

1 Account Summary screen

Select *Property transactions* from the *New duty transaction* drop-down menu.

Summary

- Manage users
- Manage user transactions
- Amend name
- Contact details

Summary

- New duty transaction ▾
- Property transactions
 - Trusts
 - Business transactions
 - Other transactions
 - Chapter 3 transactions

2 Dealing information screen

Select *Transfer from deceased estate* from the *Transfer type* drop-down menu.

Dealing information

Transfer type

- Property transfer
- Transfer of easement
- Transfer from deceased estate**
- Vesting of property
- Aggregated property transfer

[Documentary evidence guideline](#)
[Evidence of Value Public Ruling PUB-DT-2016-6](#)
[Interest and Penalty Tax PUB-GEN-2014-6](#)

Transaction certificate number

Populate fields

LTO dealing number

 * ?

Populate fields from TOLD

Client reference

 * ?

3 Property information screen

Complete the property information fields, and move to the next screen.

4 Transferor information screen

Transferor information

Estate/interest transferring ▾ * ?

Transferor tenancy type ▾

This is the tenancy type of the transferors in the property prior to transfer. If the transaction relates to multiple titles you should check the tenancy type is the same across the titles, if no, select 'Varied across titles'. If a transferor holds shares in the property as both a Joint tenant and Tenant in common, select Combination

Select a transferor entity type, enter their details and click 'Add another'. You will enter additional details about the entity on the next page.

Entity type Trust ▾ * ←

Always select *Trust* for a deceased estate

Trust name Estate of * ←

For Trust name, enter *Estate of (plus the full name of the deceased)*

5 Transferor information screen - Trust details

Complete the remaining Transferor information screens.

6 Transferee information screens

Complete the fields in the Transferee information screens.

7 Nominated contact screen

Complete the fields in the Nominated contact screen by using the *Populate from transferee* drop-down menu (if appropriate), or by manually entering the required information.

8 Transaction information screen

Complete the fields in this single screen.

9 Exemptions and concessions screen

If seeking an exemption or concession, follow the on-screen instruction for selecting the category and to nominate the relevant section of the Duties Act.

These can include: A Transfer by Way of Assent - s 53(j), and a Transfer from a Deceased Estate - s 47.

Exemptions and concessions

Is an exemption or concession being sought?

Yes

→ For the relevant exemption/concession category and section, use the drop-down menu, and then enter a space in the 'section' search field to make a selection.

→ Alternatively, you can simply make a selection from a list of all exemptions and concessions by entering a space in the 'section' search field.

Exemption/concession category

Select...

Exemption/concession section

Clear

10 Duty calculations screen

To complete the transaction, on the final screen, Duty calculations, use the *Submit - Self endorse* button or the *Submit for SRO approval* button, whichever is relevant to the type of transfer.