

Questionnaire – 31 March 2018

Working for Families Tax Credit

Please ensure this questionnaire is completed and included with your records.

CLIENT NAME:



The more information you complete/provide now will save us both time



Working for Families

Do you have children aged under 18 years, or 18 years and attending secondary school or territory education?

Yes

No

If yes, please complete the following information

<u>Names of Children</u> (Who were cared for and financially dependent on you.)	<u>Date of Birth</u>	<u>IRD Number</u>

Adjustments to your Family Income for Working for Families Tax Credits

There have been changes to the types of income you must tell us about when applying for and receiving Working for Families Tax Credits. **We need to know if you received income from the following sources as this is important for the entitlement calculation.**

- Have you received any income from any other sources that we don't administer?
- Attributable trustee income.
- Attributable fringe benefits.
- Passive income of children.
- Income of non-resident spouse.
- Any payments used for day to day living expenses?
- Pensions and Annuities.
- Other payments.
- Income equalisation scheme deposits (excludes "adverse events" deposits).

Our advice is, if in doubt, tell us the income and we can advise accordingly with reference to the legislation whether the type of income needs to be included in the family income calculation for an entitlement.

Parental Tax Credits

If you had a baby in the past twelve month the child will require an IRD number

- Have you had a baby during the year? **YES/NO**
- If YES, have you applied for Parental Tax Credit? **YES/NO**

Family Changes

- Has there been any change in you marital status (this included defacto) during the previous year? **YES/NO**
- Has there been a shared custody arrangement? **YES/NO**

Child Support

Did you pay child support to an ex-partner? **YES/NO**

- If yes how much did you pay? \$ _____
- Did you receive child support from an ex-partner? **YES/NO**
- If yes how much did you receive? \$ _____

In Work Payment

You may be entitled to an In Work Payment depending on the weekly hours worked

In a single parent family you need to work more that 20 hours, for a two parent family you need to work more that 30 hours per week combined.

- Does you family meet these requirements?
- If YES, please provide number of hours worked

Parent 1

Parent 2

If your spouse files his/her own tax return, we will need a copy of this return to calculate the total family income.