

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

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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



If 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

☐ 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 (private arrangement or through Inland Revenue)

☐ 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

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

☐ No ☐ Yes

↓ If 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.

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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).

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

☐

No

☐

Yes



If yes, 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



If yes, 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?
	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 Q85:
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 home, bach/crib, investment property.

12

 **ATTACHMENT FOR Q13:**

You may be asked to provide proof of these details.

13


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

Property you don't live in	<input type="checkbox"/> No	<input type="checkbox"/> Yes
Boat, caravan or motorhome	<input type="checkbox"/> No	<input type="checkbox"/> Yes
Other	<input type="checkbox"/> No	<input type="checkbox"/> 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 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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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.

<input type="checkbox"/> No	<input type="checkbox"/> Yes	<div>↓ If yes, please write the name of the trust</div>
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Name of trust

Signature

The information I have given you is true and complete.

Applicant's name (print)	Applicant's signature	Day	Month	Year
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
Applicant's partner's name (print)	Applicant's partner's signature	Day	Month	Year
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>