

# New Zealand Superannuation Application



**Work and Income**  
Te Hiranga Tangata

A service of the Ministry of Social Development

If you need help with this form call us on ☎ **0800 552 002**.

## Please read this before you start

**Before you start please make sure that you have read all the information at the front of this form. If you need help, please contact us.**

**You can apply for your New Zealand Superannuation online instead of completing this form. You can do this by visiting [www.seniors.msd.govt.nz](http://www.seniors.msd.govt.nz).**

## How you qualify

**You may be able to get New Zealand Superannuation if you:**

- are aged 65 or over, **and**
- are a New Zealand citizen or permanent resident, **and**
- have been resident and present in New Zealand for at least 10 years since you turned 20 years of age, including five years since you turned 50, **and**
- normally live in New Zealand at the time you apply.

There are exceptions to some of these residency requirements.

If you are not sure if you meet these criteria, you can visit our website [www.seniors.msd.govt.nz](http://www.seniors.msd.govt.nz) or you can call us on ☎ **0800 552 002**.

## When you should apply

The date you apply is important because it affects when your payments start. It is important that you apply 2–3 weeks before you turn 65 to avoid missing payments.

**If you apply after you turn 65 your payments will only start from the date you apply.**

## What you need to provide

**So we can process your New Zealand Superannuation application faster, please provide everything we need you to. If there is anything on the list below that you can't get, or if you are not sure about what to provide, contact us. Documents that you provide must be originals and not photocopies.**

When you apply you will need to provide:

- For New Zealand born clients, one form of government-issued documentation stating your full legal name and date of birth (eg your birth certificate, passport, driver licence, firearms licence, deed poll, etc)
- For clients born overseas, proof of your lawful residence in New Zealand (eg New Zealand passport, other country passport with residence class visa or residence permit, citizenship certificate, etc)
- Two more documents supporting your identity. These could include your marriage certificate, bank statement, phone or power account, driver licence, etc)

**Note: One of the documents requested above must be at least 2 years old.**

- Proof of any name change
- Proof of your bank account details (not required for your spouse/partner).

**If you have a spouse/partner you will also need to provide this information about them.**

## How to contact us

**You can:**

- visit our website at [www.seniors.msd.govt.nz](http://www.seniors.msd.govt.nz)
- phone us on ☎ **0800 552 002**
- email us at [seniors@msd.govt.nz](mailto:seniors@msd.govt.nz)
- free fax us on ☎ **0800 999 996**.

## If you have a spouse/partner

If you have a spouse/partner, we need to ask you about them as this will help us pay you the right rate.

If your spouse/partner does not qualify for New Zealand Superannuation in their own right, you may want to include them in your payments. In this situation, New Zealand Superannuation is income tested and you will need to provide proof of your and your spouse/partner's income.

Your spouse/partner will also need to complete a *New Zealand Superannuation Application – Spouse/Partner* form.

## How your financial situation may affect New Zealand Superannuation

If you are not having a spouse/partner included in your payments, New Zealand Superannuation is not income or asset tested. This means that you can earn other income or have assets and still receive New Zealand Superannuation payments.

Weekly ACC payments, or pension payments from overseas, may affect your New Zealand Superannuation payments.

Other income you earn can affect any **extra** financial help that you might get over and above New Zealand Superannuation. It might also affect the tax code you use for your New Zealand Superannuation payments.

If you apply to have a spouse/partner included in your New Zealand Superannuation (because they don't qualify in their own right), the amount of income you both earn could affect how much you get.

## SuperGold Card

A SuperGold Card will be sent to you automatically, once your New Zealand Superannuation is granted.

If you want to see what discounts are available when using your card then go to [www.supergold.govt.nz](http://www.supergold.govt.nz).

If you want to have a paper copy of the discounts available then please phone ☎ **0800 254 565**.

## Obligations

It is important to let us know about any changes that could affect your New Zealand Superannuation payments to ensure that we pay you correctly. You can let us know of any changes by phoning ☎ 0800 552 002.

**You must tell the Ministry of Social Development immediately if either you or your spouse/partner:**

- have changes to personal details (such as name, address or bank account number)
- have changes to your living situation (such as marriage or separation, entering or ending a civil union, starting or ending a de facto relationship with someone of the same or opposite sex, starting or stopping living alone)
- intend to travel or move overseas
- are admitted to or discharged from hospital
- have been granted or are eligible for an overseas pension or benefit
- are imprisoned/held in custody on remand
- have any other changes that may affect your New Zealand Superannuation entitlement or rate.

