

Income Tax Act 2007

- Use this form for the 2021 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.
- Remember - the combined totals of Boxes 27H must equal Box 20A of the IR6 return.

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

Beneficiary's full name Date of birth
Day Month Year

Beneficiary's full address

Beneficiary's IRD number
27A ▶

Is the beneficiary a non-resident for tax purposes?
27B ▶ No Yes - special rules apply. See the guide for further details.

Allocation of income

Interest
27C ▶ \$

Dividends
27D ▶ \$

Māori authority distributions
27E ▶ \$

Overseas income
27F ▶ \$

Other income
27G ▶ \$

Taxable income (sum of Boxes 27C to 27G)
27H ▶ \$

Is the estate or trust paying the tax on the beneficiary's income?
27I ▶ No Yes (if no, only complete boxes 27L, 27N, 27P)

Taxable distribution by non-complying trust
27J ▶ \$

Calculate tax on taxable income in Box 27H - See the guide for further details.

27K ▶ \$

Overseas tax paid
27L ▶ \$

Subtract Box 27L from Box 27K. Print your answer in Box 27M.
27M ▶ \$

Imputation credits
27N ▶ \$

Subtract Box 27N from Box 27M. Print your answer in Box 27O. If 27N is greater than 27M print 0.00 in Box 27O.
27O ▶ \$

RWT and other tax credits (exclude any amounts shown in Boxes 27L and 27N)
27P ▶ \$

Subtract Box 27P from Box 27O. Print your answer in Box 27Q - if the result is negative, put a minus sign in the last box.
27Q ▶ \$

Calculate tax on Box 27J at 45 cents in the dollar
27R ▶ \$

Add Boxes 27Q and 27R. Print your answer in Box 27S - if the result is negative, put a minus sign in the last box. Total tax payable on beneficiary's income.
27S ▶ \$

If Box 27S 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
27A ▶

Is the beneficiary a non-resident for tax purposes?
27B ▶ No Yes - special rules apply. See the guide for further details.

Allocation of income

Interest
27C ▶ \$

Dividends
27D ▶ \$

Māori authority distributions
27E ▶ \$

Overseas income
27F ▶ \$

Other income
27G ▶ \$

Taxable income (sum of Boxes 27C to 27G)
27H ▶ \$

Is the estate or trust paying the tax on the beneficiary's income?
27I ▶ No Yes (if no, only complete boxes 27L, 27N, 27P)

Calculate tax on taxable income in Box 27H - See the guide for further details.

27K ▶ \$

Overseas tax paid
27L ▶ \$

Subtract Box 27L from Box 27K. Print your answer in Box 27M.
27M ▶ \$

Imputation credits
27N ▶ \$

Subtract Box 27N from Box 27M. Print your answer in Box 27O. If 27N is greater than 27M print 0.00 in Box 27O.
27O ▶ \$

RWT and other tax credits (exclude any amounts shown in Boxes 27L and 27N)
27P ▶ \$

Subtract Box 27P from Box 27O. Print your answer in Box 27Q - if the result is negative, put a minus sign in the last box.
27Q ▶ \$

Calculate tax on Box 27J at 45 cents in the dollar
27R ▶ \$

