

Transfer to Veteran's Pension



MINISTRY OF SOCIAL
DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

If you already get NZ Super or a benefit from Work and Income and are turning 65 shortly, you can complete this form to transfer to Veteran's Pension.

The Veteran's Pension is available as an alternative to New Zealand Superannuation (NZ Super) to:

- Veterans who have qualifying operational service confirmed by Veterans' Affairs, and who meet the NZ Super age and residency criteria; or
- Partners of veterans who qualify for a Veteran's Pension; or
- Surviving spouses of deceased veterans who would have qualified for a Veteran's Pension had they still been alive.

We'll send you a combined Community Services Card and SuperGold Card when you get Veteran's Pension. It gives you access to thousands of discounts and concessions from businesses around New Zealand and Australia, and to New Zealand government and/or local council services.

For more information or if you want help with this form go to workandincome.govt.nz or call us on **0800 650 656**.

Write your client number here. It can be found on your Community Services or SuperGold Card.

Client number

 | |

Tell us your details

1

What is your full name?

First and middle names

Surname or family name

2

What date were you born?

Day Month Year

3

How can we contact you?

Tick the best way for us to contact you

Home phone	()	<input type="checkbox"/>
Mobile phone	()	<input type="checkbox"/>
Other phone	()	<input type="checkbox"/>

4

Do you agree to get emails from us, including information about discounts and concessions for SuperGold Card holders?

No Yes I don't have an email address

5

Are you currently getting NZ Super?

No Yes

HOW TO ANSWER Q3:
Please only give us contact details you would like us to use.

INFORMATION FOR Q6:

ACC is the Accident Compensation Corporation.

INFORMATION FOR Q7:

If you don't give us a tax code, your payment will be taxed at the higher 'no-notification rate' of 45%

ATTACHMENT FOR Q7:

If you use tax code 'STC' please provide proof from Inland Revenue.

HOW TO ANSWER Q20:

Please answer this question even if you were born in New Zealand.

Your answers to questions 20 and 21 tell us if you meet the residence criteria.

ATTACHMENT FOR Q20:

If you're using your residence since turning 50 in the Cook Islands, Niue and/or Tokelau to qualify for Veteran's Pension, you need to provide proof of the time you've lived in those countries. Ask us if you need help with this.

HOW TO ANSWER Q9:

Your answers to questions 8 and 9 tell us if you meet the residence criteria.

6

Are you currently getting weekly compensation payments from ACC?

No Yes

If you get weekly compensation payments through ACC, in most cases you can't get Veteran's Pension for the same period. You may be able to get Veteran's Pension if ACC have confirmed:

- you can get both payments for a period of time, or
- the date your ACC payment stopped.

If you need help call ACC on **0800 101 996**.

7

What tax code do you want to use for your Veteran's Pension payments?

You can work out your tax code using the online calculator at ird.govt.nz or phone Inland Revenue on **0800 227 774**.

8

How many years, from the age of 50, have you lived in any of the following countries?

New Zealand Cook Islands Niue Tokelau
 None **If your answers in these boxes add up to 10 years or more go to question 10**

9

How many years have you lived in New Zealand between the ages of 20 and 50 years old?

Tell us about your household

10

Do you live alone?

I live with my partner **Go to question 15**
 I live with other people **Go to question 11**
 Yes **Go to question 12**

INFORMATION FOR Q11:

We do not need to know the name of each person.

ATTACHMENT FOR Q11:

If you need to include more than two people in your application, please write these details about each one on a separate sheet of paper, and send it with this application form.

11

Please provide details for anyone you live with:

Person 1

Relationship to you

Is this person 18 years or younger?

No **Go to next person or question 14**

Yes **↓ Answer the following**

What is their date of birth?
Day Month Year

Does this person attend school or a tertiary institution? No Yes

Person 2

Relationship to you

Is this person 18 years or younger?

No **Go to question 14**

Yes **↓ Answer the following**

What is their date of birth?

Day Month Year

Does this person attend school or a tertiary institution? No Yes

12 Do you have any visitors aged 18 years or older who will be staying with you for 13 weeks or longer?

No Yes

13 What is your accommodation?

- House or flat A room in a boarding house
- Self-contained 'granny' flat Hotel or motel
- Self-contained unit in a retirement village or rest home
- A boat moored within New Zealand territorial waters
- Accommodation in a caravan park
- Other **↓ Please provide details below**

INFORMATION FOR Q13:
'Self-contained' means there is a kitchen or kitchenette and a bathroom.

Tell us if you have a partner

14 Do you have a partner?

No **Go to question 19** Yes

INFORMATION FOR Q14:
By partner we mean someone you're in a relationship with.

