

2018 WORKING FOR FAMILIES TAX CREDITS QUESTIONNAIRE

NAME:

Balance Date:

Please update your contact details below if there have been any changes:

Phone:

Fax:

Mobile:

E-mail:

Postal address:

Please take the time to work through this questionnaire thoroughly and action each point that is applicable to you. This will greatly assist us in the efficient preparation of your Working for Families Tax Credit claim.



Did you receive Working for Families Tax Credit payments during the year from IR?	Yes / No	
Please provide details of all children for whom a Family Tax Credit entitlement may be calculated:		
Name of Child	Date of Birth	Date Left School
_____	__/__/__	__/__/__
_____	__/__/__	__/__/__
_____	__/__/__	__/__/__
_____	__/__/__	__/__/__
_____	__/__/__	__/__/__
Do you have full custody of your children?		Yes / No
If not, please provide further details		
Did any children become ineligible (left school, living with other carer) during the year?		Yes / No
Have you married, separated or otherwise changed your family circumstances during the year to 31 March 2018?		Yes / No
If so, please provide details		
Have any children under 18 years of age left school but continued their education at another institution? e.g. university, polytechnic		Yes / No
If so, please provide details of the institute attended and the commencement date		
Were you a full time wage/salary earner during the year? (20 hours + /week single parent or 30 hours +/week for two parents)		Yes / No
If so, for how many weeks of the year?		_____weeks
If we do not prepare your spouse's tax return please provide details of their 2017 taxable income.		
Did you receive any child support or maintenance from an ex-partner, either directly or via Inland Revenue?		Yes / No
If yes, please supply details and amounts.		



Did you receive income from an overseas pension? If yes, please supply details and amounts	Yes / No
Do you have a shareholding of 10% or more in a company which Mackay Bailey Ltd does not prepare the annual report for? If yes, please supply a copy of the annual report.	Yes / No
Did you receive any distribution prior to retirement from a superannuation scheme? If yes, please supply details	Yes / No
If the distribution comes from a scheme which your employer also contributes to, please provide details of your contributions and your employers' contributions for the tax year and two previous years.	
Did you receive any Portfolio Investment Entity (PIE) income or distribution, including distributions which don't need to be included in your income tax return and KiwiSaver income? If yes, please supply details and amounts	Yes / No
Did you receive any payments from life insurance policies or a superannuation fund (excluding New Zealand superannuation)? If yes, please supply details and amounts	Yes / No
Did any of your dependent children receive investment income of more than \$500 (e.g. interest, dividends, rent, beneficiary income from a trust?) If yes, please supply details and amounts	Yes / No
Do you have a spouse, civil union or de facto partner who was non-resident for all or part of the year? If yes, please supply details and amounts of both non-resident and resident income.	Yes / No



Did you receive salary or wages that are exempt under specific international agreements (e.g. salary from the United Nations?)

Yes / No

If yes, please supply details and amounts

Did you receive any other payments, or more than \$5,000 in total for the year, from any source that were used to replace income of the family or to meet usual family living expenses (e.g. cash received from relatives to help with child care or education; payments made on your behalf by relatives)?

Yes / No

If yes, please supply details and amounts

Thank you for completing this questionnaire.