

An Executor's Essential Tax Checklist

Your guide to meeting tax responsibilities for a deceased estate without costly mistakes.

As an Executor, you have a legal responsibility to manage the deceased person's estate, including their personal and estate tax obligations. This process can be complex, time-consuming, and, if done incorrectly, costly.

Executors can even be personally liable for mistakes.

This checklist will help you understand the key steps. If at any point you feel unsure, **professional help** can save you stress, time, and money.



Our experts are here to help.

Get in touch with us at tax@statetrustees.com.au

1. Confirm your role

Make sure you have authority (either a Grant of Probate or Letters of Administration) to administer the estate.

Keep a copy of the Will and any court documents that confirm your authority.



Tip: Executors can be personally liable for errors, so know your responsibilities early.

2. Gather key information

Collect the deceased person's tax records (past tax returns, ATO notices).

Get the deceased person's tax file number.

Find details of income, assets, and liabilities.

Keep all documents in one secure place.

3. Notify the Australian Tax Office (ATO)

Inform the ATO that the person has passed away via completion of a [Notification of a Deceased Person form](#).

Provide a certified copy of the death certificate and proof of your role as Executor.



Warning: Errors here can lead to delays

4. Check for outstanding tax returns

Confirm if the deceased had any unlodged tax returns.

Complete and lodge any outstanding tax returns before finalising the estate.



Tip: Unlodged returns can create unexpected tax bills, so don't let this catch you off guard.

5. Prepare the individual final tax return

This is called the Date of Death Tax Return.

Include income earned up to the date of death.

Make sure deductions and tax offsets are applied correctly.



Note: This is where most Executors feel overwhelmed as the rules are complex and mistakes may be costly.

6. Manage estate income tax affairs

If the estate earns income after death (e.g. rent, dividends), you may need to lodge an Estate Tax Return.

Keep clear records of all transactions.



Fact: Estate tax returns are one of the most confusing parts and many Executors choose expert help here.

7. Pay any tax owed

Use estate funds to pay any tax liabilities.

Do not distribute assets until all tax obligations are settled.



Important: Distributing assets too early can make you personally liable.

8. Keep records for future reference

Store copies of all tax returns, ATO notices, and correspondence (you may need these for beneficiaries or legal purposes).

9. Seek help if needed

Tax responsibilities after someone passes away aren't just about personal tax returns, they can include property, trusts, businesses and more. These rules can be complex and mistakes can be costly.

Our team specialises in deceased estate tax and can guide you through every step, saving you time and stress.

Get in touch today and get peace of mind knowing everything is handled correctly.



[statetrustees.com.au/tax](https://www.statetrustees.com.au/tax)



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Testimonials



"Your professionalism, dedication, and personability have been the highlight in the over 2.5 years it has taken so far processing the estate." – **Lynn, Executor, Melbourne**



"Thank you so much for your work, it made my "job" so much easier!" – **John, Executor, Melbourne**

