

Estate or trust beneficiary details

2020

Income Tax Act 2007	2020
Use this form for the 2020 tax year only. Read pages 43 to 48 of the IRC	· · ·
Complete this form and attach it to the top of page 3 of the IR6 estate Remember - the combined totals of Boxes 26H must equal Box 22B of	
Estate or trust name	IRD number
	(8 digit numbers start in the second box. 1 2 3 4 5 6 7 8)
Beneficiary's full name	Date of birth Day Month Year
Beneficiary's full address	
Beneficiary's IRD number	Calculate tax on taxable income in Box 26H - see page 46 of the guide.
26A	26K \$, , , , , , , , , , , , , , , , , ,
Is the beneficiary a non-resident for tax purposes? Yes - special rules apply. See pages 43 to 44 of the guide.	Overseas tax paid 26L \$
Allocation of income Interest	Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$
26C \$	Imputation credits
Dividends 26D \$	Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is
Māori authority distributions 26E \$	greater than 26M print 0.00 in Box 26O. 26O \$
Overseas income	RWT and other tax credits (exclude any amounts shown in Boxes 26L and 26N) 26P \$
26F \$ Other income	Subtract Box 26P from Box 26O. Print your answer in Box 26Q - if the result is negative, put a minus sign in the last box.
26G \$	26Q \$, , , , , , , , , , , , , , , , , ,
Taxable income (sum of Boxes 26C to 26G) 26H \$	Calculate tax on Box 26J at 45 cents in the dollar
Is the estate or trust paying the tax on the beneficiary's income?	Add Boxes 26Q and 26R. Print your answer in Box 26S - if the result is negative,
261 No Yes (if no, only complete boxes 26L, 26N, 26P)	put a minus sign in the last box. Total tax payable on beneficiary's income.
Taxable distribution by non-complying trust 26] \$	If Box 26S is negative, tick credit or if positive, tick debit.
, , ,	(Tick one) Credit Debit
Beneficiary's full name	Date of birth
	Day Month Year
Beneficiary's full address	
Beneficiary's IRD number 26A	Calculate tax on taxable income in Box 26H - see page 46 of the guide.
Is the beneficiary a non-resident for tax purposes? No Yes - special rules apply. See pages 43 to 44 of	Overseas tax paid
Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income	Subtract Box 26L from Box 26K. Print your answer in Box 26M.
Interest \$	26M \$, , , , , , , , , , , , , , , , , ,
Dividends	Imputation credits 26N \$
26D) \$	Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is greater than 26M print 0.00 in Box 26O.
Māori authority distributions 26E \$	260 \$
Overseas income 26F \$	RWT and other tax credits (exclude any amounts shown in Boxes 26L and 26N) 26P \$
Other income	Subtract Box 26P from Box 26O. Print your answer in Box 26Q - if the result is negative, put a minus sign in the last box.
26G \$, , , , , , , , , , , , , , , , , ,	26Q \$
Taxable income (sum of Boxes 26C to 26G) 26H \$	Calculate tax on Box 26J at 45 cents in the dollar
Is the estate or trust paying the tax on the beneficiary's income?	26R \$, , , , , , , , , , , , , , , , , ,
No Yes (if no, only complete boxes 26L, 26N, 26P)	

