



1 April 2013 to 31 March 2014

To help with the processing of your special tax code, please ensure you have answered all the questions relevant to you and sign this form. We'll send this application back if any information is missing.

1. Your IRD number

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

2. Your name or the name of the partnership, trust or company (do not show a trade name).

☐ Mr ☐ Mrs ☐ Miss ☐ Ms

3. Your postal address

Street address or PO Box number

Suburb, box lobby or RD

4. Your contact phone number

5. Your NZ Super number from Work and Income, if applicable

6. Please give the reason why you're applying for a special tax code. If you have losses to carry forward, please detail them here.

7. Tick one option to show which income you want your special tax code to apply to. You can only choose one source of income.

☐ NZ Super ☐ Employment (print the name of your employer below).

8. In the boxes below estimate all the income you will receive before tax, between 1 April 2013 and 31 March 2014.

Gross salary and wages. Show your employer's name and the amount you'll earn. Include taxable benefits or weekly ACC payments here. If you have more than three employers, use a separate sheet of paper and attach it to this form.

Employer's name

\$

Are you employed for the full year?

☐ Yes ☐ No

If not full year enter dates: Start

Stop

Tax code

Employer's name

\$

Are you employed for the full year?

☐ Yes ☐ No

If not full year enter dates: Start

Stop

Tax code

Employer's name

\$

Are you employed for the full year?

☐ Yes ☐ No

If not full year enter dates: Start

Stop

Tax code

Gross annual NZ Super (don't include any overseas social security pensions such as the UK National Retirement Pension)

Show the type of NZ Super you are receiving

☐ Single (living alone)

☐ Single (sharing)

☐ Married

Are you receiving for the full year?

☐ Yes ☐ No

If not full year enter dates: Start

Stop

Gross overseas social security pensions or benefits

\$

Are you receiving for the full year?

☐ Yes ☐ No

If not full year enter dates: Start

Stop

Gross overseas private pensions

\$

Are you receiving for the full year?

☐ Yes ☐ No

If not full year enter dates: Start

Stop

Schedular payments (eg commission to real estate and insurance agents).

Expenses \$. \$.

Gross interest

Show the tax rate that will be deducted from the interest

☐

10.5%

☐

17.5%

☐

30%

☐

33%

\$.

Gross dividends

\$.

Provisional tax payments. If you're going to make any 2014 provisional tax payments show the amount here.

\$.

Note: Call us (see notes at the bottom of the page) if you have been charged provisional tax but you're applying for a special tax code instead. You may need to re-estimate your provisional tax liability.

Other income or losses from rents, partnerships, self-employment, estates, overseas, or interest or dividends with no tax deducted at source.

Note: If this is your first special tax code application and you haven't filed tax returns including losses from these sources, you'll need to provide documents showing how you calculated the amount you're claiming for.

Type of income

\$.

Estimate the amount of tax, if any, which **will be deducted** from this **other** income.

\$.

Lump sum payments, such as ACC or redundancy.

\$.

9. Working for Families Tax Credits. Are you or your partner entitled to Working for Families Tax Credits from Ministry of Social Development or Inland Revenue (or an overseas equivalent)?

☐

Yes

☐

No

Declaration

I declare that the information on this form is true and correct.

Signature

Date

Notes

- If your income changes at any time during the year, or you start or stop being eligible for Working for Families Tax Credits, you may need to get a new special tax code. Please call us on 0800 377 774 (if you are in business) or 0800 227 774 (all other customers).
- This rate is based on your estimates and may not be the final amount you owe. Final tax can only be worked out on the actual figures shown when you receive your 2014 personal tax summary or file your *Individual tax return (IR 3)*.
- Send the completed form to us at the following postal address:
Inland Revenue
PO Box 39010
Wellington Mail Centre
Lower Hutt 5045

Student loan changes

You can no longer use a special tax code to change the amount of your student loan repayment deductions. If you want to change the amount of your repayments you can:

- make extra payments direct to Inland Revenue or ask your employer to make extra voluntary deductions.
- reduce your repayment deductions on any secondary earnings. If you earn under the pay period threshold, eg, \$367 a week from your main earnings, you can apply for a special deduction rate.
- get an exemption from student loan repayment deductions. If you're a New Zealand-based borrower studying full-time and earn under \$19,084 in the year, you can apply for a repayment deduction exemption.

Go to www.ird.govt.nz/studentloans for more information about these changes, options to make extra payments and to apply for a special deduction rate or a repayment deduction exemption.



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