

# Working for Families Questionnaire

Client .....

Year.....2018/19

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

<u>Name</u>	<u>Date of Birth</u>

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

<u>Name</u>	<u>Date of Birth</u>

\*\* 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 .....