**If your spouse/partner is included in your New Zealand Superannuation then you must tell the Ministry of Social Development immediately if either of you:**

- have a change in your work situation (such as starting paid part-time, casual or full-time work)
- become self employed / start to run a business
- have changes to your income or financial circumstances.

## Important

**If you:**

- make a false statement, **or**
- fail to answer all the questions in this application in full, **or**
- if you do not tell the Ministry of Social Development about any changes in your life that might affect your entitlement or rate.

**then you understand that:**

- your New Zealand Superannuation may be reviewed and cancelled, **and**
- you or your spouse/partner may have to pay back the total amount of any overpayment, **and**
- the Ministry of Social Development may impose a penalty of up to three times the value of the overpayment, **or**
- you or your spouse/partner may be prosecuted and fined or imprisoned.

## Privacy Statement

**The legislation administered by the Ministry of Social Development allows us to check the information that you give us in this form.**

**This may happen when you apply for a benefit or pension, and at any time after that.**

**The Privacy Act 1993 requires us to tell you that:**

- The information you give us is collected under the authority of the legislation administered by the Ministry of Social Development.
- The information 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 Work and income, Child, Youth and Family and other service lines of the Ministry), and in particular for:
  - granting benefits/pensions and other assistance under the Social Security Act 1964 and the New Zealand Superannuation and Retirement Income Act 2001
  - statistical and research purposes
  - providing advice to Government
  - providing support and services for you and your family
  - providing education related services
  - providing employment related services
  - Care and protection needs of children.
- The Ministry of Social Development may contact health providers to verify any health related information you give us.
- The information you give us may be compared with information held by Inland Revenue, the Ministry of Justice, the Department of Corrections, the New Zealand Customs Service, the Department of Internal Affairs, the Accident Compensation Corporation, the 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 and the Netherlands).
- 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 Department of Labour, Statistics New Zealand, the Ministry of Justice, the Accident Compensation Corporation, and the Ministry of Education
  - disclose your personal information to your spouse/partner (if you have one).
- The Ministry of Social Development may give employers information about you if you use our employment services.
- The Ministry of Social Development may share information you have given us with childcare centres to administer your entitlement to childcare.
- You are not required to give us information, but if you do not give us all the information we ask for your application for benefit/pension may be declined.
- 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.

# New Zealand Superannuation Application



Work and Income  
Te Hiranga Tangata

A service of the Ministry of Social Development

CLIENT NUMBER  
(if known)

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## Before you start

Please check that you have read the instructions at the front of this form and that you have all the documents you need to provide as shown on page 1 of this form.

Please complete all questions.

If you need help with this form, call us on ☎ 0800 552 002.

## Name

1. What is your full name?

Mrs

Miss

Ms

Mr

Other ▶

Please note:

First name(s)

Surname or family name

2. What is your name on your birth certificate (if different from above)?

First name(s)

Surname or family name

**Q3 note:** Give any other names, not already stated above, you use now or have used in the past. These might include married names, English names, changes by deed poll, or aliases.

3. Are you or have you been known by any other name(s) including married names or aliases?

No

Yes ▶

Please provide details below:

1.
2.
3.
4.

4. Are you:

Male

Female

## Birth date

5. What is your date of birth?

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Day

Month

Year

## Address

**Q6 note:** If you live in a rural area, a house number could include:

- RAPID number
- fire number
- emergency services number.

**Q7 note:** Mailing address includes:

- postal box (PO Box)
- rural delivery details
- C/O address.

6. Where do you live?

Flat/house no.

Street name

Suburb

City

7. What is your mailing address (if different from above)?


## Contacting you

**Q9 note:** The SuperGold Card entitles you to discounts from participating businesses and gives easy access to concession on government and local authority services.

### 8. How else can we contact you?

Description	Details	Try first ✓
Home phone	( ) ( )	
Mobile phone	( ) ( )	
Work phone	( ) ( )	
Fax	( ) ( )	
Home email		
Work email		

### 9. Would you like to receive information by email from us, including details about discounts for SuperGold Card holders?

No  Yes ▶ This service is voluntary and you can withdraw from it at any time. We will never provide your details to an unauthorised third party.

## War/Veteran's pension entitlement

### 10. Have you served with the New Zealand Armed Forces?

No  Yes ▶ You may be entitled to:

- ▶ War Disablement, Surviving Spouse or Partner pension. For more information call ☎ **0800 4 VETERAN (0800 4 838 372)**, and/or
- ▶ Veteran's Pension. For more information call ☎ **0800 650 656**.

