



## IR3 2021

1 April 2020 to 31 March 2021

- You can complete your return in myIR.
- To see if you need to complete this return go to [ird.govt.nz/end-of-year-tax](http://ird.govt.nz/end-of-year-tax)
- The 2021 IR3 guide is available on our website. To view a copy go to [ird.govt.nz/forms-guides](http://ird.govt.nz/forms-guides)

1 If your IRD number is **not** shown above, print it in Box 1.

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

1 ▶

2 If your correct name is **not** shown above, print it in full in Box 2.

2 ▶ Mr  Mrs  Miss  Ms

Put first names **above** and surname **below**

3 If your correct **postal** address is **not** shown above, print the full address in Box 3.  
Do not print your tax preparers address here. See the guide for further details.

3 ▶

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

4 If your correct **street** address is **not** shown below, print it in full in Box 4.

4 ▶

Put street address **above** and suburb, city, RD or region **below**

5 If your correct date of birth is **not** shown below, print it in Box 5.

5 ▶

Day Month Year

6 If your business industry classification (BIC) code is not shown below or has changed, print it in Box 6. For more information about BIC codes, go to [businessdescription.co.nz](http://businessdescription.co.nz)

6 ▶

7 If your correct daytime phone number is **not** shown below, print it in Box 7.

7 ▶

Prefix Phone number

8 If your correct bank account number is **not** shown below, print it in Box 8. See the guide for further details.

8 ▶

Bank Branch Account number Suffix

9 **Adjustments to your income - student loan and Working for Families Tax Credits customers**

Check the income list on our website [ird.govt.nz/adjust-income](http://ird.govt.nz/adjust-income) to see if you need to make any adjustments. If you have already told us your end of year adjustments, you do not need to do anything further. If you do have adjustments to make, tick Box 9A, complete an **Adjust your income - IR215** form and send it in with your return. See the guide for further details.

9A ▶

10 You may be a non-resident of New Zealand for tax purposes and may need to complete an IR3NR return instead. See the guide for further details.

**Income** Note: If any total is a loss, put a minus sign in the last Box provided.

11 Did you receive **family tax credit** from **Work and Income**? Do not include any payments from Inland Revenue. See the guide for further details.

No  Go to Question 11A Yes  Enter the amount from your Summary of Income below.

Total family tax credit from Work and Income

11 ▶ \$

11A Did you receive **income with tax deducted**, as shown on your Summary of Income? See the guide for further details.

No  Go to Question 12 Yes  Copy the amounts from your Summary of Income to the Boxes below.

Total PAYE deducted

11A ▶ \$

ACC earners' levy

11D ▶ \$

Total tax deducted

11E ▶ \$

Total gross income

11B ▶ \$

Total **income not liable** for ACC earners' levy

11C ▶ \$

See the guide for a list of income not liable for ACC earners' levy (for example NZ Super, income-tested benefits and student allowances).

12 Did you receive income from **schedular payments**, as shown on your Summary of Income? See the guide for further details.

No  Go to Question 13 Yes  Copy the schedular payment totals from your Summary of Income to Boxes 12A and 12B below. Enter any expenses related to schedular payments in Box 12C (**do not include at Box 29**)

Total tax deducted

12A ▶ \$

Total gross payments

12B ▶ \$

Expenses related to schedular payments (**do not include expenses claimed here at Box 29**)

12C ▶ \$

Net schedular payments (Subtract Box 12C from Box 12B)

12D ▶ \$

13 Did you have any **New Zealand interest** paid or credited to you? Include any interest from partnerships, look-through companies and/or trusts. Keep your interest statements or certificates.

No  Go to Question 14 Yes  Print the totals here. See the guide for further details.

Total RWT

13A ▶ \$

Total gross interest

13B ▶ \$

If any of your interest was received from a partnership, look-through company, trust and/or estate, tick 13C.

13C ▶

14 Did you have any **New Zealand dividends** paid or credited to you or did you receive shares instead of dividends? Include any dividends from partnerships, look-through companies and/or trusts. Keep your dividend statements.

