



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.

Being included in your spouse/partner's New Zealand Superannuation

You may be included in your spouse/partner's New Zealand Superannuation if you don't qualify yourself and if your spouse/partner chooses to include you.

A spouse/partner is:

- your husband or wife
- your Civil Union partner
- a person of the same or opposite sex with whom you have a de facto relationship.

You also need to be lawfully resident in New Zealand.

How income could affect the payments

If you are included in your partner's New Zealand Superannuation, any income either of you receive may affect how much you get. We can help work out what the best option is for you and your spouse/partner.

Your income can also affect any **extra** financial help you might get.

How to contact us

You can:

- visit our website at www.seniors.msd.govt.nz
- phone us on ☎ **0800 552 002**
- email us at seniors@msd.govt.nz
- free fax us on ☎ **0800 999 996**.

What you need to provide

So that 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
- Proof of your and your spouse/partner's income details.

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.

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 have applied for an overseas pension or benefit
- are imprisoned/held in custody on remand
- have any other change that may affect your New Zealand Superannuation entitlement or rate.

If you are included in your spouse/partner's New Zealand Superannuation you must tell the Ministry of Social Development immediately if either of you:

- have a changes 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 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 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 – Spouse/Partner



Work and Income
Te Hiranga Tangata

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CLIENT NUMBER
(if known)

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Before you start

This form must not be completed by the person who qualifies for New Zealand Superannuation.

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 2 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

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.

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.

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.

6. Where do you live?

Flat/house no.

Street name

Suburb

City

Q7 note: Mailing address includes:

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

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**.

Bank details

Q11 note: You will need to provide proof of your bank account details.

11. 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

12. What is your Inland Revenue tax number?

Ethnic group

Q13 note: You don't have to answer this question if you don't want to.

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

13. 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

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

New Zealand Citizen – born in New Zealand ▶ Go to Question 17

New Zealand Citizen – not born in New Zealand

Date of citizenship

Day	Month	Year

Permanent resident

Date permanent residence granted

Day	Month	Year

Other ▶ What is your residency status?

15. When did you arrive in New Zealand?

Day	Month	Year

16. Where were you born?

Town/city Country

17. Do you normally live in New Zealand?

No Yes

18. 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)

Living or working overseas

Q19 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**.


19. 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

Q20 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.

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

- No ▶ Go to Question 23 Don't know
- Yes ▶ Please provide details below:

21. 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

22. 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:		

Your employment

Q23 note: Paid employment includes employment for when you receive non-monetary benefits, eg free board, payments in kind, or drawings from a business.

23. Have you been working in the last 52 weeks?

- No ▶ Go to Question 28
- Yes

24. Are you still working?

- No ▶ What was your last day of work? / / ▶ Go to Question 28
Day Month Year
- Yes ▶ Is the job: Full-time Part-time Casual
- Seasonal Voluntary Self employed

Q25 note: Give the name, telephone number and address of the firm or person you work for.

25. Who are you working for?

1.
2.

Q26 note: Give gross (before tax) amount of wages and the value of any non-monetary benefits received, eg free board or any drawings from a business.

26. How much is your gross weekly wage? \$

Q27 note: Give the name and address of each employer, and the start and end dates of your employment.

27. Have you had any other employment in the last 52 weeks apart from that answered in Questions 24–26?

- No Yes ▶ Please provide details below:

Who did you work for?	Start date	Finish date
	/ /	/ /
	/ /	/ /
	/ /	/ /

Your spouse/ partner's employment

Q28 note: If you are included in your spouse/partner's New Zealand Superannuation, any income you or your spouse/partner receive could affect how much you get. We can help you work out what the best option is for you.

Q29 note: Give the name, telephone number and address of the firm or person your spouse/partner works for.

Q30 note: Give gross (before tax) amount of wages and the value of any non-monetary benefits received, eg free board or any drawings, whether or not the business makes a profit.

Q31 note: Give the name and address of each employer, and the start and end dates of your spouse/partner's employment.