15 What is your partner's name?

16 What date was your partner born?

Day Month Year

17 Do you want your partner to transfer to Veteran's Pension?

No Yes

INFORMATION FOR Q17:
If your partner is included in your NZ Super or benefit already, you have the option to include them in your Veteran's Pension, or your partner can receive their own separate pension or benefit. Please talk with us if you're unsure.

18 Does your partner agree to being included in your Veteran's Pension?

No Yes **→ Your partner must sign this application before this can happen**

Armed forces service 19

Are you applying for Veteran's Pension because of your own service?

No **→ What is your partner's service number?**

Go to question 26

Yes

20

HOW TO ANSWER Q20:
If you do not know the percentage we can find this out for you.

INFORMATION FOR Q20:
Disablement Pension was previously known as 'War Disablement Pension'.

Do you receive a Disablement Pension from Veterans' Affairs?

No

Yes %

Don't know **We'll get this information from Veterans' Affairs for you.**

21

What country's forces did you serve with?

Country	Name of unit
<input type="text"/>	<input type="text"/>

22

What is your service number?

23

What were the dates of your service?

Date service commenced			Date discharged		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Day	Month	Year	Day	Month	Year

24

Did you serve overseas?

No **Go to question 26**

Yes **→ Please tell us the length of your service** Months Years

25

What were the theatres of operation and approximate dates?

26

Do you want to continue to get extra help with the Veteran's Pension?

If you don't already get extra financial or other help such as Accommodation Supplement, Disability Allowance or Temporary Additional Support, please talk with us about applying.

No

Go to your obligations

Yes

27

Have your income and assets changed since you last told us?

No

Yes



What you need to do (your obligations)



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When you're getting payments from us, there are some things you need to do to make sure you're getting paid the right amount. So does your partner, if you have one.

If you don't do these things, we could pay you the wrong amount. It could also mean we have to reduce or stop your payments. We don't want you to miss out on money you need so please read these carefully.



Let us know when things change

You need to let us know about changes that might affect the amount you're paid.

Changes to information about you or your family, like:

- name, address, contact details or bank account number
- starting or stopping living alone
- starting or ending a relationship, marriage, or civil union
- your partner passes away
- the number of dependent children you support.

We also need to know if you:

- go into or come out of hospital
- are being held in custody or on remand.

If we have the wrong information we could pay you the wrong amount. If we pay you too much you might have to pay us back.



We can't pay you while you're out of New Zealand unless we've agreed to it.

Tell us if you're going overseas

If you're traveling or moving overseas you may need to let us know because we may have to change or stop your payments. Whether you need to let us know will depend on your travel plans. There are some examples below.

If there's a good reason you can't tell us before you go, then you need to let us know as soon as you can.

To let us know your travel plans, you can complete a form on our website. Go to workandincome.govt.nz and search on *Overseas travel dates*.

When you get other payments from us

If you get other payments from us like Winter Energy Payment, Disability Allowance, Accommodation Supplement or Temporary Additional Support, you can keep getting them only for the first 28 days you're away. You need to let us know about your travel plans before you go.

Traveling for short trips of 28 days (four weeks) or more

You need to let us know if:

- you're going to be away more than 28 days, or
- you don't know how long you'll be away for, or
- you intend to have more than one overseas trip in the next 12 months.

Traveling for 26 weeks or less

You can travel to any country for 26 weeks or less and keep getting your payments as usual.

If you're still overseas after 26 weeks your payment may stop. If you're still over there after 30 weeks you may have to repay all your payments since you left.

If you get held up because of circumstances beyond your control that you couldn't have known about before you left, you may be able to keep payments made in the first 26 weeks.

Traveling for more than 26 weeks

If you have no intention of living in the countries you're planning to visit, you may be able to get all or some of your Veteran's Pension while you're away. At least six weeks before you go, you need to contact us to apply to get your payments overseas. What you'll get depends on where you go and how long you've lived in New Zealand.

Going overseas to live

You can live almost anywhere in the world and still get all or some of your Veteran's Pension. What you'll get depends on where you go and how long you've lived in New Zealand. Generally you must apply for payment overseas about 4-6 weeks before you leave New Zealand. To arrange a meeting, call our International Services team on **0800 777 227**.

What can happen if you don't meet your obligations

Your payments can stop if you don't tell us something we need to know.



You can find full details about what can happen if you don't meet your obligations at msd.govt.nz/not-meeting-your-obligations

You need to do the things listed above to keep getting payments from us. So does your partner, if you have one.

If you don't tell us something we need to know, your payments can stop. In some cases you could even be prosecuted.

Your rights

You have the right to ask us to review any decision we make about your payments.



