

- Please answer questions to the best of your ability. Estimates are required if accurate information is not available.
- Give full answers to the questions below. Continue on a separate page if necessary.

This is your disclosure of financial position as at

Day	Month	Year					

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

Your date of birth

Day	Month	Year	

Your full name

Your home address (please do not use a PO Box number)

Street address

Suburb Town or city

Your phone numbers

Work Home Mobile

Your email address

Spouse/partner's name

Spouse/partner's IRD number

Number of dependants living with you Age(s) of children

Your occupation or job

Your employer's name

Your employer's address

Things you need to know

Please complete and send this form to us as soon as possible. You may start making payments on your account while we consider your application. Go to www.ird.govt.nz/makepayment for payment options.

Student loan debt

- **Restriction on future borrowing** – Borrowers with an overdue student loan repayment obligation of \$500 or more for 12 months or longer, will not be able to borrow through the Student Loan Scheme. This applies to all student loan applications received on or after 7 February 2013 and includes amounts under an instalment arrangement.
- **Late payment interest** – (formerly late payment penalty) is calculated monthly and will appear on your student loan account. For instalment arrangements you'll be charged reduced late payment interest for each month you make the required payments.

Tax debt

- **Late payment penalties (where applicable)** – these will be suppressed from the time we receive this application and during the term of the arrangement, providing we accept your request and you make the required payments. For more information go to www.ird.govt.nz (search keywords: managing penalties)
- **Interest** – this continues to accrue on your account during the term of the arrangement. You will have to pay the interest. Please note, you can reduce the amount of interest you will have to pay by making larger and/or earlier payments when you can. For current interest rates go to www.ird.govt.nz (keywords: credit and debit rates).

Inland Revenue's website

Visit our website at www.ird.govt.nz for detailed information about tax and social policy, access to our booklets, returns, forms, newsletters, public rulings and a variety of interactive online services.

We regularly add new services to our site. You can register to get updates about these by selecting "What's new" on the homepage.

Proposal for payment Give details of how you propose paying your debt

Amount you can pay now	Instalment amount	How often payments will be made	Payment start date
\$ <input type="text" value=""/> . <input type="text" value=""/>	\$ <input type="text" value=""/> . <input type="text" value=""/>	weekly (wk)/fortnightly (fn)/monthly (mn)	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> Day Month Year

How will payments be made?

By automatic payment from your bank account
 By credit or debit card online
 By internet banking

When we receive your application we'll contact you to confirm the arrangement or request more information.

1. Why didn't you pay your tax by the due date? If this was due to you having insufficient funds explain what contributed to this.

2. Have you attempted to obtain a loan to pay this debt? No Go to Question 3
 Yes Provide details below

3. How do you plan to pay future tax liabilities?

4. Trusts

Are you now, or have you in the past 5 years been, involved with a trust? No Go to Question 5
 Yes Provide details below of all trusts that you are, or have been, involved with in the past 5 years

	Trust 1	Trust 2
Name of trust	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
IRD number of trust	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Your involvement in the trust (select all that apply)	Trustee / Settlor / Beneficiary	Trustee / Settlor / Beneficiary
List any money or other assets you transferred to the trust in the last 5 years	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Give date of transfer	<input style="width: 100%;" type="text"/> Day Month Year	<input style="width: 100%;" type="text"/> Day Month Year
Estimated value at time of transfer	\$ <input style="width: 100%;" type="text"/>	\$ <input style="width: 100%;" type="text"/>
Detail assets of the trust	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Estimated current value of the trust's assets	\$ <input style="width: 100%;" type="text"/>	\$ <input style="width: 100%;" type="text"/>
Do you owe the trust any money? If "Yes", please state amount	\$ <input style="width: 100%;" type="text"/>	\$ <input style="width: 100%;" type="text"/>
Does the trust owe you money? If "Yes", please state amount	\$ <input style="width: 100%;" type="text"/>	\$ <input style="width: 100%;" type="text"/>
Please list the names and contact details of the trustees	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

5. Other entities Provide details below of any other entities (eg, companies, partnerships) you're involved in

Name	<input type="text"/>	IRD number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name	<input type="text"/>	IRD number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name	<input type="text"/>	IRD number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6. Income (after tax) Enter all household income.

