



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

Spouses Name

Spouses IRD Number

Childs Name	Child's DOB	Child's IRD Number	Shared Custody Y / N and if so, how many days?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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 complete the checklist on the next page to ensure you have provided all the applicable information.

Without the signed and completed checklist we cannot schedule your work.



Checklist of Records Required

Please note that the questions below apply to both parents.

	Y/N	Total \$ Received
Child Support or Maintenance Payments Received	<input type="text"/>	<input type="text"/>
Trustee Income – are you the Settlor of a Trust that has made a profit in 2019 that has not been allocated to the beneficiaries of the Trust?	<input type="text"/>	<input type="text"/>
Salary exchanged – for private use of an employer-provided motor vehicle	<input type="text"/>	<input type="text"/>
Employer-provided short-term charge facilities – 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.	<input type="text"/>	<input type="text"/>
Fringe Benefits – do you have the use of a Company Vehicle? Did you receive an interest free or low interest loan from the Company?	<input type="text"/>	<input type="text"/>
Portfolio Investment Income (PIE) – except if it is a Superannuation Fund or Retirement Savings Scheme like Kiwisaver	<input type="text"/>	<input type="text"/>
Passive Income of Children – do any of your children earn greater than \$500 each from interest, dividends, rents, beneficiary income and/or PIE?	<input type="text"/>	<input type="text"/>
Income of a Non Resident Spouse – is your spouse a non resident who is earning money overseas?	<input type="text"/>	<input type="text"/>
Tax Exempt Salary/Wages/Pensions – do you or your spouse earn any salaries, wages or pensions that aren't taxed?	<input type="text"/>	<input type="text"/>
Pensions & Annuities – this includes 50% of the amount of pension or annuity payments from life insurance policies or a Superannuation Fund (excluding NZ Superannuation)	<input type="text"/>	<input type="text"/>
Other Payments – 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	<input type="text"/>	<input type="text"/>
Income Equalisation Scheme Deposits – please contact us if you are involved in the Agricultural, Fishing or Forestry business as this may apply to you.	<input type="text"/>	<input type="text"/>

I declare that the above information is complete and correct

Parent 1

Parent 2

Date