

Estate or trust beneficiary details

2024

Income Tax Act 2007	202 1
Use this form for the 2024 tax year only. See the guide for further deta	
Complete this form and attach it to the top of page 3 of the IR6 estate The combined totals of Boxes 27I must equal Box 21A 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	Beneficiary's date of birth or
beneficiary's full flame	commencement date
Beneficiary's full address	Day Month Year
Street address or PO Box number	
Suburb, box lobby or RD	Town or city
Beneficiary's jurisdiction	
of tax residency	
Jurisdiction does not issue tax identification numbers (TINs)	Beneficiary's IRD number
jurisdiction does not issue tax identification numbers (Tins)	27B
TIN not required in Jurisdiction	Beneficiary's TIN
	27C)
Beneficiary income:	Calculate tax on Box 27K at 45 cents in the dollar
Interest	275 \$
\$, , , , , , , , , , , , , , , , , , ,	Total tax payable on beneficiary's income. Add Boxes 27R and 27S.
Dividends	If the result is negative, put a minus sign in the last box
27E \$, , , , , , , , , , , , , , , , , ,	27T \$, , ,
Māori authority distributions	Beneficiary account movements
27F \$, , , ,	There has been a distribution to this beneficiary but it has been valued
Overseas income	at nil Opening balance
27G \$, , , ,	If the amount is negative, put a minus sign in the last box
Other income	27U \$
27H \$, , , ,	Accounting income and other distributions
Taxable income (sum of Boxes 27D to 27H)	27V \$
271 \$, , , ,	Corpus
Estate or trust paying tax on beneficiary's income Yes (if no, only complete boxes 27K, 27M, 27O,	27W \$
27J No 27Q, 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA, 27AB &	Capital
27AC) Taxable distribution by non-complying trust	27X \$
27K \$	Use of trust property for less than market value
Tax on taxable income	27Y \$
27L \$	Distribution of trust assets
Overseas tax paid	27Z \$
27M \$	Forgiveness of debt
Subtract Box 27M from 27L. Print your answer in Box 27N	27AA \$
27N \$	Amounts withdrawn from the trust during the year
Imputation credits	If the amount is negative, put a minus in the last box (Negative amount indicates repayments made to previous withdrawals –
270 \$	this is to be added to the closing balance)
Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P	27AB \$, , , , , , , , , , , , , , , , , ,
27P \$	Closing balance. Add boxes 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA and then
RWT and other tax credits (exclude any amounts shown in box 27M and 27O)	subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. If the result is negative, put a minus sign in the last box
27Q \$	27AC \$
Subtract Box 27Q from Box 27P. Print your answer in Box 27R -	· , , , , , , , , , , , , , , , , , , ,
if the result is negative, put a minus in the last box	

Beneficiary's full address Sinest saddress or PO Box number	Beneficiary's full name	Beneficiary's date of birth or commencement date
Substitutes to PD Box number 27A	Beneficiary's full address	
Beneficiary's jurisdiction of tax residency 27A		
Beneficiary's jurisdiction does not issue tax identification numbers (TINs) TIN not required in Jurisdiction Beneficiary's IRD number 276 Beneficiary income: Interest 277 Solution to Box 27K at 45 cents in the dollar 278 Total cax payable on beneficiary's income. Add Boxes 27R and 27S. If the result is negative, put a minus sign in the last box 277 The payable on beneficiary's income. Add Boxes 27R and 27S. If the result is negative, put a minus sign in the last box 277 The payable content is negative, put a minus sign in the last box 270 271 Solution on Box 27R 27X	Street address or PO Box number	
Seneficiary's IRD number TIN not required in Jurisdiction	Suburb, box lobby or RD	Town or city
Beneficiary income Interest: 270		