Source	You		Your spouse or partner	
	Amount	Frequency	Amount	Frequency
Salary or wages from regular job	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Working for Families Tax Credits	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Work and Income benefit	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Payments from ACC	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Temporary, casual or part-time work	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Self-employed income/drawings	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Superannuation	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Child support or maintenance received	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Rent/board received	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Interest or dividends	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Overseas income in NZ dollars	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Payments from income protection insurance	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Commission not taxed at source	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Other income	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn	\$ <input type="text"/> . <input type="text"/>	wk/fn/mn
Please provide details	<input type="text"/>		<input type="text"/>	

7. Residential and/or commercial property

Do you or your spouse or partner own any residential or commercial property? No Go to Question 8
 Yes Provide details below

	Property 1	Property 2
Property address	<input type="text"/>	<input type="text"/>
Date of purchase	<input type="text"/> Day Month Year	<input type="text"/> Day Month Year
Purchase price	\$ <input type="text"/> . <input type="text"/>	\$ <input type="text"/> . <input type="text"/>
Estimated current value	\$ <input type="text"/> . <input type="text"/>	\$ <input type="text"/> . <input type="text"/>
Name of mortgage provider	<input type="text"/>	<input type="text"/>
Term of mortgage	Years <input type="text"/>	Years <input type="text"/>
Date mortgage taken out	<input type="text"/> Day Month Year	<input type="text"/> Day Month Year
Original amount of mortgage	\$ <input type="text"/> . <input type="text"/>	\$ <input type="text"/> . <input type="text"/>
Current balance	\$ <input type="text"/> . <input type="text"/>	\$ <input type="text"/> . <input type="text"/>
Repayment amount	\$ <input type="text"/> . <input type="text"/> wk/fn/mn	\$ <input type="text"/> . <input type="text"/> wk/fn/mn
Annual council rates	\$ <input type="text"/> . <input type="text"/>	\$ <input type="text"/> . <input type="text"/>

8. Household and personal effects

Do you or your spouse or partner own any household or personal effects with a market value greater than \$5,000, eg, jewellery, art work, antiques, electronics

No Go to Question 9
 Yes Provide details below

Items	Estimated market value
	\$.

9. Vehicles

Do you or your spouse or partner own a vehicle, eg, a car, boat, caravan, motorcycle, jet ski, hobby vehicle

No Go to Question 10
 Yes Provide details below

Vehicle details	Vehicle 1	Vehicle 2	Vehicle 3	Vehicle 4
Owner				
Year and make				
Model				
Registration number				
Purchase date	Day Month Year	Day Month Year	Day Month Year	Day Month Year
Estimated current value	\$.	\$.	\$.	\$.
Amount currently owing	\$.	\$.	\$.	\$.
Date of loan	Day Month Year	Day Month Year	Day Month Year	Day Month Year
Repayment amount	\$. wk/fn/mn	\$. wk/fn/mn	\$. wk/fn/mn	\$. wk/fn/mn

10. Credit and store cards

Provider	Minimum monthly payment	Credit limit	Balance
	\$.	\$.	\$.
	\$.	\$.	\$.
	\$.	\$.	\$.

11. Bank accounts

Provide all financial details relating to any bank accounts including term deposits, building society and credit union accounts

Account name	Bank and branch	Account number	Balance	Overdraft limit
			\$.	\$.
			\$.	\$.
			\$.	\$.
			\$.	\$.

12. Life insurance/superannuation policies, bonus bonds and KiwiSaver

Do you or your spouse or partner have any life insurance or superannuation policies or KiwiSaver accounts?

No Go to Question 13
 Yes Provide details below

Company	Premium/contribution	Surrender value
	\$. wk/fn/mn	\$.
	\$. wk/fn/mn	\$.
	\$. wk/fn/mn	\$.

13. Money owed to you

Does anyone owe you or your spouse or partner money?

No Go to Question 14
 Yes Provide details below

Owed to you by	Amount
	\$.
	\$.

14. Other assets

Do you or your spouse or partner have any other assets not mentioned so far?

No Go to Question 15

Yes Provide details below

Give details, including the value of any shares/debentures, other assets or funds held not specified elsewhere

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15. Child support, maintenance, childcare and/or school fees

Do you or your spouse or partner pay child support or maintenance, childcare and/or school fees?