## Accident Compensation

**Q11 note:** If you receive weekly compensation payments through ACC, you can't receive New Zealand Superannuation, unless ACC have confirmed:

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

### 11. Are you currently receiving weekly compensation payments from ACC? (ACC is the Accident Compensation Corporation)

No  Yes ▶ If you need help, call ACC on ☎ **0800 101 996**.

## Bank details

**Q12 note:** You will need to provide proof of your bank account details.

### 12. What bank account do you want your New Zealand Superannuation paid into?

The account is in the name of:

The account number is:

Bank	Branch	Account number

## Tax details

**Q14 note:** If you use tax code STC, please provide verification from Inland Revenue.

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

### 13. What is your Inland Revenue tax number?

### 14. What tax code do you want to use for your New Zealand Superannuation payments?

Tax code ▶ You can work out your tax code using the online calculator at [www.ird.govt.nz](http://www.ird.govt.nz) or phone Inland Revenue on ☎ **800 227 774**.

## Ethnic group

**Q15 note:** You don't have to answer this question if you don't want to.

This information is for statistics and could be used for research and future development work.

### 15. Which ethnic group(s) do you identify with? (you can choose more than one)

- New Zealand Maori ▶ Which tribe(s)/iwi?
- New Zealand European  Niuean  Samoan  Indian
- Cook Island Maori  Tokelauan  Tongan  Chinese

# Residency

**Q16 note:** A permanent resident is someone who has a residence class visa or residence permit.

**Q19 note:** This means that you consider New Zealand to be your home, you are a legal resident and you normally live here.

**Q21 and 22 note:** You may be asked to provide verification to support this information.

## Periods you have lived or worked overseas

**Q23 note:** If you can't remember the exact day, we will accept the month and year.

This information is required to assess eligibility to any overseas pension or benefit.

For more information call us on **0800 777 227**.

### 16. What is your residency status? (tick one box)

New Zealand Citizen – born in New Zealand ▶ Go to Question 19

New Zealand Citizen – not born in New Zealand

Date of citizenship

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Day Month Year

Permanent resident

Date permanent residence granted

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Day Month Year

Other ▶ What is your residency status?

### 17. When did you arrive in New Zealand?

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Day Month Year

### 18. Where were you born?

Town/city

Country

### 19. Do you normally live in New Zealand?

No  Yes

### 20. Do you regularly visit any countries outside New Zealand?

No  Yes ▶ Please provide details below:

Name of country you visit or will visit	How often?	How long for?	Purpose (eg holiday, working, living, etc)

### 21. How many years have you lived in New Zealand from the age of 50 years?

▶ If 10 years or more, please go to Question 23

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


### 23. Have you lived or worked in any countries outside New Zealand?

No  Yes ▶ Please provide details below:

Name of country	Entry date	Exit date	Purpose (eg working, living etc)
	/ /	/ /	
	/ /	/ /	
	/ /	/ /	
	/ /	/ /	
	/ /	/ /	
	/ /	/ /	
	/ /	/ /	
	/ /	/ /	

## Overseas pensions and benefits

**Q24 note:** We need you to tell us this because your payments may be affected if you receive or are eligible to receive an overseas pension or benefit.

 Please attach any documents to your completed application form that confirm the payment(s), eg pension certificates.

If you receive more than two payments, please attach a separate sheet showing the details.

### 24. Are you receiving, or do you qualify for a pension from overseas?

- No ▶ Go to Question 27       Don't know ▶ Go to Question 27  
 Yes ▶ Please provide details below:

### 25. If 'Yes', what type(s) of pension are you receiving, or do you qualify for, from overseas?

- Retirement or old age       War service       Disability or invalidity  
 War widow       Widow or survivor       War restitution  
 Superannuation       War injury       Child or dependant  
 Other payments

### 26. Please provide details about the types of payment you are receiving:

(If you are not sure of any payment you may qualify for then leave this question blank)

Your payment details	Pension 1	Pension 2
Country the payment comes from:		
How much do you receive in each payment (in overseas currency)?		
Is this amount before or after tax?		
How often do you receive this payment (eg weekly, monthly, annually)?		
Overseas payment reference number:		
Name of your pension, benefit or allowance:		

## Spouse/partner

**Q27 note:** A spouse or partner can be your husband or wife, your civil union partner, or a person of the same or opposite sex with whom you have a de facto relationship.

