

Low-interest loans

June quarter

1 Employee's name	2 Year loan was granted	3 Is rate reviewable?		4 Rate of interest %	5 Prescribed or non-concessionary rate %	6 Interest at prescribed or non-concessionary rate	7 Actual interest charged	8 Taxable value (6 minus 7)	9 Loan balance at end of period
		Yes	No						
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.

Total taxable value for first quarter **1** \$.

September quarter

		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.

Total taxable value for second quarter **2** \$.

December quarter

		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.

Total taxable value for third quarter **3** \$.

March quarter

		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.
		<input type="radio"/>	<input type="radio"/>			\$.	\$.	\$.	\$.

Total taxable value for fourth quarter **4** \$.

Add Boxes 1 to 4. Print your answer in Box C. Copy this amount to Box C on page 1. **C** \$.

Contributions to funds, insurance and superannuation schemes

- Complete this panel if you make contributions for your employees to:

Category 1 – any sick, accident and death fund approved by Inland Revenue

Category 2 – any life insurance, pension insurance, personal accident or sickness insurance policy, or insurance fund of a friendly society

Category 3 – any superannuation scheme where ESCT (employer superannuation contribution tax)* does not apply

Attributed benefits

The need to attribute benefits only applies if you have elected to use the alternate rate calculation process. Attribute benefits to the individual employee who receives the benefit for each of the three categories above, if the **annual** taxable value, within each category, of all contributions for that employee is \$1,000 or more.

1	2	3
Employee's name or "non-attributed" —if non-attributed benefits	Name and description of fund	Taxable value
Category 1:		\$.
		\$.
		\$.
		\$.
		\$.
Category 2:		\$.
		\$.
		\$.
		\$.
		\$.
Category 3:		\$.
		\$.
		\$.
		\$.
		\$.
Category 4:		\$.
		\$.
		\$.
		\$.
		\$.

Total taxable value. Copy this amount to Box D on page 1

D \$.

*Formerly specified superannuation contributions withholding tax (SSCWT)