Total tax payable on beneficiary's income. Add Boxes 27R and 27S. If the result is negative, put a minus sign in the last box	Jurisdiction does not issue tax identification numbers (TINs)	Beneficiary's TIN
Overseas income 7G \$ Other income 27H \$ Taxable income (sum of Boxes 27D to 27H) 27I \$ Estate or trust paying tax on beneficiary's income Yes (fino, only complete boxes 27K, 27M, 27O, 27U, 27V, 27V, 27V, 27V, 27X, 27X, 27A, 27AB & 27AC) Taxable distribution by non-complying trust 27K \$ Tax on taxable income 27L \$ Overseas tax paid 27N \$ Soutract Box 27M from 27L Print your answer in Box 27N 27N \$ Imputation credits Subtract Box 27N print 0.00 in Box 27P 27P \$ RWT and other tax credits (exclude any amounts shown in box 27M and 27O) 27AC \$ Soutract Box 27Q from Box 27P. Print your answer in Box 27R if the result is negative, put a minus sign in the last box Capital 27X \$ Accounting income and other distributions 27W \$ Accounting income and other distributions 27W \$ Capital 27X \$ Use of trust property for less than market value 27Y \$ Soutract Box 27M from 27L Print your answer in Box 27N Amounts withdrawn from the trust during the year if the amount is negative, put a minus in the last box (Negative amount indicates repayments made to previous withdrawals—this is to be added to the closing balance) 27AB if amounts were withdrawn, Print your answer in box 27AC. If the result is negative, put a minus sign in the last box 27AC \$ Closing balance. Add boxes 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA and then subtract 27AB if amounts were withdrawn, Print your answer in box 27AC. If the result is negative, put a minus sign in the last box 27AC \$ Closing balance. Add boxes 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA and then subtract 27AB if amounts were withdrawn, Print your answer in box 27AC. If the result is negative, put a minus sign in the last box 27AC \$ 27AC \$	27D \$ Dividends 27E \$	Total tax payable on beneficiary's income. Add Boxes 27R and 27S. If the result is negative, put a minus sign in the last box
Overseas income 27C \$ Cher income 27H \$ Cher income 27U \$ Copping balance if the amount is negative, put a minus sign in the last box Accounting income and other distributions 27U \$ Accounting income and other distributions 27V \$ Accounting income and other distributions 27V \$ Corpus 27I \$ Corpus 27I \$ Corpus 27AC Taxable distribution by non-complying trust 27K \$ Tax able distribution by non-complying trust 27K \$ Tax not naxable income 27V \$ Distribution of trust assets 27V \$ Subtract Box 27M from 27L. Print your answer in Box 27N 27N \$ Imputation credits Amounts withdrawn from the trust during the year fit he amount is negative, put a minus in the last box Negative amount indicates repayments made to previous withdrawals—this is to be added to the closing balance) 27N \$ Closing balance 27V \$ Corpus 27V \$ Copital 27V \$ Distribution of trust assets 27Z \$ Copital 27V \$ C		· ·
Other income 27t \$ Accounting income and other distributions Taxable income (sum of Boxes 27D to 27H) 271 \$ Corpus Estate or trust paying tax on beneficiary's income Yes (if no, only complete boxes 27K, 27M, 27O, 27U, 27V, 27V, 27X, 27Y, 27Z, 27AA, 27AB & 27AC) Taxable distribution by non-complying trust 27k \$ Use of trust property for less than market value 27l \$ Overseas tax paid 27l \$ Distribution of trust assets Overseas tax paid 27l \$ Forgiveness of debt 27l \$ Amounts withdrawn from the trust during the year if the amount is negative, put a minus sign in the last box (Negative amount is negative, put a minus sign in the last box (Accounting income and other distributions 27v \$ \$ Corpus 27w \$ \$ Use of trust property for less than market value 27v \$ \$ Distribution of trust assets 27v \$ \$ Forgiveness of debt 27AA \$ \$ Forgiveness of debt 27AA \$ \$ Subtract Box 27M from 27L Print your answer in Box 27N 27NA \$ Amounts withdrawn from the trust during the year if the amount is negative, put a minus in the last box (Negative amount indicates repayments made to previous withdrawals—this is to be added to the closing balance) 27AB \$ \$ Closing balance. Add boxes 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. If the result is negative, put a minus sign in the last box (1ft he result is negative, put a minus sign in the last box 27V \$ \$ Accounting income and other distributions 27W \$ \$ Accounting income and other distributions		
State or trust paying tax on beneficiary's income Yes (if no, only complete boxes 27X, 27M, 27O, 27Q, 27U, 27V, 27V, 27X, 27X, 27X, 27X, 27X, 27X, 27X, 27X	27G) \$	
Taxable income (sum of Boxes 27D to 27H) 27I \$ Estate or trust paying tax on beneficiary's income Yes (fi no, only complete boxes 27K, 27M, 27O, 27J) No 27Q, 27U, 27V, 27X, 27Y, 27Z, 27AA, 27AB & 27AC) Taxable distribution by non-complying trust 27K \$ Tax on taxable income 27L \$ Overseas tax paid 27M \$ Overseas tax paid 27M \$ Subtract Box 27M from 27L. Print your answer in Box 27N 27N \$ Imputation credits Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P 27AC \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27N. Print your answer in Box 27N and 27O) \$ Corpus 27W \$ Capital 27X \$ Use of trust property for less than market value 27Y \$ Distribution of trust assets 27Z \$ Forgiveness of debt 27AA \$ Amounts withdrawn from the trust during the year If the amount is negative, put a minus in the last box (Negative amount indicates repayments made to previous withdrawals – this is to be added to the closing balance) 27AB \$ Closing balance. Add boxes 27U, 27V, 27V, 27Y, 27Z, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. If the result is negative, put a minus in the last box 27AC \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R - if the result is negative, put a minus in the last box		
Estate or trust paying tax on beneficiary's income Yes (if no, only complete boxes 27K, 27M, 27O, 27J No 27Q, 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA, 27AB & 27AC) Taxable distribution by non-complying trust 27K \$ Tax on taxable income 27L \$ Overseas tax paid 27M \$ Overseas tax paid 27M \$ Subtract Box 27M from 27L. Print your answer in Box 27N Imputation credits 27O \$ Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P 27D \$ Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P 27D \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P. If 27O is greater tha		Accounting income and other distributions
Estate or trust paying tax on beneficiary's income Yes (if no, only complete boxes 27K, 27M, 27O) 27J No 27Q, 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA, 27AB & 27AC) Taxable distribution by non-complying trust 27K \$ Use of trust property for less than market value 27Y \$ Use of trust assets Overseas tax paid 27Z \$ Distribution of trust assets Overseas tax paid 27Z \$ Subtract Box 27M from 27L. Print your answer in Box 27N 27N \$ Imputation credits Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P 27P \$ Closing balance. Add boxes 27U, 27V, 27X, 27Y, 27Z, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. If the result is negative, put a minus sign in the last box Closing balance. Add boxes 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. If the result is negative, put a minus sign in the last box 27AC \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R if the result is negative, put a minus sign in the last box 27AC \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R if the result is negative, put a minus sign in the last box		27V \$, , , , .
