

NZ Tax Calendar 2026-2027

The Complete IRD Business Tax Planning Guide for New Zealand

FREE Download



Stay ahead of GST, PAYE, Provisional Tax, Income Tax and IRD compliance with this practical guide designed for New Zealand business owners.

Inside this guide:

- ✓ Annual Tax Calendar
- ✓ GST Filing Checklist
- ✓ PAYE Compliance Checklist
- ✓ Provisional Tax Planner
- ✓ Record Keeping Guide
- ✓ Business Expense Checklist
- ✓ Tax Planning Worksheet
- ✓ Common Tax Mistakes to Avoid

Prepared by **DFK Orb360**

Welcome

Running a business is challenging enough without worrying about missing important tax deadlines.

This guide has been created by the Chartered Accountants at **DFK Orb360** to help New Zealand businesses stay organised, compliant and financially confident throughout the year.

Inside, you'll find practical checklists, planning tools and reminders that make managing your tax obligations much easier.

Whether you're a:

- Sole Trader
- Company
- Contractor
- Property Investor
- Partnership
- Trust

this guide will help you stay one step ahead of Inland Revenue requirements.

Annual NZ Tax Calendar

Month	Key Business Tasks
April	Review previous financial year
May	Prepare GST Return
June	Tax Planning Review
July	GST Filing
August	Review Provisional Tax
September	Cashflow Review
October	Payroll & PAYE Review
November	GST Preparation
December	Year-End Tax Planning
January	Review Financial Records
February	Tax Planning Meeting
March	End of Financial Year Preparation

Pro Tip

Add these dates to your Outlook or Google Calendar with reminders one week before each due date.

Monthly Business Accounting Checklist

Complete these tasks every month.

- ☐ Reconcile bank accounts
- ☐ Record all income
- ☐ Record all expenses

- ☐ Upload receipts
- ☐ Check unpaid invoices
- ☐ Review cash flow
- ☐ Update payroll
- ☐ Reconcile GST
- ☐ Review Xero
- ☐ Backup financial records
- ☐ Check tax savings
- ☐ Schedule accountant review

GST Filing Checklist

Before submitting your GST Return

- ☐ Bank accounts reconciled
- ☐ Sales entered correctly
- ☐ Business expenses entered
- ☐ Tax invoices collected
- ☐ GST report reviewed
- ☐ Outstanding invoices checked
- ☐ Supplier invoices entered
- ☐ Large purchases verified
- ☐ GST return reviewed
- ☐ Return submitted before due date

Common GST Mistakes

- ✗ Claiming GST without a valid tax invoice
- ✗ Missing business expenses
- ✗ Incorrect GST coding

✗ Forgetting imported services

✗ Late filing

PAYE & Payroll Checklist

For businesses with employees

- ☐ Payroll processed
- ☐ Employee hours verified
- ☐ PAYE calculated
- ☐ KiwiSaver contributions checked
- ☐ Leave balances updated
- ☐ Payroll reports generated
- ☐ Payday filing completed
- ☐ Employee records updated
- ☐ Payroll reconciled
- ☐ PAYE payment scheduled

Provisional Tax Planner

Use this worksheet to prepare for future tax payments.

Estimated Annual Revenue

Estimated Business Expenses

Estimated Profit

Expected Tax Liability

Next Provisional Tax Payment

Amount to Set Aside Monthly

Tip

Setting aside money every month for provisional tax can help avoid cash-flow pressure when payments are due.

Business Expense Checklist

Review these deductible expenses regularly.

Office

- ☐ Rent
- ☐ Internet
- ☐ Phone
- ☐ Electricity
- ☐ Office Supplies

Marketing

- ☐ Google Ads
- ☐ Facebook Ads
- ☐ Website Hosting
- ☐ SEO
- ☐ Graphic Design

Software

- ☐ Xero
- ☐ Microsoft 365
- ☐ Adobe
- ☐ CRM
- ☐ Cloud Storage

Vehicle

- ☐ Fuel
- ☐ Repairs
- ☐ Registration
- ☐ Insurance

☐ Logbook

Professional Services

☐ Accountant

☐ Lawyer

☐ Consultant

☐ Insurance Broker

Record Keeping Checklist

Good records make tax time much easier.

Keep copies of:

✓ Sales invoices

✓ Purchase invoices

✓ Receipts

✓ Payroll records

✓ Bank statements

✓ Loan agreements

✓ Asset purchases

✓ Vehicle logbooks

✓ Insurance documents

✓ GST reports

✓ Financial statements

How Long Should Records Be Kept?

Keep business records for the period required by Inland Revenue under New Zealand law. Check the latest IRD guidance for current record-retention requirements.

10 Common Tax Mistakes Businesses Make

1. Waiting until the last minute
2. Missing GST deadlines

3. Forgetting provisional tax
4. Poor bookkeeping
5. Losing receipts
6. Mixing business and personal expenses
7. Not reconciling bank accounts
8. Ignoring cash flow
9. Not reviewing financial reports
10. Trying to do everything alone

Remember

Tax planning isn't just about compliance.

It's about making better business decisions.

Need Professional Tax Advice?

Whether you need help with:

- ✓ GST Returns
- ✓ PAYE
- ✓ Payroll
- ✓ Provisional Tax
- ✓ Annual Tax Returns
- ✓ Xero Accounting
- ✓ Business Advisory
- ✓ IRD Compliance

our experienced Chartered Accountants are here to help.

Book Your FREE Consultation

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