



We just love a good completed questionnaire!

2021 WORKING FOR FAMILIES TAX CREDITS/ SUPPLEMENTARY QUESTIONNAIRE

NAME:

SIGNED:

DATE:

1 WORKING FOR FAMILIES TAX CREDITS

Please provide the following information to allow us to calculate your entitlement:

Spouse's Name:

Spouse's IRD Number:

Spouse's Taxable Income:

Spouse's D.O.B.

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| Names of Children | Date of Birth | IRD Number | Date Child Left School |
|-------------------|---------------|------------|------------------------|
| | | | |
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If any of the children do not have an IRD number, please complete an IR595 form which is available from the AA or Postshops. Alternatively this could be downloaded from Inland Revenue's website. If you would like Perriam and Partners to attend to this on your behalf, please let us know.

Number of weeks that you and/or your spouse worked 30 hours or more during the year or 20 hours yourself only:

Child Support

Please provide the amount received during the year.

\$ _____

Yes No

Is there a shared care arrangement?

Have there been any changes in family circumstances during the year (eg marriage, separation)? If yes please provide details, date and nature of change.

WFFTC

Types of income that are included as family income for WFFTC purposes.

Please supply details of income from the following sources:

- a.** Are you a settlor for any Trust that we do not act for? Any trust income retained in a Trust as Trustees income must be included as family income for WFFTC. \$ _____
- b.** Details of any Fringe benefits for whom you are a shareholder employee and hold 50% or more of the voting right in a Company that we do not act for? \$ _____
- c.** PIE income. Please include income details for all PIE investments. \$ _____
- d.** Income of dependent children. Passive income of the children is included as WFFTC income if the children received over \$500 a year per child from the following sources:
- Interest & Dividends \$ _____
 - Royalties \$ _____
 - Rent \$ _____
 - Beneficiary income \$ _____
- e.** Income from Non-resident spouse. If your spouse or partner, who is not a tax resident, is earning an overseas income then their worldwide income is now part of family income for WFFTC. \$ _____
- f.** Pensions and Annuities. This includes 50% of the amount of pension or annuity payments from Life insurance policies or superannuation fund (excluding NZ Super). \$ _____
- g.** Other payments. These are payments from any other person or entities that are used for the family's day-to-day living expenses. If the total amount of these payments is more than \$5,000 for the tax year, then the total amount of these payments must be included for WFFTC. A payment is considered to be used to meet day-to-day living expenses if it is:
- replacing lost or reduced income (e.g. payments from an insurance policy that covers loss of earnings/employment)
 - used to pay regular debts (for example, car payments, hire purchases, mortgage, loans)
 - used to meet the family's usual living expenses (e.g. monthly phone bill or power bill)
 - paid directly by another person on behalf of the principal caregiver, or their family members, for regular expenses (e.g. paying the power, phone, gas bills directly).
- \$ _____
- h.** Salary in exchange for private use of motor vehicle
Did you accept a lower salary in exchange for the use of a business vehicle?
What is the amount of salary forgone? \$ _____
Use of Employer Credit facilities or vouchers from Employer
- i.** Have you received any goods/services from your employer that you have not reimbursed your employer for?
Have you received any vouchers (e.g. petrol) from your employer that is addition to your salary? \$ _____

THANK YOU

Lastly, you've got this far, so many thanks for completing this questionnaire.