

Income Tax Act 2007

- Use this form for the 2023 tax year only. See the guide for further details before completing this form.
- Complete this form and attach it to the top of page 3 of the IR6 estate or trust income tax return.

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

**Settlor details**

Settlor's full name  Settlor's date of birth or commencement date   
Day Month Year

Settlor's jurisdiction of tax residency

**1**  Jurisdiction does not issue tax identification numbers (TINs)  
 TIN not required in Jurisdiction

Settlor's IRD number **2**   
 Settlor's TIN **3**

**Settlements**

**4**  If no settlement has been made by this settlor in this income year tick the box

Cash <b>5</b> \$ <input type="text"/>	Land <b>9</b> \$ <input type="text"/>
Shares / Ownership interests <b>6</b> \$ <input type="text"/>	Buildings <b>10</b> \$ <input type="text"/>
Financial arrangements <b>7</b> \$ <input type="text"/>	Other <b>11</b> \$ <input type="text"/>
Services <b>8</b> \$ <input type="text"/>	Description of 'other' <b>12</b> <input type="text"/>

**13**  If there has been a settlement by this settlor but it has been valued at zero tick the box

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