If you don't think we have things right or there's something you don't understand:

- call us – we can usually fix it over the phone
- you have the right to ask us to review the decision. Find out how at msd.govt.nz/reviews

Privacy Statement

The Ministry of Social Development includes Work and Income, MSD Housing Assessment, Senior Services, StudyLink and other service lines. The legislation administered by the Ministry of Social Development allows us to check the information that you give us. This may happen when you apply for assistance and at any time after that. The Privacy Act 1993 requires us to tell you why we collect the information and what we will do with it.

Why we collect information

The information you give us is collected under the authority of the legislation administered by the Ministry of Social Development and will be held by the Ministry of Social Development.

The information is collected for the purposes of the legislation administered by the Ministry of Social Development including:

- granting benefits and other assistance under the Social Security Act 2018
- delivering superannuation services under the New Zealand Superannuation and Retirement Income Act 2001
- delivering assistance under the Veteran's Support Act 2014
- statistical and research purposes
- providing advice to Government
- providing support and services for you and your family
- providing education related services
- care and protection needs of children
- assessing eligibility for social housing and calculating income-related rents under the Housing Restructuring and Tenancy Matters Act 1992
- assessing whether you and/or your partner may be entitled to an overseas pension, benefit or allowance.

You are not required to give the Ministry of Social Development information, but if you do not give us all the information we ask for, your application for benefits or pensions and other assistance may be declined.

We may contact health practitioners

The Ministry of Social Development may contact health practitioners to check any health related information you give us.

We may use information for public housing

Information you give us when you apply for assistance, and at any time after that, may also be used for public housing purposes under the Housing Restructuring and Tenancy Matters Act 1992, including reviewing your eligibility for social housing or your income-related rent. Public housing is subsidised housing available to people in the greatest need of housing for the duration of their need. It is provided by Housing New Zealand and approved community housing providers.

We may compare the information you give us with information held by other agencies

The information you give us may be compared with information held by other agencies such as Inland Revenue, the Ministry of Justice, Department of Corrections, New Zealand Customs Service, Department of Internal Affairs, Accident Compensation Corporation, Housing New Zealand Corporation, Ministry of Health and Immigration New Zealand. It may also be compared with social security information (for example, pension or benefit information) held by other governments (including Australia, Malta and the Netherlands).

We may share information with Inland Revenue

Under the Tax Administration Act 1994, if you have dependent children, the information you give us may be shared with Inland Revenue for the purpose of administering Working for Families Tax Credits. Inland Revenue may also:

- use the information for the purposes of child support, student loans and taxation
- disclose it to the Ministry of Business, Innovation, and Employment, Statistics New Zealand, the Ministry of Justice, the Accident Compensation Corporation, and the Ministry of Education
- disclose your personal information to your partner.

We may give information to service providers, employers, public housing providers and childcare providers

The Ministry of Social Development may:

- give employers information about you if you use our employment services
- share information with childcare centres to administer your entitlement to childcare assistance
- give information about you to the Tertiary Education Commission, Workbridge, training providers, career services or other agencies that have a formal agreement to provide services on behalf of the Ministry of Social Development, if you use our employment services
- share information about you with public housing providers (such as Housing New Zealand) to administer your housing-related assistance.

We may use your information to give you a better service

Other information that you give us that is not required to assess your entitlement to a New Zealand Superannuation may be used to provide a better service to you.

You have the right to see and correct your information

Under the Privacy Act 1993 you have the right to ask to see all information we hold about you and to ask us to correct that information.

Signature page

Office copy

Applicant

I have answered all the questions that apply to me and my situation.

The information I have given you is true and complete.

I understand the things I need to do while I'm getting payments.

I will do what I need to do to meet my obligations.

I understand what you do with my personal information and how you protect my privacy.

Applicant's name (print)

Applicant's signature

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
Day	Month	Year

Applicant's partner

I have answered all the questions that apply to me and my situation.

The information I have given you is true and complete.

I understand the things I need to do while I'm getting payments.

I will do what I need to do to meet my obligations.

I understand what you do with my personal information and how you protect my privacy.

Applicant's partner's name (print)

Applicant's partner's signature

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
Day	Month	Year

Helper's statement

Complete this if you've helped the applicant or their partner to complete this application form.

Your first and middle names

Your surname or family name

Your address

Your phone number

Tick the box for the statement that applies

- I completed this application form at the request of the person applying. They told me they understood what they were signing. The statements and answers I have completed are true and complete as given to me by the person applying.
- I completed this application form at the request of the partner of the person applying. They told me they understood what they were signing. The statements and answers I have completed are true and complete as given to me by the partner of the person applying.

Helper's signature

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
Day	Month	Year