



Work and Income
Te Hiranga Tangata

A service of the Ministry of Social Development

CLIENT NUMBER

Please read this before you start

If you're currently receiving payments from Work and Income and want to apply for New Zealand Superannuation, please complete this form and make an appointment to see a case manager. Alternatively, you can choose the online application process at www.seniors.msd.govt.nz.

Any financial assistance you currently receive will be reviewed when you apply.

New Zealand Superannuation payments are paid fortnightly.

Please complete all questions in pen. Please initial any changes you make.

For more information, call us on ☎ **0800 552 002**, or visit our website www.seniors.msd.govt.nz.

SuperGold Card

A SuperGold Card is sent to you automatically when you get New Zealand Superannuation.

If you qualify for a Community Services Card these details will be printed on the back of your SuperGold Card.

If you want to apply or if you already have a Community Services Card that hasn't expired yet, you will need to complete the *Community Services Card Application for clients applying for, or already receiving, New Zealand Superannuation (CSC2)*.

What you need to bring



Please ask Work and Income staff for help if:

- you do not have any of the documents we have asked for
- you think there could be a delay in providing this information
- you would like to know about extra help.

When you apply for New Zealand Superannuation, you will need to complete this application form and provide the following:

- 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's 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 or more documents supporting your identity. These could include your marriage certificate, bank statement, phone or power account, driver's licence, etc

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

- Proof of any name change
- Proof of any income you receive
- Trust documents (eg Trust Deed)
- Proof of bank account details

What if I have a spouse/partner?

We need identification for your spouse/partner to make sure we pay you the correct rate of New Zealand Superannuation and to check if they are eligible for any overseas pension.

If you have a spouse/partner, regardless of whether or not you are including them in your payment, you need to provide the following information about them:

- A birth certificate or passport, and one other form of identification (eg driver's licence)
- Proof of any name change

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

You may want to include your spouse/partner in your New Zealand Superannuation if they do not qualify for their own New Zealand Superannuation.

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/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.
- Work and Income 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, 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 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).
- Work and Income may give employers information about you if you use our employment services.
- Work and Income may share information you have given us with childcare centres to administer your entitlement to childcare assistance.
- You are not required to give us information, but if you do not give us all the information we ask for, your application for benefits/pensions 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.

Obligations

It is important that you tell us about any changes to ensure we pay you correctly. Changes in your living situation include:

- 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.

I must tell Work and Income immediately if either my spouse/partner or I:

- have changes to personal details (such as name, address or bank account details)
- have changes to my/our living situation
- intend to travel overseas
- am admitted to or discharged from hospital
- have been granted an overseas benefit/pension
- am imprisoned/held in custody on remand
- have any other changes that may affect my/our New Zealand Superannuation entitlement or rate.

If my spouse/partner is included in my New Zealand Superannuation entitlement then I must tell Work and Income immediately if either my spouse/partner or I:

- have a change in work situation
- become self employed/start to run a business
- have changes to my/our income or financial circumstances.

New Zealand Superannuation Application – Current Clients



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Personal details

Q2 note: Give any other names that you use now or have used in the past.

Q6 note: You can work out your tax code using the online calculator at www.ird.govt.nz or phone Inland Revenue on ☎ 0800 227 774.

Q9 note: This means that you consider New Zealand your home, you are a legal resident, normally live here and intend to stay permanently.

Q11–12 note: If you receive or may qualify for a pension from another country, this can affect how much New Zealand Superannuation you are paid. We will let you know if you have to test your eligibility to an overseas pension.

Q13 note: If you are an ex-service person and you're disabled, you may be able to get the War Disablement Pension or Veteran's Pension. For more information call Veteran's Pension Centre free on ☎ 0800 650 656.

1. What is your name on your birth certificate?

First name(s) Surname or family name

2. Are you known by or have you used any other names?

No Yes ▶ Please provide details below:

1.

2.