No  Go to Question 15 Yes  Print the totals here. See the guide for further details.

Total dividend imputation credits

14 ▶ \$

Total gross dividends

14B ▶ \$

Total dividend RWT credits

14A ▶ \$

If any of your dividends were received from a partnership, look-through company, trust and/or estate, tick 14C.

14C ▶

15 Did you receive any taxable **Māori authority distributions**? Keep your distribution statements.

No  Go to Question 16 Yes  Print the totals here. See the guide for further details.

Total Māori authority credits

15A ▶ \$

Total Māori authority distributions

15B ▶ \$

16 Did you receive any **New Zealand estate or trust income**? Exclude interest, dividends and distributions shown at Questions 13, 14, or 15, as appropriate.

No  Go to Question 17 Yes  Print the totals here. See the guide for further details.

Total tax paid by trustees

16A ▶ \$

Total estate or trust income (excluding amount in Box 16C)

16B ▶ \$

Total taxable distributions from non-complying trusts

16C ▶ \$

17 Did you receive any **overseas income**? Attach proof of overseas tax paid and a letter detailing any overseas losses to the return.

No  Go to Question 18 Yes  Print the totals here. See the guide for further details.

Total overseas tax paid

17A ▶ \$

Total overseas income

17B ▶ \$

If your total overseas income includes a withdrawal and/or transfer from a foreign superannuation scheme, see the guide and tick Box 17C if applicable.

17C ▶

18 Did you receive any **partnership income**? Exclude any income/losses shown at Questions 13, 14, 15, 17, 22, 23, 25, or 27 as appropriate.

No  Go to Question 19 Yes  Print the totals here. See the guide for further details.

Total partnership tax credits

18A ▶ \$

Total active partnership income

18B ▶ \$

19 Did you receive any **look-through company (LTC) income**? Exclude any income/loss shown at Questions 13, 14, 15, 17, 22, 23, 25 and 27.

No  Go to Question 20 Yes  Print the totals here. See the guide for further details.

Total LTC tax credits

19A ▶ \$

Total active LTC income - if this amount is a loss, put a minus sign in the last Box.

19B ▶ \$

Non-allowable deductions this year

19C ▶ \$

Prior years' non-allowable deductions claimed this year

19D ▶ \$

Adjusted LTC income

Either add Boxes 19B and 19C or subtract Box 19D from 19B. Print your answer in Box 19E.

19E ▶ \$

20 Did you receive a **shareholder-employee salary with no tax deducted**?

No  Go to Question 21 Yes  Print the totals here. See the guide for further details.

Total shareholder-employee salary

20 ▶ \$

If you **did not receive** a shareholder-employee salary but may in the future, tick Box 20A.

20A ▶

Shareholder AIM tax credit

20B ▶ \$

If you qualify for WfFTC, and you are a major shareholder working full-time without pay for your close company which earns gross income, see the guide and tick Box 20C if it applies to you.

20C

21 **Tax credit and income subtotal**

Add the blue Boxes 11E, 12A, 13A, 14A, 15A, 16A, 18A, 19A and 20B. Print the total in Box 21A.

Tax credit subtotal

21A ▶ \$

Add the dark red Boxes 11B, 12D, 13B, 14B, 15B, 16B, 16C, 17B, 18B, 19E and 20. Print the total in Box 21B.

Income subtotal

21B ▶ \$

22 Did you receive any **income or incur any expenditure from residential property**?

No  Go to Question 23. Yes  Print the totals below. See the guide for further details.

Select which method you are using (tick one) Portfolio  Individual  Combination

Total residential income

22A ▶ \$

Residential rental deductions

22B ▶ \$

Excess residential rental deductions brought forward

22C ▶ \$

Residential rental deductions claimed this year

22D ▶ \$

Net residential income - if a loss, put a minus sign in the last Box

22E ▶ \$

Excess residential rental deductions carried forward

22F ▶ \$

23 Did you receive any **other rents**? Do not include any income already shown at Question 22.

No  Go to Question 24 Yes  Print the totals here. See the guide for further details.

Net rents

23 ▶ \$