Yes (if no, only complete boxes 27K, 27M, 27O, 27U, 27V, 27V, 27V, 27V, 27Y, 27Z, 27AA, 27AB & 27AC) Taxable distribution by non-complying trust 27K \$ Tax on taxable income 27V \$ Distribution of trust assets Overseas tax paid 27N \$ Subtract Box 27M from 27L. Print your answer in Box 27N 27N \$ Imputation credits Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P. If 27O \$ Subtract Box 27Q from Box 27N. Print your answer in box 27M and 27O) 27O \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R. Subtract Box 27Q from Box 27Q from Box 27P. Print your answ		
Taxable distribution by non-complying trust 27K \$ Tax on taxable income 27Y \$ Distribution of trust assets 27Z \$ Overseas tax paid 27M \$ Subtract Box 27M from 27L. Print your answer in Box 27N 27NN \$ Imputation credits 27O \$ Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P 27B \$ Closing balance. Add boxes 27U, 27V, 27V, 27V, 27Z, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. 17AB \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R if the result is negative, put a minus in the last box 27AC \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R if the result is negative, put a minus sign in the last box	Yes (if no, only complete boxes 27K, 27M, 27O, 27Q, 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA, 27AB &	Capital
Tax on taxable income 27Y \$ Distribution of trust assets 27Z \$ Overseas tax paid 27M \$ Subtract Box 27M from 27L. Print your answer in Box 27N 27N \$ Imputation credits 27O \$ Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P 27P \$ Closing balance. Add boxes 27U, 27V, 27W, 27X, 27X, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. If the result is negative, put a minus in the last box Closing balance. Add boxes 27U, 27V, 27W, 27X, 27X, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. If the result is negative, put a minus sign in the last box 27AC \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R - if the result is negative, put a minus in the last box		
Distribution of trust assets Overseas tax paid 27M) \$ Subtract Box 27M from 27L. Print your answer in Box 27N 27N \$ Imputation credits 27O) \$ Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P 27P \$ RWT and other tax credits (exclude any amounts shown in box 27M and 27O) 27Q \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P 27AB Subtract Box 27Q from Box 27P. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P. Subtract Box 27Q from Box 27P. Print your answer in Box 27M and 27O) 27AB Subtract Box 27Q from Box 27P. Print your answer in Box 27M and 27O) 27AC \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R - if the result is negative, put a minus in the last box	27K \$	
Subtract Box 27M from 27L. Print your answer in Box 27N 27N \$ Imputation credits Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P 27P \$ RWT and other tax credits (exclude any amounts shown in box 27M and 27O) Subtract Box 27Q from Box 27P. Print your answer in Box 27R if the result is negative, put a minus in the last box Closing balance. Add boxes 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. If the result is negative, put a minus in the last box 27AC \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R if the result is negative, put a minus in the last box		, , , , , , , , , , , , , , , , , , ,
Subtract Box 27M from 27L. Print your answer in Box 27N \$ Amounts withdrawn from the trust during the year If the amount is negative, put a minus in the last box (Negative amount indicates repayments made to previous withdrawals – this is to be added to the closing balance) \$ Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P \$ Closing balance. Add boxes 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. If the result is negative, put a minus sign in the last box 27AC \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R if the result is negative, put a minus in the last box	, , , ,	27Z \$
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\$ (Negative amount indicates repayments made to previous withdrawais – this is to be added to the closing balance) Subtract Box 27O from Box 27N. Print your answer in Box 27P. If 27O is greater than 27N print 0.00 in Box 27P 27P \$ Closing balance. Add boxes 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. RWT and other tax credits (exclude any amounts shown in box 27M and 27O) \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R - if the result is negative, put a minus in the last box	, , ,	If the amount is negative, put a minus in the last box
If 27O is greater than 27N print 0.00 in Box 27P 27P \$ Closing balance. Add boxes 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. If the result is negative, put a minus sign in the last box 27Q \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R - if the result is negative, put a minus in the last box		
Closing balance. Add boxes 27U, 27V, 27W, 27X, 27Y, 27Z, 27AA and then subtract 27AB if amounts were withdrawn. Print your answer in box 27AC. RWT and other tax credits (exclude any amounts shown in box 27M and 27O) \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R - if the result is negative, put a minus in the last box		27AB \$, , , , , , , , , , , , , , , , , ,
27Q \$ Subtract Box 27Q from Box 27P. Print your answer in Box 27R - if the result is negative, put a minus in the last box	27P \$, , , , , , , , , , , , , , , , , ,	subtract 27AB if amounts were withdrawn. Print your answer in box 27AC.
Subtract Box 27Q from Box 27P. Print your answer in Box 27R - if the result is negative, put a minus in the last box		
	Subtract Box 27Q from Box 27P. Print your answer in Box 27R - if the result is negative, put a minus in the last box	, , , , , , , , , , , , , , , , , , ,
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