

Tailored tax code or tailored tax rate application

Year ending 31 March

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Complete this if you:

- need to apply for a tailored tax code, or
- use a WT tax code and need to apply for a tailored tax rate.

To help with the processing of your application, make sure you have answered all the questions relevant to you and have signed this form. We'll send this application back if any information is missing.

1. Your IRD number (8 digit numbers start in the second box. **1 2 3 4 5 6 7 8**)

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2. Your name or the name of the partnership, trust or company (do not show a trade name).

Mr
 Mrs
 Miss
 Ms

3. Your postal address

Street address or PO Box number
Suburb, box lobby or RD

4. Your contact phone number ()

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5. Tick this box if you're applying for a 0% tailored tax rate **and** you:

- are a contractor working for a labour hire business (eg recruitment agency) and are receiving schedular payments using the WT tax code (not salary or wages), and
- have a good record of filing returns and making payments on time, covering a period of at least the last 12 months.

Let us know the name of the payer under a labour hire arrangement ie. the name of the recruitment agency

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If you tick this box go straight to completing the declaration on the back of the form.

6. Your NZ Super/Veteran's pension number from Work and Income, if applicable

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7. Give the reason why you're applying for a tailored tax code or rate. If you have losses to carry forward, detail them here. Please see the end of this form for situations where tailored tax codes do not apply.

8. Tick one option to show which income you want your tailored tax code or rate to apply to. You can use your tailored tax code or tax rate for 1 employer. To use a tailored tax code or tax rate for another employer you can complete another application. Which employer would you like this tailored tax code or tax rate for:

NZ Super/Veteran's pension
 Employment (print the name of your employer below).

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9. In the boxes below estimate all the income you will receive before tax, between 1 April and 31 March for the tax year you have specified above.

Gross salary and wages. Show your employer's name and the amount you'll earn. Include taxable benefits or weekly ACC payments here. If you have more than three employers, use a separate sheet of paper and attach it to this form.

Employer's name		IRD number		
\$		Tax code		
Will you be employed for the full year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If not, enter dates: Start		Stop
Employer's name		IRD number		
\$		Tax code		
Will you be employed for the full year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If not, enter dates: Start		Stop
Employer's name		IRD number		
\$		Tax code		

Will you be employed for the full year? Yes No If not, enter dates: Start Stop

Gross annual NZ Super/Veteran's pension (don't include any overseas social security pensions such as the UK National Retirement Pension) Gross income \$

Type of NZ Super/Veteran's pension you are receiving Single (living alone) Single (sharing) Married, in a civil union or de facto relationship
Will you be receiving for the full year? Yes No If not, enter dates: Start Stop

Gross overseas social security pensions or benefits \$

Will you be receiving for the full year? Yes No If not, enter dates: Start Stop

Gross overseas private pensions \$

Will you be receiving for the full year? Yes No If not, enter dates: Start Stop

Schedular payments (eg commission to real estate and insurance agents). Expenses \$ Gross Income \$

Current tax rate being deducted from your schedular payments

Gross interest

Show the tax rate that will be deducted from the interest 10.5% 17.5% 30% 33% 39% 45%
If you have not provided your IRD number to the payer \$

Gross dividends \$

Provisional tax payments. If you're going to make any provisional tax payments show the amount here. \$

Note: Contact us if you have been charged provisional tax but you're applying for a tailored tax code or rate instead. You may need to re-estimate your provisional tax liability.

Other income or losses from partnerships, self-employment, estates, overseas, interest or dividends, or rental losses (excluding most residential, see below).

Note: If this is your first application and you haven't filed tax returns including losses from these sources, you'll need to provide documents showing how you calculated the amount you're claiming for.

Type of income \$

Estimate the amount of tax, if any, which **will be deducted** from this **other** income. \$

Lump sum payments, such as ACC or redundancy. \$

Declaration

I declare that the information on this form is true and correct.

Signature

/ /
Date

Notes

- This rate is based on your estimates and may not be the final amount you owe. Final tax can only be worked out on the actual figures shown when you receive your income tax assessment.
- Complete this application in myIR or send this completed form to us at the following postal address:
Inland Revenue, PO Box 39010, Wellington Mail Centre, Lower Hutt 5045

Tailored tax codes and rates don't apply to:

- student loan repayments

You can no longer use a tailored tax code to change the amount of your student loan repayment deductions. For more information about working in New Zealand with a student loan go to ird.govt.nz/studentloans

- residential rental losses

You may have applied for a tailored tax code or rate in the past because you had residential rental losses to offset against other income like salary and wages. Most of these losses are now ring-fenced, which means residential property deductions can generally only be used to offset income from residential property. For more information go to ird.govt.nz/ring-fencing

