

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**? Don't include any payments from Inland Revenue. See page 11 in the guide.

No Go to Question 11A Yes Enter the amount from your summary of earnings below.

Total family tax credit from Work and Income

11 ▶ \$, , , .

11A Did you receive **income with tax deducted**, as shown on your summary of earnings? See page 11 in the guide.

No Go to Question 12 Yes Copy the amounts from your summary of earnings 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 page 13 in the guide for a list of income not liable for ACC earners' levy (eg, NZ Super, income-tested benefits, student allowances).

12 Did you receive income from **schedular payments**, as shown on your summary of earnings? See page 14 in the guide.

No Go to Question 13 Yes Copy the schedular payment totals from your summary of earnings to Boxes 12A and 12B below. Enter any expenses related to schedular payments in Box 12C (**don't include at Box 26**)

Total tax deducted

12A ▶ \$, , .

Total gross payments

12B ▶ \$, , .

Expenses related to schedular payments (**don't include expenses claimed here at Box 26**)

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 page 15 in the guide.

Total RWT

13A ▶ \$, , .

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

Total gross interest

13B ▶ \$, , .

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 page 17 in the guide.

Total dividend imputation credits

14 ▶ \$, , .

Total dividend RWT and payments for foreign dividends

14A ▶ \$, , .

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

Total gross dividends

14B ▶ \$, , .

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 page 18 in the guide.

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 at Questions 13, 14 or 15, as appropriate.

No Go to Question 17 Yes Print the totals here. See page 18 in the guide.

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**? Staple proof of overseas tax paid and a letter detailing any overseas losses to the top of page 3.

No Go to Question 18 Yes Print the totals here. See page 19 in the guide.

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, please read page 20 in 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 or 24 as appropriate.

No Go to Question 19 Yes Print the totals here. See page 25 in the guide.

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 and 24.

No Go to Question 20 Yes Print the totals here. See page 25 in the guide.

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 **Tax credit and income subtotal**

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

Tax credit subtotal

20A \$, , .

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

Income subtotal

20B \$, , .

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

No Go to Question 22 Yes Print the totals here. See page 26 in the guide.

Total shareholder-employee salary

21 \$, , .

If you **did not receive** a shareholder-employee salary but may in the future, please tick Box 21A.

21A

If you qualify for WfFTC, and you are a major shareholder working full-time without pay for your close company which earns gross income, please read page 26 in the guide and tick this box if it applies to you.

21B

22 Did you receive any **rents**?

No Go to Question 23 Yes Print the totals here. See page 27 in the guide.

Net rents

22 \$, , .

23 Did you receive income from **self-employment**? Don't include any income from your summary of earnings here.

No Go to Question 24 Yes Print the totals here. See page 27 in the guide.

Self-employed net income

23 \$, , .

24 Did you receive any **other income**?

No Go to Question 25 Yes Print the totals here. See page 29 in the guide.

Please put name of payer above, and type of income below

Total other net income

24 \$, , .

37 Is this return for a part-year?

37 No Go to Question 38 Yes See page 48 in the guide. If "Yes", tick the situation below that applies to you.

- 37A You arrived in (or returned to) New Zealand and you're now a tax resident
- You left New Zealand permanently (for more than 325 days)
- You're a student loan borrower and you've left New Zealand for 184 days or more
- You were declared bankrupt
- This return is for a deceased person to the date of their death
- Your balance date changed during the year.

Print the start and end dates the return is for in the spaces provided.

37B From to 37C

Day Month Year Day Month Year

Notice of assessment and declaration

38 Please see page 48 in the guide, then read and sign the following:

The information in this return is true and correct and represents my assessment for the year ended 31 March 2015 as required under the Tax Administration Act 1994. It is also a correct statement of my earnings for the purposes of the Accident Compensation Act 2001.

Signature

/ /

Date

Please make a copy of this return for your own records.

There are penalties for not filing a tax return or for filing a false return. See page 7 in the guide.

39 What to do next

- Attach your summary of earnings and/or Working for Families Tax Credits form to your return if you've made any changes on them.
- Print your name and IRD number on all other papers attached to your return.
- Send us your return on or by 7 July 2015, unless you have an extension of time or a non-standard balance date.
- Send your completed return in the envelope supplied, or to the address shown below. Keep a copy for your records.
- If you have tax to pay, you need to pay it by 7 February 2016 to avoid any penalties (if you have a tax agent, see page 49 in the guide). You can pay earlier if you want to. If you want to pay now, staple your cheque to the front page of this return.

Privacy

To find out what may happen to the information you provide on this form, see page 58 in the guide.

Accident Compensation Act 2001

See page 55 in the guide to understand how the information you provide on this form will be used for ACC purposes.

Send this form to:

Inland Revenue
 PO Box 39090
 Wellington Mail Centre
 Lower Hutt 5045

OFFICE USE ONLY

40 Operator code Corresp indicator Payment attached Return cat All Yes No Scanner

March 2015