

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

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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

② 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	<input type="checkbox"/> No	<input type="checkbox"/> Yes	
Termination pay	<input type="checkbox"/> No	<input type="checkbox"/> Yes	
Redundancy pay	<input type="checkbox"/> No	<input type="checkbox"/> Yes	
Accident compensation (eg ACC)	<input type="checkbox"/> No	<input type="checkbox"/> Yes	
Income insurance (replacement/protection)	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> Jointly with partner
Farm or business income	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> Jointly with partner
Payments from self employment or contract work	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> Jointly with partner
Interest from savings, investments, or bonds	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> Jointly with partner
Dividends from shares, unit trusts, or managed funds	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> Jointly with partner
Income from rents	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> Jointly with partner
Payments from boarders or flatmates	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> Jointly with partner
Child Support payments	<input type="checkbox"/> No	<input type="checkbox"/> Yes	
Other income for a child	<input type="checkbox"/> No	<input type="checkbox"/> Yes	
Maintenance payments	<input type="checkbox"/> No	<input type="checkbox"/> Yes	
Payments from a former partner	<input type="checkbox"/> No	<input type="checkbox"/> Yes	
Student Allowance, scholarship, or Student Loan living cost payments	<input type="checkbox"/> No	<input type="checkbox"/> Yes	
Overseas pension, benefit or allowance payments	<input type="checkbox"/> No	<input type="checkbox"/> Yes	
Other superannuation or retirement scheme income (government or private)	<input type="checkbox"/> No	<input type="checkbox"/> Yes	
Income from an estate, if you've inherited money	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> Jointly with partner
Income from trusts	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> Jointly with partner
Other	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> 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
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

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

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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.

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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

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

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

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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.

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ATTACHMENT FOR Q13:

You may be asked to provide proof of these details.

13

Are you 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.

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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

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

'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

Please write the name of the trust

Name of trust

Signature

The information I have given you is true and complete.

Applicant's name (print)

Applicant's signature

Date

Day

Month

Year

Applicant's partner's name (print)

Applicant's partner's signature

Date

Day

Month

Year