

Estate or trust beneficiary details

2021

Income Tax Act 2007	2021
Use this form for the 2021 tax year only. See the guide for further deta	ails before completing this form.
Complete this form and attach it to the top of page 3 of the IR6 estate	
Remember - the combined totals of Boxes 27H must equal Box 20A of	the IR6 return.
Estate or trust name	IRD number
	(8 digit numbers start in the second box. 1 2 3 4 5 6 7 8)
D C: / CII	D. (1) 1
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 27H - See the guide for further details.
27A	27K \$, , , , , , , , , , , , , , , , , ,
Is the beneficiary a non-resident for tax purposes?	Overseas tax paid
No Yes - special rules apply. See the guide for further details.	27L \$
Allocation of income	Subtract Box 27L from Box 27K. Print your answer in Box 27M.
Interest	27M \$
27C \$	Imputation credits
Dividends	27N \$
27D \$	Subtract Box 27N from Box 27M. Print your answer in Box 27O. If 27N is
Māori authority distributions	greater than 27M print 0.00 in Box 27O.
	270 \$
, , , , , ,	RWT and other tax credits (exclude any amounts shown in Boxes 27L and 27N)
Overseas income	27P \$
27F \$.	
Other income	Subtract Box 27P from Box 27O. Print your answer in Box 27Q - if the result is negative, put a minus sign in the last box.
27G \$	27Q \$
Taxable income (sum of Boxes 27C to 27G)	Calculate tax on Box 27J at 45 cents in the dollar
27H \$	
, , , ,	27R \$, , ,
Is the estate or trust paying the tax on the beneficiary's income?	Add Boxes 27Q and 27R. Print your answer in Box 27S - if the result is negative,
Yes (if no, only complete boxes 27L, 27N, 27P)	put a minus sign in the last box. Total tax payable on beneficiary's income.
Taxable distribution by non-complying trust	275 \$, , , , , , , , , , , , , , , , , ,
27] \$ \$	If Box 27S is negative, tick credit or if positive, tick debit.
<u> </u>	(Tick one) Credit Debit
Beneficiary's full name	Date of birth
	Day Month Year
Beneficiary's full address	
Daniel Strawy IND according	Colonian and an analysis are significant and an in-
Beneficiary's IRD number	Calculate tax on taxable income in Box 27H - See the guide for further details.
27A	27K \$, , , , , , , , , , , , , , , , , ,
Is the beneficiary a non-resident for tax purposes?	Overseas tax paid
Yes - special rules apply. See the guide for	27L \$
further details. Allocation of income	Subtract Box 27L from Box 27K. Print your answer in Box 27M.
Interest	27M \$
27C \$	Imputation credits
Dividends	27N \$
27D \$	Subtract Box 27N from Box 27M. Print your answer in Box 27O. If 27N is
Māori authority distributions	greater than 27M print 0.00 in Box 27O.
	270 \$
27E \$, , , , , , , , , , , , , , , , , ,	RWT and other tax credits (exclude any amounts shown in Boxes 27L and 27N)
Overseas income	27P \$
27F \$.	
Other income	Subtract Box 27P from Box 27O. Print your answer in Box 27Q - if the result is negative, put a minus sign in the last box.
27G) \$	
Taxable income (sum of Boxes 27C to 27G)	, , , , , , , , , , , , , , , , , ,
27H \$	Calculate tax on Box 27J at 45 cents in the dollar
	27R \$, , , , , , , , , , , , , , , , , ,
Is the estate or trust paying the tax on the beneficiary's income?	. ,
No Yes (if no, only complete boxes 27L, 27N, 27P)	

	Add Boxes 27Q and 27R. Print your answer in Box 27S - 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	275 \$
27] 🕨 💲 🗼 ,	If Box 27S 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	Calculate tax on taxable income in Box 27H - See the guide for further details.
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Is the beneficiary a non-resident for tax purposes? Yes - special rules apply. See the guide for	Overseas tax paid
Yes - special rules apply. See the guide for further details. Allocation of income	Subtract Box 27L from Box 27K. Print your answer in Box 27M.
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27C \$, , Dividends	Imputation credits
27D \$	Subtract Box 27N from Box 27M. Print your answer in Box 27O. If 27N is
Māori authority distributions	greater than 27M print 0.00 in Box 27O.
27E \$, , , ,	RWT and other tax credits (exclude any amounts shown in Boxes 27L and 27N)
Overseas income \$	27P \$
Other income	Subtract Box 27P from Box 27O. Print your answer in Box 27Q - if the result is negative, put a minus sign in the last box.
27G \$	27Q \$
Taxable income (sum of Boxes 27C to 27G)	Calculate tax on Box 27J at 45 cents in the dollar
27H \$ Is the estate or trust paying the tax on the beneficiary's income?	27R \$, , , , , , , , , , , , , , , , , ,
No Yes (if no, only complete boxes 27L, 27N, 27P)	Add Boxes 27Q and 27R. Print your answer in Box 27S - 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	27S \$, , , , , , , , , , , , , , , , , , ,
27] \$, , .	If Box 27S is negative, tick credit or if positive, tick debit. (Tick one) Credit Debit
Beneficiary's full name	Date of birth
Beneficiary's full name Beneficiary's full address	Date of birth
Beneficiary's full address Beneficiary's IRD number	Date of birth Day Month Year Calculate tax on taxable income in Box 27H - See the guide for further details.
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