### 27. Do you have a spouse/partner?

- No ▶ Go to Question 35  
 Yes ▶ Are you:       Married       In a Civil Union       In a relationship

**We need spouse/partner information even if they are not being included in your New Zealand Superannuation so that we can pay you the right rate.**

### 28. What is your spouse/partner's full name?

First name(s)       Surname or family name

### 29. What is your spouse/partner's date of birth?

/  /   
Day      Month      Year

### 30. Is your partner: Male      Female

### 31. Do you and your spouse/partner live at the same address?

- No       Yes ▶ Go to Question 33

### 32. Where does your spouse/partner live?

- Rest home       Public hospital       Private hospital  
 Other ▶

### 33. Do you want to include your spouse/partner in your New Zealand Superannuation?

- No       Yes ▶ They need to complete a New Zealand Superannuation Application – Spouse/Partner form

### 34. Is your spouse/partner receiving a current benefit or New Zealand Superannuation?

- No ▶ They need to complete and sign the spouse/partner's details section on page 10  
 Yes ▶ What is their client number?     |     |

**Q31 note:** If your spouse/partner is living at a different address, eg a rest home, you may qualify for the Living Alone Payment.

**Q33 note:** You may want to include your spouse/partner in your New Zealand Superannuation if they don't qualify for it themselves.

If you include your spouse/partner any other income could affect how much you and your partner get.

If you aren't sure what the best option is, please talk with us.

## Living situation

If you live alone you may qualify for the Living Alone Payment. It recognises the extra costs of maintaining a household on your own.

You may also get this payment when you have a spouse/partner who is in residential care, hospital or prison, or in some situations when you are not living on your own.

### 35. Do you live alone?

No  Yes ▶ Go to Question 37

**Q36 note:** We don't need to know the name of each person.

### 36. Please provide details for anyone you live with:

	Relationship to you	Date of birth	Does this person attend school or a tertiary institution?
1.		/ /	
2.		/ /	
3.		/ /	
4.		/ /	

**Q37 note:** A visitor is someone who does not normally live with you.

### 37. Do you have visitor(s) aged 18 years or older who will be staying with you for 13 weeks or longer?

No ▶ If you have a visitor(s) staying with you for less than 13 weeks in any 26 week period you may be eligible for the Living Alone Payment.  
 Yes

**Q38 note:** 'Self-contained' means there is a kitchen or kitchenette and a bathroom.

### 38. 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  Boat moored within New Zealand territorial waters  
 Accommodation in a caravan park  
 Other ▶ Please provide details below:


# Spouse's/partner's Residency Details



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SPOUSE/PARTNER'S CLIENT NUMBER  
(if known)

<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"/>
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## Before you start

Please ask your spouse/partner to complete ALL questions if they are:

- not already receiving New Zealand Superannuation
- not being included in your New Zealand Superannuation
- not already receiving a current benefit.

We need this information so that we can pay you the right rate.

## Name

1. What is your full name?

Mrs  Miss  Ms  Mr Other ▶

Please note:

First name(s)

Surname or family name

2. What is your name on your birth certificate (if different from above)?

First name(s)

Surname or family name

**Q3 note:** Give any other names, not already stated above, you use now or have used in the past. These might include married names, English names, changes by deed poll, or aliases.

3. Are you or have you been known by any other name(s) including married names or aliases?

No  Yes ▶ Please provide details below:

## Birth date

4. What is your date of birth?

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

## Residency

5. What is your residency status? (tick one box)

New Zealand Citizen – born in New Zealand ▶ Go to Question 8

New Zealand Citizen – not born in New Zealand

Date of citizenship

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

Day Month Year

Permanent resident

Date permanent residence granted

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

Day Month Year

Other ▶ What is your residency status?

**Q5 note:** A permanent resident is someone who has a residence class visa or residence permit.

## Residency – continued

**Q8 note:** This means that you consider New Zealand to be your home, you are a legal resident, you normally live here and intend to stay permanently.

6. When did you arrive in New Zealand?     
Day Month Year

7. Where were you born?  
Town/city  Country

8. Do you normally live in New Zealand?  
 No  Yes

## Living or working overseas

**Q9 note:** If you can't remember the exact day, we will accept the month and year.

This information is required to assess eligibility to any overseas benefits and pensions.


For more information call us on **0800 777 227**.

9. Have you lived or worked in any countries outside New Zealand?  
 No  Yes ▶ Please provide details below:

Name of country	Entry date	Exit date	Purpose (eg working, living etc)
	/ /	/ /	
	/ /	/ /	
	/ /	/ /	
	/ /	/ /	

## Overseas pensions and benefits

**Q10 note:** We need you to tell us this because your payments may be affected if you receive or are eligible to receive an overseas pension or benefit.

