

Change in beneficial ownership declaration

This declaration must be completed for transactions that result in a change in beneficial ownership of dutiable property on or after 19/05/2022 (other than an excluded transaction).

Use form ODA 081 for the Grant of an Option and process via Electronic Duties Returns (EDR).

Note:

- If there is more than one transferee, each transferee must complete their own declaration.
- Duties Client Identification must be provided for each transferee.
- A separate purchaser/transferee declaration is not required for this transaction.
- Under the *Taxation Administration Act 1996*, you are required to provide all relevant information to enable duty to be assessed on a dutiable transaction. It is an offence to provide false or misleading information.
- This form may be completed online.

Part A – Transferee details

For Individuals

1.1 Full name
1.2 Date of birth DD/MM/YYYY
1.3 Address for correspondence
1.4 Contact phone no. ()
1.5 Email address

For Non-Individuals: Corporations or Government

1.6 Name of Corporations/Government
1.7 ACN/ABN/ARBN/Organisation number.
1.8 Authorised officer
1.9 Address for Correspondence
1.10 Contact phone no. ()
1.11 Email address

2.1 Is the transferee acting as trustee?

Yes No (go to Part 3.1)

Please select the type of trust the trustee is acting for:

Unit trust Discretionary trust Fixed trust Super fund Other trust

If the trust is a unit trust, fixed trust, discretionary trust or superannuation fund, provide the name of the trust. If any other type of trust (e.g. bare trust) provide the name of the beneficiaries (i.e real purchaser/s).

Name of trust/beneficiaries

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3.1 Are the transferee/s and the transferor/s associated persons*?

Yes No

*Refer to the *Duties Act 1997* (NSW) for the definition of associated persons.

Part B – Transaction details

4.1 Date of dutiable transaction (execution date) DD/MM/YYYY

5.1 The change in beneficial ownership results from (tick one):

- the creation of dutiable property
- the extinguishment of dutiable property
- a change in equitable interest in dutiable property
- dutiable property becoming the subject of a trust
- dutiable property ceasing to be the subject of a trust

6.1 Dutiable value* \$

*Dutiable value – the greater of:

- (a) the consideration for the dutiable transaction including any GST paid or payable, or
- (b) the unencumbered value of the dutiable property

**Evidence of value will be required for most transactions. See Revenue Ruling DUT 012v3.

7.1 Property details

Plan type* Plan no. Sub-folio Lot no. Section no.

*Enter DP for Deposited Plan; SP for Strata Plan.

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Note: For transactions involving unregistered plans, include the parent title information. For multiple properties, please attach an annexure.

8.1 Type of land acquired

Residential Non-residential Mixed use % If mixed use, what is the percentage of residential use?

Please select the type of land usage below

Residential use		Non-residential use	
<input type="checkbox"/>	House – owner occupied	<input type="checkbox"/>	Office
<input type="checkbox"/>	House – rental	<input type="checkbox"/>	Industrial (factory warehouse)
<input type="checkbox"/>	Strata – owner occupied	<input type="checkbox"/>	Retail
<input type="checkbox"/>	Strata – rental	<input type="checkbox"/>	Vacant land – non residential
<input type="checkbox"/>	Company title – owner occupied	<input type="checkbox"/>	Farm or other primary production
<input type="checkbox"/>	Company title – rental	<input type="checkbox"/>	Other
<input type="checkbox"/>	Vacant land – residential	<input type="checkbox"/>	Commercial residential 104I(2)
<input type="checkbox"/>	Farm or other primary production		
<input type="checkbox"/>	Other – (permanent house boat mooring, permanent caravan park site)		

Part C – Declaration by transferee (liable party)

I declare the required supporting evidence exists and will be presented to Revenue NSW upon request.

Under the *Taxation Administration Act 1996*, it is an offence to give false or misleading information. I declare that all information provided is true and correct in every particular.


Name	
Declared at (place)	on (date) DD/MM/YYYY

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Contact details


 1300 139 814* (Monday – Friday, 8.30 am – 5.00 pm)

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 Help in community languages is available

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