

Income and assets form



MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

Tell us about yourself

Write your client number here if you know it. This number can be found on your Community Services Card if you have one.

Client number

 | |

Tell us about yourself

1

What is your full name?

First and middle names

Surname or family name

2

What date were you born?

Day Month Year

3

Where do you live?

Flat/House number Street name

Suburb

Town/City

4

Is your mailing address different from where you live?

No

Yes



Tell us your mailing address

HOW TO ANSWER Q5:

Please only give us contact details you'd like us to use.

5

How else can we contact you?

Tick the best way for us to first contact you

Home phone	()	
Mobile phone	()	
Other phone	()	
Email		

Tell us about your income and assets

Tell us about income in the last 52 weeks?

6

Did you or your partner get income from any of the following sources in the last 52 weeks?

- Wages or salary No Yes
- Termination pay No Yes
- Redundancy pay No Yes
- Accident compensation (eg ACC) No Yes
- Income insurance (replacement/protection) No Yes Jointly with partner
- Farm or business income No Yes Jointly with partner
- Payments from self employment or contract work No Yes Jointly with partner
- Interest from savings, investments, or bonds No Yes Jointly with partner
- Dividends from shares, unit trusts, or managed funds No Yes Jointly with partner
- Income from rents No Yes Jointly with partner
- Payments from boarders or flatmates No Yes Jointly with partner
- Child Support payments No Yes
- Other income for a child No Yes
- Maintenance payments No Yes
- Payments from a former partner No Yes
- Student Allowance, scholarship, or Student Loan living cost payments No Yes
- Overseas pension, benefit or allowance payments No Yes
- Other superannuation or retirement scheme income (government or private) No Yes
- Income from an estate, if you've inherited money No Yes Jointly with partner
- Income from trusts No Yes Jointly with partner
- Other No Yes Jointly with partner

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Did you answer 'Yes' or 'Jointly with partner' to any of the sources of income listed in question 6?

No Yes

↓ Tell us the total before-tax amounts, for the last 52 weeks

Where did the income come from?	Payment made to?		
	You	Your partner	Jointly with partner
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

ATTACHMENT FOR Q6:
Bring a copy of your business accounts.

INFORMATION FOR Q6:
In this application form, 'partner' means the person you're married to or in a civil union or relationship with, not a business partner.

ATTACHMENT FOR Q7:
You need to show us proof of income you've received in the last 52 weeks.

HOW TO ANSWER Q8:
Other types of payment include advantages such as free or subsidised goods and services (for example, free food, subsidised accommodation).

8

Did you or your partner get other types of payment apart from money in the last 52 weeks?

No Yes

↓ Please tell us about the type of payment and its value

Type of payment	Where did it come from?	Its value
		\$
		\$
		\$
		\$
		\$

HOW TO ANSWER Q9:
The types of income you need to include here are listed on page 2.

9

Do you or your partner expect to get income or other payments in the next 52 weeks?

No Yes

↓ Please write the details below. Tell us the before-tax amounts

Where will the payment come from?	Payment made to?			How often do you expect the payment, such as weekly, fortnightly, monthly, one-off?
	You	Your partner	Jointly with partner	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	

Tell us about your assets

ATTACHMENT FOR Q10:
You may be asked to provide proof of your assets and their value.

10

Do you or your partner have any of the following cash assets?

- Money in bank or other savings No Yes
- Bonds, shares, debentures or stocks No Yes
- Money lent to other people or organisations No Yes
- Other cash assets No Yes

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If you answered 'yes' to any of the assets listed in question 10, please write the details below.

Type of asset	You	Your partner	Jointly owned
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

HOW TO ANSWER Q12:

Examples of property you don't live in include, land, holiday homes, bach/crib, investment properties.

12

Do you or your partner have any of the following non-cash assets?

- Property you don't live in No Yes
- Boat, caravan or motorhome No Yes
- Other No Yes

ATTACHMENT FOR Q13:

You may be asked to provide proof of these details.

13

If you answered 'yes' to any of the non-cash assets listed in question 12, please write the details below.

Type of asset	How much is it worth?	How much do you owe on it?
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$

Are you involved in a trust?

14

Are you or your partner involved in a trust, or have you ever been involved in a trust?

ATTACHMENT FOR Q14:

You'll need to show us trust documents; such as the trust deed, deed of debt, gift statements, accounts.

'Involved' means one or more of the following:

- you've set up a trust, usually by making a gift of assets or property
- you've transferred assets to a trust
- you make decisions about managing a trust
- you benefit from a trust, for example, by receiving income such as trust distributions.

No Yes

Name of trust

Text input field for the name of the trust.

Signature

The information I have given you is true and complete.

Applicant's name (print)

Text input field for applicant's name (print).

Applicant's signature

Text input field for applicant's signature.

Day Month Year

Three small text input fields for day, month, and year.

Applicant's partner's name (print)

Text input field for applicant's partner's name (print).

Applicant's partner's signature

Text input field for applicant's partner's signature.

Day Month Year

Three small text input fields for day, month, and year.