

## Estate or trust beneficiary details

2018

T 4 : 0007

Income Tax Act 2007	
Use this form for the 2018 tax year only. Read pages 35 to 40 of the IRC Complete this form and attach it to the top of page 3 of the IRC Remember - the combined totals of Boxes 24H must equal Box 18A of	e or trust income tax return.
Estate or trust name	IRD number  (8 digit numbers start in the second box. 12345678)
	(o digit numbers start in the second box. 7 2 3 7 3 0 7 8 )
Beneficiary's full name	Date of birth  Day Month Year
Beneficiary's full address	
Beneficiary's IRD number  24A  Is the beneficiary a non-resident for tax purposes?  24B  No  Yes - special rules apply. See pages 37 and 38 of the guide.  Allocation of income Interest  24C  \$  Dividends  24D  \$  Coverseas income  24F  \$  Other income  24G  \$  Taxable income (sum of Boxes 24C to 24G)  24H  \$  Is the estate or trust paying the tax on the beneficiary's income?  24I  No  Yes (if no, only complete boxes 24L, 24N, 24P)  Taxable distribution by non-complying trust  24J  \$  \$  Allocation of income  18   Yes - special rules apply. See pages 37 and 38 of the guide.  Allocation of income  18   Yes - special rules apply. See pages 37 and 38 of the guide.  Allocation of income  18   Yes - special rules apply. See pages 37 and 38 of the guide.  Allocation of income  18   No  Yes - special rules apply. See pages 37 and 38 of the guide.  Allocation of income  18   No  Yes (if no, only complete boxes 24L, 24N, 24P)  Taxable distribution by non-complying trust	Calculate tax on taxable income in Box 24H - see page 38 of the guide.  24K \$  Overseas tax paid  24L \$  Subtract Box 24L from Box 24K. Print your answer in Box 24M.  24M \$  Imputation credits  24N \$  Subtract Box 24N from Box 24M. Print your answer in Box 24O. If 24N is greater than 24M print 0.00 in Box 24O.  24O \$  RWT and other tax credits (exclude any amounts shown in Boxes 24L and 24N)  24P \$  Subtract Box 24P from Box 24O. Print your answer in Box 24Q - if the result is negative, put a minus sign in the last box.  24Q \$  Calculate tax on Box 24J at 45 cents in the dollar  24R \$  Add Boxes 24Q and 24R. Print your answer in Box 24S - if the result is negative, put a minus sign in the last box. Total tax payable on beneficiary's income.  24S \$  If Box 24S 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 24H - see page 38 of the guide.
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24H \$	
Is the estate or trust paying the tax on the beneficiary's income?	24R \$ , , , ,
No Yes (if no, only complete boxes 24L, 24N, 24P)	

Taxable distribution by non-complying trust	Add Boxes 24Q and 24R. Print your answer in Box 24S - if the result is negative, put a minus sign in the last box. Total tax payable on beneficiary's income.
24) \$ , , , , , , , , , , , , , , , , , ,	If Box 24S 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	
Panafician's IPD number	Calculate tay on tayable income in Pay 24H can page 29 of the guide
Beneficiary's IRD number	Calculate tax on taxable income in Box 24H - see page 38 of the guide.
24A	24K \$ , , , , , , , , , , , , , , , , , ,
Is the beneficiary a non-resident for tax purposes?	Overseas tax paid
Yes - special rules apply. See pages 37 and 38 of the guide.	24L \$ , , , , , , , , , , , , , , , , , ,
Allocation of income	Subtract Box 24L from Box 24K. Print your answer in Box 24M.
Interest	24M \$ , , , , , , , , , , , , , , , , , ,
24C) \$ , , .	Imputation credits
Dividends	24N \$
24D \$ , , , , , , , , , , , , , , , , , ,	Subtract Box 24N from Box 24M. Print your answer in Box 24O. If 24N is
Māori authority distributions	greater than 24M print 0.00 in Box 24O.
24E \$	240 \$ , ,
Overseas income	RWT and other tax credits (exclude any amounts shown in Boxes 24L and 24N)
24F \$	24P \$ , , , , , , , , , , , , , , , , , ,
Other income	Subtract Box 24P from Box 24O. Print your answer in Box 24Q - if the result is negative, put a minus sign in the last box.
24G \$	
Taxable income (sum of Boxes 24C to 24G)	24Q \$ , , , , , , , , , , , , , , , , , ,
24H \$	Calculate tax on Box 24J at 45 cents in the dollar
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	24S \$
Taxable distribution by non-complying trust	If Box 24S is negative, tick credit or if positive, tick debit.
241 \$	IT BOX 745 IS DEGATIVE TICK CREAIT OF IT DOSITIVE TICK APPLIT
, , , , , , , , , , , , , , , , , , ,	
, , , , , , , , , , , , , , , , , , ,	(Tick one) Credit Debit
Beneficiary's full name	(Tick one) Credit Debit
	(Tick one) Credit Debit  Date of birth
Beneficiary's full name  Beneficiary's full address	(Tick one) Credit Debit  Date of birth  Day Month Year
Beneficiary's full name  Beneficiary's full address  Beneficiary's IRD number	(Tick one) Credit Debit  Date of birth  Day Month Year  Calculate tax on taxable income in Box 24H - see page 38 of the guide.
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