3. What is your date of birth?

Day Month Year

4. How can we contact you? (Please tick your first preference)

Mobile phone Home phone Work phone

Email Fax

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

No Yes

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

7. How many years have you lived in New Zealand since turning 50 years old?

▶ If 10 years or more, go to Question 9

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

9. I normally live in New Zealand and intend to stay here.

No Yes

10. Do you regularly visit any country outside New Zealand?

No Yes ▶ Please provide details below:

Name of country	How often do/will you go?	How long do/will you stay?	Reason for visit
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

11. I have lived and/or worked in another country/countries outside New Zealand.

No Yes ▶ Please provide details below:

Name of country	Entry date	Exit date	Purpose (eg working, living)
<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"/> / <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"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>

12. I receive or may qualify for a social security pension from an overseas government.

No Yes

13. I have served with the New Zealand Armed Forces.

No Yes

Spouse/partner

14. I have a spouse/partner. No ▶ Go to Question 21 Yes

15. My spouse/partner's details are:

First name(s) Surname or family name

Date of birth?
Day Month Year

Q16 note: You may want to include your spouse/partner in your New Zealand Superannuation if they do not qualify for it in their own right. In this situation, New Zealand Superannuation is income tested.

Q18 note: This means that your spouse/partner is a legal resident, normally lives here and intends to stay permanently.

Q19 note: Any time spent overseas may affect entitlement to New Zealand Superannuation.

16. I wish to have my spouse/partner included in my New Zealand Superannuation.

No Yes ▶ Please provide proof of **all** your income

17. My spouse/partner lives at the same address.

No Yes

18. My spouse/partner normally lives in New Zealand and intends to stay here.

No Yes

19. My spouse/partner has lived and/or worked in another country outside of New Zealand.

No Yes ▶ Please provide details below:

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

20. My spouse/partner receives or may qualify for a social security pension from an overseas government.

No Yes

Living Alone

Q22 note: If you do not live alone you may still qualify:

- when a child under the age of 18 years is living with you
- when a dependent child aged 18 years still attends school.

Q23 note: Examples of 'Relationship' can include:

- dependent child
- spouse/partner
- sister/brother
- boarder/flatmate.

Q25 note: 'Self-contained' means there is a kitchen or kitchenette and a bathroom.

21. I want to apply for the Living Alone Payment?

No ▶ Go to Question 26 Yes

22. Do you live alone?

No

Yes ▶ When did you start living alone? ▶ Go to Question 24
Day Month Year

23. Please provide details for anyone you live with:

	Relationship to you	Age	Date of birth (if aged 18 years or under)	Does this person attend school or a tertiary institution?
Person 1			/ /	
Person 2			/ /	
Person 3			/ /	


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

No Yes ▶ If you have a visitor(s) staying with you for more than 13 weeks in any 26 week period you may not be eligible for the Living Alone rate of payment.


25. What is your accommodation?

- House or flat A room in a licensed 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:

Extra help

 You may be asked to provide proof of your/your spouse/partner's income and assets, including:

- payslips
- **all** bank statements.

 You will need to provide Trust documents, eg Trust Deed.

26. I wish to receive Extra Help with my New Zealand Superannuation.

No ▶ Go to the Privacy Statement on page 5 Yes

27. Have your income and asset details changed since you last advised us? No Yes

28. Are you and/or your spouse/partner the beneficiary of a Trust(s)? No Yes

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 - providing support and services for you and your family
 - providing education related services
 - providing employment related services
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- Work and Income 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, 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 and the Netherlands).
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Statement

The information I have given, or that has been given about me in this application is true and complete. I/We understand the conditions and obligations for receiving New Zealand Superannuation and extra help (if applicable).

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

Name (print)

Client's signature

Day	Month	Year

Spouse/partner's name (print)

Spouse/partner's signature

Day	Month	Year

OFFICE USE ONLY

CASE MANAGER'S CHECKLIST

Has the client provided proof of the following:

Identification No Yes

Bank account details No Yes

SNG: One-off financial assistance checked and processed if required. No Yes

INCOME/ASSETS: Income and assets updated. No Yes

EXTRA HELP: All Extra Help has been reviewed. No Yes

SUPERGOLD: Client has been advised that they will automatically receive a SuperGold Card. No Yes

CSC2: Application received. No Yes No ▶ Please provide CS2 form Yes

Additional information:

I confirm the critical data for authenticating has been copied, signed and attached:

Processor's signature

▶

Day	Month	Year

I have checked critical data and confirm the decision is correct:

Checker's signature

▶

Day	Month	Year

I have sighted original critical data:

Authenticator's signature

10% 100% Critical data

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▶

Day	Month	Year

Bring up

B	F
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Day	Month	Year