28. Is your spouse/partner working?

No ▶ What was their last day of work? / / ▶ Go to Question 31
Day Month Year

Yes ▶ Is the job: Full-time Part-time Casual
 Seasonal Voluntary Self employed

29. Who is your spouse/partner working for?

1.
2.

30. How much is their gross weekly wage? \$

31. Has your spouse/partner had any other employment in the last 52 weeks apart from that answered in Questions 29–31?

No Yes ▶ Please provide details below:

Who did they work for?	Start date	Finish date
<input type="text"/>	/ /	/ /
<input type="text"/>	/ /	/ /
<input type="text"/>	/ /	/ /

Income

32. Do you or your spouse/partner get income from any of the following sources? If you answer 'Yes' you need to provide details in Question 33.

Interest from investments, savings or other assets No Yes

Accident Compensation No Yes

Overseas pensions or benefits No Yes

Other superannuation (including Government, private, or armed forces) No Yes

Self employment, farm or business income No Yes

Income from rent No Yes

Unit trust/managed funds No Yes

Trusts No Yes

Reverse annuity mortgage/mortgage or similar No Yes

Payment from an estate No Yes

Dividends from shares No Yes

Other No Yes

If you have only answered 'No' please go to Question 34.

Income – continued

Q33 and 34 note: You may be asked to provide proof of these details.

33. Please provide details for any income answered 'Yes' in Question 32. Give gross (before tax) amount.

Where did it come from?	You	Your spouse/partner	Joint income
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

34. Do you or your spouse/partner expect to get other income in the next 52 weeks?

No Yes ► Please provide gross (before tax) income details below:

Where did it come from?	You	Your spouse/partner	Joint income
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

Sold assets


35. Have you or your partner (if you have one) sold any assets over the last 5 years?

Please include assets sold to a trust(s), family members, business or charitable organisations.

No Yes ► Please provide details below and attach a copy of the sale documents, including any distribution statements:

What was the asset?	When was the asset sold?		
	Day	Month	Year
1.			
2.			
3.			

Who did you sell the asset to?	What was the asset sale price?
1.	\$
2.	\$
3.	\$

 You will need to provide proof of the sold assets. If you can't do this, please talk to us.

Gifted assets

36. Have you or your partner (if you have one) ever gifted, transferred or disposed of any cash or non-cash assets *at any time*?

Please include assets gifted or transferred to a trust(s), family members, business or charitable organisations.

No Yes ▶ Please provide details below and attach proof of these details:

When was the asset gifted, transferred or disposed of?

What was the asset?


Day Month Year

1.			
2.			
3.			
4.			

Who did you gift, transfer or dispose of the asset to?

What is the asset worth?

1.	\$
2.	\$
3.	\$
4.	\$

 You will need to provide proof of the fully or partly gifted assets. If you can't do this, please talk to us.

Trusts

37. Are you, or have you or your partner (if you have one), ever been involved in a trust, as a settlor, transferor, trustee or beneficiary?


- *Settlor* is a person who sets up the Trust, usually by making a gift of assets and/or property.
- *Transferor* is someone who transfers assets to a Trust.
- *Trustee* is a person who manages the Trust, and makes decisions about the distribution of income from the Trust.
- *Beneficiary* is someone who benefits from the Trust, eg by receiving income such as Trust distributions.

A person can be a settlor, transferor, trustee or a beneficiary of a Trust, a combination of these or can be all four.

No Yes ▶ Please provide details below:

Trust name

--

 You will need to provide Trust documents, eg trust deed, deed of debt, gift statements, accounts, etc.

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.msd.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.

38. 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.

39. 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.

40. 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.

41. 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.

Declaration

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.

As I am being included in my spouse/partner's New Zealand Superannuation entitlement 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.

Your name (print)

Your signature

Date

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

Your spouse/ partner's agreement

This section must be completed by the person who qualifies for New Zealand Superannuation.

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

Spouse/partner's name (print)

Spouse/partner's signature

Date

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