 Please attach any documents to your completed application form that confirm the payment(s), eg pension certificates.

If you receive more than two payments, please attach a separate sheet showing the details.

10. Are you receiving, or do you qualify for a pension from overseas?  
 No ▶ Go to Statement section below  Don't know

Yes ▶ Please provide details below:

11. If 'Yes', what type of pension are you receiving, or do you qualify for, from overseas?

Retirement or old age  War service  Disability or invalidity  
 War widow  Widow or survivor  War restitution  
 Superannuation  War injury  Child or dependant  
 Other payments

12. Please provide details about the types of payment you are receiving:  
(If you are not sure of any payment you may qualify for then leave this question blank)

Your payment details	Pension 1	Pension 2
Country the payment comes from:		
How much do you receive in each payment (in overseas currency)?		
Is this amount before or after tax?		
How often do you receive this payment (eg weekly, monthly, annually)?		
Overseas payment reference number:		
Name of your pension, benefit or allowance:		

## Statement

The information I have given is true and complete and I have not left anything out.

I understand that the Ministry of Social Development will release such information as necessary to an overseas social security agency.

I am also aware of and understand the Privacy Act statement contained within this application form.

Spouse/partner's name (print)

Spouse/partner's signature

Date

    
Day Month Year

## Who can get extra help?

You may be able to get extra financial or other help. What you qualify for depends on your personal situation. You can apply for extra help at any time.

Most extra help is income tested and some is also asset tested. If you would like to know more about what help is available or you would like to apply for extra help, please let us know.

**For more information about extra help and application forms go to [www.seniors.ms.govt.nz](http://www.seniors.ms.govt.nz) or you can phone us on ☎ 0800 552 002.**

## Disability Allowance

If you, or a family member, have a disability or medical condition likely to continue for at least six months, you may be able to get help with costs such as ongoing visits to the doctor, medicines, medical alarms, travel, and some other costs.

Disability Allowance is income tested.

### 39. Do you want to apply for a Disability Allowance?

No  Yes ► You will need to complete the Disability Allowance Application

## Accommodation Supplement

If you have costs from owning your own home, renting, or boarding, you may be able to get extra help through Accommodation Supplement. How much you get will depend on your income, assets, accommodation costs, family circumstances and where you live.

Accommodation Supplement is income and asset tested.

If you or your spouse/partner have a tenancy agreement with Housing NZ, you won't be able to get Accommodation Supplement.

### 40. Do you want to apply for Accommodation Supplement?

No  Yes ► You will need to complete the Accommodation Supplement Application

## Temporary Additional Support

Extra help with essential costs may be available through Temporary Additional Support.

It's important that you take all necessary steps to get other assistance towards costs and take reasonable steps to increase income and reduce costs where possible.

To get Temporary Additional Support, your assets will need to be below a certain level.

### 41. Do you want to apply for Temporary Additional Support?

No  Yes ► You will need to complete the Temporary Additional Support Application

## Community Services Card

The Community Services Card can help you with the costs of health care. You'll pay less for some health services and prescriptions.

To be eligible for the Community Services Card, your income must be below a certain level.

### 42. Do you want to apply for a Community Services Card?

No  Yes ► You will need to complete a Community Services Card Application

## Dependent children in your care

A dependent child is a child who is financially supported by you and is living with you as a member of your family.

If you have dependent children in your care you may be able to get other forms of financial assistance. Please ask us about this.

## Statement

Please read this statement carefully and sign.

**I must tell the Ministry of Social Development immediately if either my spouse/partner or I:**

- have changes to personal details (such as name, address or bank account number)
- have changes to my / our living situation (such as marriage or separation, entering or ending a civil union, starting or ending a de facto relationship with someone of the same or opposite sex, starting or stopping living alone)
- intend to travel or move overseas
- are admitted to or discharged from hospital
- have been granted or are eligible for an overseas pension or benefit
- are imprisoned/held in custody on remand
- have any other change that may affect my/our New Zealand Superannuation entitlement or rate.

**If my spouse/partner is included in my New Zealand Superannuation then I must tell the Ministry of Social Development immediately if either my spouse/partner or I:**

- have a change in work situation (such as starting paid part-time, casual or full-time work)
- have become self employed/start to run a business
- have changes to my/our income or financial circumstances.

**My obligations have been explained to me and I understand my responsibilities.**

The information I have given is true and complete and I understand the conditions for receiving New Zealand Superannuation.

I am also aware of and understand the Privacy Act statement contained in this application form.

Client's name (print)

Client's signature

Date

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