	put a minus sign in the last box. Total tax payable on beneficiary's income.
Taxable distribution by non-complying trust	265 \$
26] \$, , , ,	If Box 26S is negative, tick credit or if positive, tick debit.
	(Tick one) Credit Debit
Beneficiary's full name	Date of birth
Beneficiary's full address	Day Month Year
	Calculate two as prouble in a sure in Day 2011, and a second of the suride
Beneficiary's IRD number 26A	Calculate tax on taxable income in Box 26H - see page 46 of the guide. 26K \$
Is the beneficiary a non-resident for tax purposes? No Yes - special rules apply. See pages 43 to 44 of	Overseas tax paid 26L \$
the guide. Allocation of income	Subtract Box 26L from Box 26K. Print your answer in Box 26M.
26C \$	26M \$, , , , , , , , , , , , , , , , , ,
Dividends	26N \$
26D \$, , , , , , , , , , , , , , , , , ,	Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is greater than 26M print 0.00 in Box 26O.
26E \$	260 \$, ,
Overseas income	RWT and other tax credits (exclude any amounts shown in Boxes 26L and 26N) 26P \$
Other income	Subtract Box 26P from Box 26O. Print your answer in Box 26Q - if the result is negative, put a minus sign in the last box.
26G \$, , , , , , , , , , , , , , , , , ,	26Q \$
Taxable income (sum of Boxes 26C to 26G) 26H \$	Calculate tax on Box 26J at 45 cents in the dollar
Is the estate or trust paying the tax on the beneficiary's income?	26R \$
No Yes (if no, only complete boxes 26L, 26N, 26P)	Add Boxes 26Q and 26R. Print your answer in Box 26S - if the result is negative, put a minus sign in the last box. Total tax payable on beneficiary's income.
Taxable distribution by non-complying trust	265 \$, , , , , , , , , , , , , , , , , ,
26] > \$, , , , , , , , , , , , , , , , , ,	If Box 26S is negative, tick credit or if positive, tick debit. (Tick one) Credit Debit
	(Tick Offe) Credit Debit
Beneficiary's full name	Date of birth Day Month Year
Beneficiary's full address	Day Month
Beneficiary's IRD number	Calculate tax on taxable income in Box 26H - see page 46 of the guide.
26A	26K \$
	2017
Is the beneficiary a non-resident for tax purposes? No Yes - special rules apply. See pages 43 to 44 of	Overseas tax paid
26B No Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M.
26B No Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income Interest	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$
26B No Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income Interest 26C \$ Dividends	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$ Imputation credits 26N \$
26B No Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income Interest 26C \$ Dividends 26D \$	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$ Imputation credits
26B No Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income Interest 26C \$ Dividends	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$ Imputation credits 26N \$ Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is greater than 26M print 0.00 in Box 26O. 26O \$
26B No Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income Interest 26C \$ Dividends 26D \$ Māori authority distributions 26E \$ \$ Overseas income	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$ Imputation credits 26N \$ Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is greater than 26M print 0.00 in Box 26O.
Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income Interest 26C \$ Dividends 26D \$ Māori authority distributions 26E \$ Overseas income 26F \$ Other income	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$ Imputation credits 26N \$ Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is greater than 26M print 0.00 in Box 26O. 26O \$ RWT and other tax credits (exclude any amounts shown in Boxes 26L and 26N)
Allocation of income Interest 26C \$ Dividends 26D \$ Māori authority distributions 26E \$ Overseas income 26F \$ Other income 26G \$ Other income 26G \$ Other income	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$ Imputation credits 26N \$ Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is greater than 26M print 0.00 in Box 26O. 26O \$ RWT and other tax credits (exclude any amounts shown in Boxes 26L and 26N) 26P \$ Subtract Box 26P from Box 26O. Print your answer in Box 26Q - if the result is negative, put a minus sign in the last box. 26Q \$
Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income Interest 26C \$ Dividends 26D \$ Māori authority distributions 26E \$ Overseas income 26F \$ Other income	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$ Imputation credits 26N \$ Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is greater than 26M print 0.00 in Box 26O. 26O \$ RWT and other tax credits (exclude any amounts shown in Boxes 26L and 26N) 26P \$ Subtract Box 26P from Box 26O. Print your answer in Box 26Q - if the result is negative, put a minus sign in the last box. 26Q \$ Calculate tax on Box 26J at 45 cents in the dollar
Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income Interest 26C \$ Dividends 26D \$ Māori authority distributions 26E \$ Overseas income 26F \$ Other income 26G \$ Taxable income (sum of Boxes 26C to 26G)	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$ Imputation credits 26N \$ Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is greater than 26M print 0.00 in Box 26O. 26O \$ RWT and other tax credits (exclude any amounts shown in Boxes 26L and 26N) 26P \$ Subtract Box 26P from Box 26O. Print your answer in Box 26Q - if the result is negative, put a minus sign in the last box. 26Q \$ Calculate tax on Box 26J at 45 cents in the dollar
Allocation of income Interest 26C \$ Dividends 26B \$ No Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income Interest 26C \$ Dividends 26D \$ Māori authority distributions 26E \$ Overseas income 26F \$ Other income 26G \$ Taxable income (sum of Boxes 26C to 26G) 26H \$ Is the estate or trust paying the tax on the beneficiary's income? Yes (if no, only complete boxes 26L, 26N, 26P)	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$ Imputation credits 26N \$ Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is greater than 26M print 0.00 in Box 26O. 26O \$ RWT and other tax credits (exclude any amounts shown in Boxes 26L and 26N) 26P \$ Subtract Box 26P from Box 26O. Print your answer in Box 26Q - if the result is negative, put a minus sign in the last box. 26Q \$ Calculate tax on Box 26J at 45 cents in the dollar 26R \$ Add Boxes 26Q and 26R. Print your answer in Box 26S - if the result is negative, put a minus sign in the last box. Total tax payable on beneficiary's income.
Allocation of income Interest 26C \$ Dividends 26D \$ Māori authority distributions 26E \$ Other income 26G \$ Taxable income (sum of Boxes 26C to 26G) 26H \$ Is the estate or trust paying the tax on the beneficiary's income? Yes (if no, only complete boxes 26L, 26N, 26P) Taxable distribution by non-complying trust	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$ Imputation credits 26N \$ Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is greater than 26M print 0.00 in Box 26O. 26O \$ RWT and other tax credits (exclude any amounts shown in Boxes 26L and 26N) 26P \$ Subtract Box 26P from Box 26O. Print your answer in Box 26Q - if the result is negative, put a minus sign in the last box. 26Q \$ Calculate tax on Box 26J at 45 cents in the dollar 26R \$ Add Boxes 26Q and 26R. Print your answer in Box 26S - if the result is negative, put a minus sign in the last box. Total tax payable on beneficiary's income.
Allocation of income Interest 26C \$ Dividends 26B \$ No Yes - special rules apply. See pages 43 to 44 of the guide. Allocation of income Interest 26C \$ Dividends 26D \$ Māori authority distributions 26E \$ Overseas income 26F \$ Other income 26G \$ Taxable income (sum of Boxes 26C to 26G) 26H \$ Is the estate or trust paying the tax on the beneficiary's income? Yes (if no, only complete boxes 26L, 26N, 26P)	Overseas tax paid 26L \$ Subtract Box 26L from Box 26K. Print your answer in Box 26M. 26M \$ Imputation credits 26N \$ Subtract Box 26N from Box 26M. Print your answer in Box 26O. If 26N is greater than 26M print 0.00 in Box 26O. 26O \$ RWT and other tax credits (exclude any amounts shown in Boxes 26L and 26N) 26P \$ Subtract Box 26P from Box 26O. Print your answer in Box 26Q - if the result is negative, put a minus sign in the last box. 26Q \$ Calculate tax on Box 26J at 45 cents in the dollar 26R \$ Add Boxes 26Q and 26R. Print your answer in Box 26S - if the result is negative, put a minus sign in the last box. Total tax payable on beneficiary's income.

To get more forms go to ird.govt.nz or see page 61 of the guide for our self-service numbers.