

Working for Families Questionnaire



Client

Year.....2017/18

Provide details of **all** children in your care, **if this is the first year** we are calculating your entitlement:

Name

Date of Birth

Please advise the following for any children **born or leaving school during the year:**

Name

Date of Birth

** Did you receive income from a Trust this year?

YES/NO

If so provide details:

** Are you a settlor of a Trust with undistributed income (income left in the Trust) this year?

YES/NO

If so provide details:

Did you receive more than \$5,000 for the year (whether taxable or not), which was used for the family's day to day living expenses, from any other person or entity?

eg: loss of earnings insurance or household expenses paid by someone else

If so provide details:

YES/NO

**** Only provide details if Business and Tax Centre does not handle the Trust or Company accounting.**

Did you or your partner receive any PIE (Portfolio Investment Entity) income?
Exclude any superannuation fund or retirement scheme (Kiwisaver) YES/NO
If so provide details:

Do any of your dependant children receive **passive** income over \$500 annually?
(Includes: Investments/Rent/Trust Income) YES/NO
If so provide details:

Did you or your spouse earn income overseas this year? YES/NO
If so provide details:

**Do you have more than a 10% shareholding in a Company with undistributed profits? (Profits left in the Company) YES/NO

Have you received or paid Child Support during the year? YES/NO
Please advise:

I request that Business & Tax Centre Ltd calculates Working for Families entitlements based on the information provided above. I accept absolute responsibility for the accuracy and completeness of the information provided.

Signed

Date