



**WORKING FOR FAMILIES  
SUPPLEMENT**

Please complete this supplement and forward to us with your end of year questionnaire.

Please note, that we can only provide an estimate of your WFTC entitlement. The IRD will make the final determination of your entitlement based on further information they may have.

<p><b>DETAILS OF CHILDREN</b></p> <p>Please give details of all children’s names, birthdays and IRD numbers that are still dependent. If your child left school during the year please advise the date of leaving school.</p> <p>If you expect your income to be down this year, you may be eligible for Family Assistance. Please supply copies of the children’s birth certificates if not previously supplied to us.</p> <p><b>IMPORTANT:</b> The Inland Revenue Department will not refund any amounts until ALL children have IRD numbers. If your children <u>do not</u> have IRD numbers please contact the IRD as soon as possible.</p> <table border="1"><thead><tr><th>Child Name</th><th>Date of Birth</th><th>Date left School</th></tr></thead><tbody><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr></tbody></table>	Child Name	Date of Birth	Date left School																			
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<p><b>FAMILY ASSISTANCE RECEIVED</b></p> <p>Did you receive family assistance during the year? If yes, please supply family assistance certificate (IR541).</p>	YES / NO																					
<p><b>MAINTENANCE RECEIVED / PAID</b></p> <p>Did you receive from or pay to a former spouse or partner any maintenance? If yes, please give amount paid or received.</p>	YES / NO																					
<p><b>SPOUSES / PARTNERS INCOME</b></p> <p>Do we prepare your spouses / partners tax return? If not, please provide details of their income.</p>	YES / NO																					
<p><b>FAMILY INCOME</b></p> <p>Do we complete the tax returns for all of your immediate family members and associated entities? If <b>not</b>, please provide details of their income.</p>	YES / NO																					
<p><b>FURTHER AMOUNTS NOW INCLUDED AS FAMILY INCOME:</b></p> <p><b>Attributable Trustee Income</b></p> <p>Are you a settlor or trustee of a trust that we do not complete a tax return for? We will require copies of that Trusts Financial Statements and Tax Return.</p>	YES / NO																					

<p><b>Fringe Benefits</b> If you are a shareholder in a company that provides you a fringe benefit such as a motor vehicle</p>	<p><b>YES / NO</b></p>
<p><b>PIE and Non-Resident Income</b> Most PIE income and Non-Resident income now needs included</p>	<p><b>YES / NO</b></p>
<p><b>Passive Income of Children</b> Any interest or dividends earned by children, if it amounts to more than \$500/child</p>	<p><b>YES / NO</b></p>
<p><b>Pensions and Annuities</b> Please provide detail of any further pensions you may be receiving (other than NZ Super)</p>	<p><b>YES / NO</b></p>
<p><b>Other Payments, including</b> Payments received from persons/entities that are used for family day to day expenses if total is more than \$5,000/year. For example if grandparents provide payment for childcare /education/medical expenses or help to pay bills such as rent or phone.</p>	<p><b>YES / NO</b></p>
<p><b>We will require details of the above to correctly estimate your Working for Families Entitlement. If you have any questions concerning the changes to 'Family Income' please contact the office.</b></p>	

I confirm that all of the information provided above is true and correct to the best of my knowledge and belief and accept responsibility for the accuracy and completeness of the information provided.

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_