 Prepare and lodge the date of death tax return for the deceased, together with any other tax returns or activity statements which may be showing as *not lodged* or *overdue*.
- 3 Obtain a Tax File Number for the trust estate.
- 4 Prepare and lodge tax returns for the estate as required.

Refunds should be sent to:

(BSB) ..... Account no .....

in the name of .....

\_\_\_\_\_

Signed by the LPR

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

Date

**Office Use**

Client Added

Estate TFN: .....