

Annual imputation return

Income Tax Act 2007 • Tax Administration Act 1994

IRD number

IR4J 2020

1 April 2019 to 31 March 2020

Use this form only if you need to file the company's imputation return separately from the income tax return, or you are an Australian company that made a trans-Tasman election or a group representative of a newly elected imputation group. If you want to file them together, please use the IR4 return, which combines the income tax and imputation returns. Send your completed return to the address on page 2.

1. Print the company's IRD number in Box 1, if not shown above.



IRD number

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

2. Print the company's name in Box 2, if not shown above.

2

3. Print the company's postal address in Box 3, if not shown above. See page 6 of the guide. Do not print your tax agent's address here.

3

Please put street address or PO Box number **above** and suburb, box lobby or RD, town or city **below**

4. If the street address is **different from the postal address**, print it in full in Box 4.

4

Please put street address **above** and suburb, town or city and region **below**

5. Print the daytime phone number in Box 5.

5

Prefix

Phone number

Annual imputation return

Complete for the tax year 1 April 2019 to 31 March 2020 regardless of your accounting year.

6. Print the **opening balance at 1 April 2019** in Box 6. This is the same as the closing balance at 31 March 2019. See page 7 of the guide.

6 ▶ \$, , .
 (Tick one) Credit Debit

7. **Credits** - see pages 7 and 8 of the guide.

Payments

Income tax paid for 1989 and subsequent years 7A ▶ \$, , .
 FDP paid - see page 7 of the guide 7B **No longer applicable**
 RWT on interest received 7C ▶ \$, , .

Imputation

Imputation credits attached to dividends received 7D ▶ \$, , .
 If you are a public unit trust or group investment fund and maintain a supplementary available subscribed capital account (SASCA), please see page 9 of the guide.
 Other (please specify) Other credits 7E ▶ \$, , .
 Add Boxes 7A to 7E. Print the total in Box 7F. This is the **total credits**. 7F ▶ \$, , .

8. **Debits** - see page 10 of the guide.

Refunds

Income tax refunded for 1989 and subsequent years 8A ▶ \$, , .
 FDP refunds - see page 10 of the guide 8B **No longer applicable**

Imputation

Imputation credits attached to dividends paid 8C ▶ \$, , .
 Other, including change of shareholding adjustment (please specify) Other debits 8D ▶ \$, , .
 Add Boxes 8A to 8D. Print the total in Box 8E. This is the **total debits**. 8E ▶ \$, , .

9. **Closing balance at 31 March 2020** 9 ▶ \$, , .
 If Box 6 is a credit, add Box 6 and Box 7F, then subtract Box 8E.
 If Box 8E is smaller than the total of Box 6 and Box 7F, Box 9 is a credit.
 If Box 6 is a debit, add Box 6 and Box 8E, then subtract Box 7F.
 If Box 7F is smaller than the total of Box 6 and Box 8E, Box 9 is a debit.
 (Tick one) Credit Debit

Adjustments to reduce "Further income tax payable". See page 11 of the guide. 9A ▶ \$, , .
Further income tax payable. Subtract Box 9A from Box 9. Print the total in Box 9B. 9B ▶ \$, , .

10. **Imputation penalty tax** - see page 12 of the guide. 10 ▶ \$, , .
 If Box 9B is a debit, multiply it by 0.1 (10%). Print your answer in Box 10.
 Add Box 9B and Box 10. Print your answer in Box 10A. 10A ▶ \$, , .
This is the total payable and is due by 20 June 2020.

There are penalties for not putting in a tax return or for putting in a false return.

Declaration

Read this declaration and sign the return.

This is a true and correct return for the year ended 31 March 2020.

Signature / /
 Date

Send the completed return to: Inland Revenue, PO Box 39090, Wellington Mail Centre Lower Hutt 5045.
 For a full list of addresses go to ird.govt.nz/contact-us

OFFICE USE ONLY 19 ▶ Correspondence indicator