

2017 Working for Families Checklist

CLIENT NAME: _____

Please check the list below to ensure you have provided all the applicable information – remember the onus is on you to provide complete and accurate information.

Incomplete information may cause processing delays and an increase in cost

Spouse's Name		Spouse's IRD Number	
Child's Name	Child's DOB	Child's IRD Number	Shared Custody – Y / N and if so, how many days?

There have been changes to the types of income that the IRD are taking into account in respect of Working for Families entitlements Please see page two for the additional information required – **this page needs to be completed and signed before we can process your Working for Families return.**

Please note that the Working for Families calculation does not form part of our taxation service, we include it for indicative purposes only and our calculations are subject to confirmation from the IRD.

More information regarding adjustments can be found at
www.ird.govt.nz/wff-tax-credits/

Please note that the questions below apply to **both** parents.

Y / N

Total \$ Received

Checklist of Records Required

Child Support or Maintenance Payments Received

Trustee Income – are you the Settlor of a Trust that has made a profit in 2017 that has not been allocated to the beneficiaries of the Trust?

Salary exchanged for private use of an employer-provided motor vehicle

Employer-provided short-term charge facilities which allows you to buy, hire or charge goods or services without it being part of your wages or salary.

Fringe Benefits – do you have the use of a Company Vehicle? Did you receive an interest free or low interest loan from the Company?

Portfolio Investment Income (PIE) – except if it is a Superannuation Fund or Retirement Savings Scheme like Kiwisaver

Passive Income of Children – do any of your children earn greater than \$500 each from interest, dividends, rents, beneficiary income and/or PIE?

Income of a Non Resident Spouse – is your spouse a non resident who is earning money overseas?

Tax Exempt Salary/Wages/Pensions – do you or your spouse earn any salaries, wages or pensions that aren't taxed?

Pensions & Annuities – this includes 50% of the amount of pension or annuity payments from life insurance policies or a Superannuation Fund (excluding NZ Superannuation)

Other Payments - do you receive any other payments that are used for the family's day to day living expenses? If the total is more than \$5,000 per annum then we need to include it in the family income. Examples include - Grandparents providing an allowance, someone helping pay your monthly bills or a soft loan- interest free with no repayment date

Income Equalisation Scheme Deposits – please contact us if you are involved in the Agricultural, Fishing or Forestry business as this may apply to you.

	Y / N	Total \$ Received
Child Support or Maintenance Payments Received		
Trustee Income – are you the Settlor of a Trust that has made a profit in 2017 that has not been allocated to the beneficiaries of the Trust?		
Salary exchanged for private use of an employer-provided motor vehicle		
Employer-provided short-term charge facilities which allows you to buy, hire or charge goods or services without it being part of your wages or salary.		
Fringe Benefits – do you have the use of a Company Vehicle? Did you receive an interest free or low interest loan from the Company?		
Portfolio Investment Income (PIE) – except if it is a Superannuation Fund or Retirement Savings Scheme like Kiwisaver		
Passive Income of Children – do any of your children earn greater than \$500 each from interest, dividends, rents, beneficiary income and/or PIE?		
Income of a Non Resident Spouse – is your spouse a non resident who is earning money overseas?		
Tax Exempt Salary/Wages/Pensions – do you or your spouse earn any salaries, wages or pensions that aren't taxed?		
Pensions & Annuities – this includes 50% of the amount of pension or annuity payments from life insurance policies or a Superannuation Fund (excluding NZ Superannuation)		
Other Payments - do you receive any other payments that are used for the family's day to day living expenses? If the total is more than \$5,000 per annum then we need to include it in the family income. Examples include - Grandparents providing an allowance, someone helping pay your monthly bills or a soft loan- interest free with no repayment date		
Income Equalisation Scheme Deposits – please contact us if you are involved in the Agricultural, Fishing or Forestry business as this may apply to you.		

I declare that the above information is complete and correct

Partner 1

Partner 2

Date