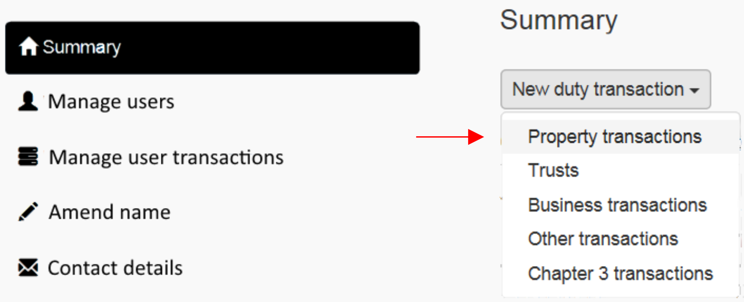
Transfers from Deceased Estates

TRO Users
Fact Sheet series No. 2

March 2018

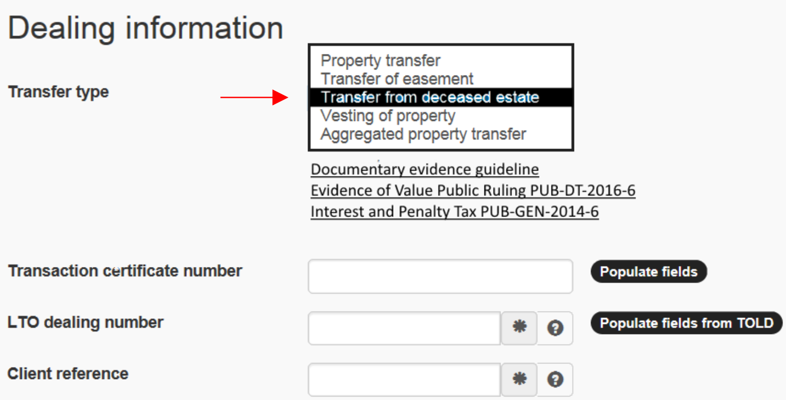
1 Account Summary screen

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



2 Dealing information screen

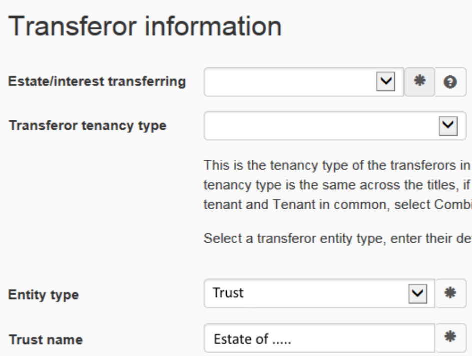
Select *Transfer from deceased estate* from the *Transfer type* drop-down menu.



3 Property information screen

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

4 Transferor information screen



← Always select *Trust* for a deceased estate

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

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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

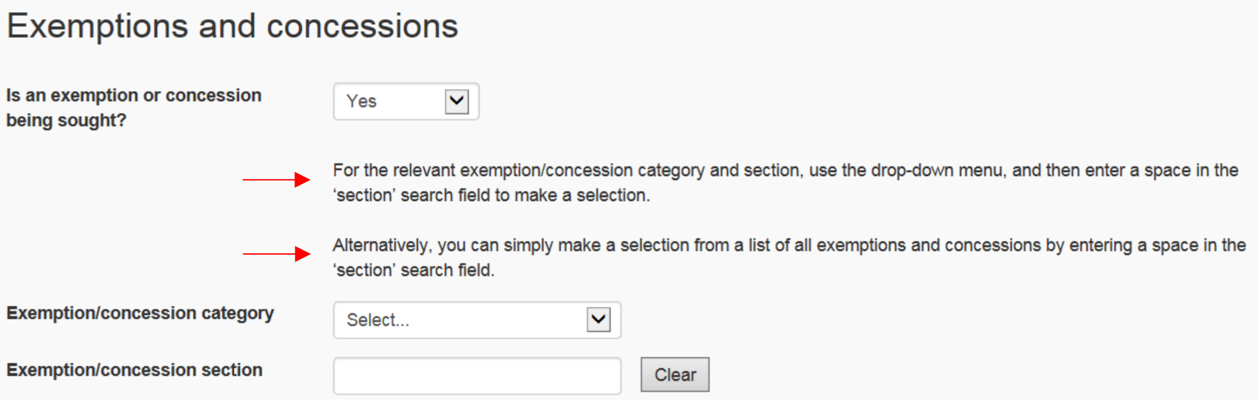
Complete the fields in the Nominated contact screen by using the *Populate from transferee* drop-down menu (if appropriate), or by manually entering the required information.

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.



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.