

Estate or trust beneficiary details

2019

Income Tax Act 2007	2017
Use this form for the 2019 tax year only. Read pages 37 to 42 of the IRC Complete this form and attach it to the top of page 3 of the IRC estate	
Remember - the combined totals of Boxes 24H must equal Box 18A of	
Estate or trust name	IRD number
	(8 digit numbers start in the second box. 12345678)
Donaficion de full manage	Date of birth
Beneficiary's full name	Date of Dirth Day Month Year
Beneficiary's full address	
Beneficiary's IRD number	Calculate tax on taxable income in Box 24H - see page 40 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.
24C) \$	24M \$, , , , , , , , , , , , , , , , , ,
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 \$, , , .	Subtract Box 24P from Box 24O. Print your answer in Box 24Q - if the result
Other income	is negative, put a minus sign in the last box.
246) \$	24Q \$, , , , , , , , , , , , , , , , , ,
Taxable income (sum of Boxes 24C to 24G) 24H \$	Calculate tax on Box 24J at 45 cents in the dollar
Is the estate or trust paying the tax on the beneficiary's income?	24R \$
241 No Yes (if no, only complete boxes 24L, 24N, 24P)	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.
Taxable distribution by non-complying trust	245 \$
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	
Beneficiary's IRD number	Calculate tax on taxable income in Box 24H - see page 40 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.
24C) \$	24M \$, , , , , , , , , , , , , , , , , ,
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 \$, , .	RWT and other tax credits (exclude any amounts shown in Boxes 24L and 24N)
Overseas income	\$ \$
24F) \$	Subtract Box 24P from Box 24O. Print your answer in Box 24Q - if the result
Other income 24G \$	is negative, put a minus sign in the last box.
Taxable income (sum of Boxes 24C to 24G)	24Q \$, , , , , , , , , , , , , , , , , ,
24H \$	Calculate tax on Box 24J at 45 cents in the dollar
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	
Beneficiary's IRD number	Calculate tax on taxable income in Box 24H - see page 40 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.
1nterest 24C \$	24M \$, , , , , , , , , , , , , , , , , ,
Dividends	Imputation credits
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 \$	24Q \$
Taxable income (sum of Boxes 24C to 24G)	Calculate tax on Box 24) at 45 cents in the dollar
24H \$	24R \$
Is the estate or trust paying the tax on the beneficiary's income?	Add Boxes 24Q and 24R. Print your answer in Box 24S - if the result is negative,
No Yes (if no, only complete boxes 24L, 24N, 24P)	put a minus sign in the last box. Total tax payable on beneficiary's income.
Taxable distribution by non-complying trust	245 \$, , ,
24) \$, , , , , , , , , , , , , , , , , ,	If Box 24S is negative, tick credit or if positive, tick debit.
	(Tick one) Credit Debit
Beneficiary's full name	Date of birth
	Date of birth Day Month Year
Beneficiary's full address Beneficiary's full address	
Beneficiary's full address	Day Month Year
Beneficiary's full address Beneficiary's IRD number 24A Is the beneficiary a non-resident for tax purposes?	Calculate tax on taxable income in Box 24H - see page 40 of the guide. 24K \$ Overseas tax paid
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