No Go to Question 16

Yes Provide details below

	Amount	Frequency
Child support/maintenance	\$ <input style="width: 60px;" type="text" value="."/>	wk/fn/mn
Childcare/school fees	\$ <input style="width: 60px;" type="text" value="."/>	wk/fn/mn

16. Hire purchases (other than vehicles)

Item	Date purchased	Repayment amount	Balance to pay
	<input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <small>Day Month Year</small>	\$ <input style="width: 60px;" type="text" value="."/> wk/fn/mn	\$ <input style="width: 60px;" type="text" value="."/>
	<input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <small>Day Month Year</small>	\$ <input style="width: 60px;" type="text" value="."/> wk/fn/mn	\$ <input style="width: 60px;" type="text" value="."/>

17. Loans

Do you or your spouse or partner have any other loans, other than a student loan, not declared elsewhere on this form?

No Go to Question 18

Yes Provide details below of all personal and business loans

	Loan 1	Loan 2
Lender		
Start date	<input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <small>Day Month Year</small>	<input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> / <input style="width: 20px;" type="text"/> <small>Day Month Year</small>
Term	<input style="width: 30px;" type="text"/> Months	<input style="width: 30px;" type="text"/> Months
Amount borrowed	\$ <input style="width: 60px;" type="text" value="."/>	\$ <input style="width: 60px;" type="text" value="."/>
Current balance	\$ <input style="width: 60px;" type="text" value="."/>	\$ <input style="width: 60px;" type="text" value="."/>
Repayment amount	\$ <input style="width: 60px;" type="text" value="."/> wk/fn/mn	\$ <input style="width: 60px;" type="text" value="."/> wk/fn/mn
Security—give details		

18. Debts owed by you not declared elsewhere on this form

Do you or your spouse or partner owe any money that has not been declared elsewhere on this form, eg, Department for Courts, Department of Work and Income, utilities etc.

No Go to Question 19

Yes Provide details below of all other money owed by you.

Owed to	Balance outstanding	Minimum repayment amount
	\$ <input style="width: 60px;" type="text" value="."/>	\$ <input style="width: 60px;" type="text" value="."/> wk/fn/mn
	\$ <input style="width: 60px;" type="text" value="."/>	\$ <input style="width: 60px;" type="text" value="."/> wk/fn/mn
	\$ <input style="width: 60px;" type="text" value="."/>	\$ <input style="width: 60px;" type="text" value="."/> wk/fn/mn

19. Are you involved in any business activity or do you receive any income that isn't taxed at source?

No Go to Number 20

Yes Complete the questions over the page

Business taxpayers – provide details relating to all your business activities

EITHER – Attach copies of:

- most recent financial statements, and
- all bank and credit card statements for the last 3 months

OR – complete the following:

Total business income (eg, sales, schedular payments, rental) Average monthly (based on 12 months to date) \$

Business expenses Average monthly (based on 12 months to date)

List only those expenses which are business related. Do not include the personal portion of the expenses, eg, mobile phone, insurance and transport costs

Accident compensation premiums/levies \$

Advertising \$

Bad debts \$

Communication \$

Depreciation \$

Entertainment \$

Insurance \$

Interest \$

Legal and accounting \$

Motor vehicle \$

Power \$

Rent, lease and rates \$

Repairs and maintenance \$

Salary and wages \$

Travel and accommodation \$

Other expenses (please specify) \$

Provision for ongoing tax liabilities \$

List all business assets (eg, machinery) Book value

<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>

List all business debts (eg, overdraft, money owed to suppliers)

<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>

20.

- When requested, you will be required to supply evidence of your financial position.
- We may ask you to provide more information in relation to this application. If you give incorrect information, any decisions resulting from the information provided may be reversed.

Declaration

I declare that the information provided in this statement is accurate and complete

Signature

/ /
Date

Please send this completed form to:

Inland Revenue
PO Box 39090
Wellington Mail Centre
Lower Hutt 5045

Privacy

Meeting your tax obligations means giving us accurate information so we can assess your liabilities or your entitlements under the Acts we administer. For full details of our privacy policy go to www.ird.govt.nz (keyword: privacy).