

Working for Families Tax Credits – adjustments to your Family Income

The adjustments to your family income for the calculation of Working for Families Tax Credits have significantly changed from 1st April 2011.

We are required to have this signed questionnaire returned to us before we can finalise your tax return.

Please advise if any of the following applies to you: ***If you are unsure of any of the income categories listed, please contact your Accountant Manager for clarification before signing.***

Attributable trust income:

– do you or your spouse have any trusts that we are unaware of that you have established or contributed funds to? **YES/NO**

Attributable fringe benefits:

- are you or your spouse a shareholder employee of any company that we are not aware of? **YES/NO**

PIE income:

- do you or your spouse have any Portfolio Investment Entity (PIE) investments (other than a superannuation fund or retirement savings scheme eg Kiwisaver) **YES/NO**

Passive income of children:

- do any of the children in your care receive any of the following types of income totaling over \$500 a year: **YES/NO**

- Resident passive income (eg interest, dividends, taxable Maori Authority distribution)
- Royalties
- Rents
- Beneficiary income
- Distributions from a listed PIE
- Attributed income from a PIE that is not a superannuation fund or retirement savings fund

Income of non-resident spouse:

- do you have a non-resident spouse earning income overseas? **YES/NO**

Tax exempt salary or wages:

- do you or your spouse receive any tax exempt salary or wages? **YES/NO**

Pensions and annuities:

- do you or your spouse receive any pension or annuity amounts from life insurance policies or a superannuation fund (excluding NZ super) **YES/NO**

Other payments:

- do you or your spouse receive payments of more than \$5,000 per year from any other person or entities that are used for the family's day to day living expenses? **YES/NO**

Income equalization scheme deposits:

- have you or your spouse made any deposits to an income equalization scheme (this is mainly to do with the farming/horticultural sectors)? This includes deposits made by your trust, or a company controlled by you or your trust? **YES/NO**

I confirm that the above is true and correct.

Name: _____

Signature _____

Date _____

If you have answered YES to any of the above questions, we will contact you to obtain further information.