

New Zealand Superannuation partner application



MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

This form is about the **partner** of the the person who qualifies for NZ Super, so it should be completed by the partner.
There's a small section on page 20 for the partner who qualifies for NZ Super to complete and sign.

Tell us about yourself

If you've received a benefit or extra financial help from us before, write your client number here if you know it. This number can be found on your Community Services Card if you have one.

Client number

||

Tell us the names you have been known by

1

What is your full name?

Mrs Miss Ms Mr Other

First and middle names

Surname or family name

ATTACHMENT FOR Q1:

Bring proof of who you are. What you need to bring is explained on page 3.

2

Is the name on your birth certificate the same as above?

No Yes

First and middle names

Surname or family name

HOW TO ANSWER Q3:

For example, have you had married names, English names, changes by deed poll, or aliases?

3

Have you ever been known by any other name?

No Yes

1.

2.

ATTACHMENT FOR Q3:

Bring your marriage certificate, deed poll, or other proof of any name change.

4

What name would you like us to call you?

The name I wrote in Question 1 The name I wrote in Question 2

Other

Tell us more about you

5

What date were you born?

Day Month Year

6

Are you:

Male

Female

Gender diverse

7

Are you currently receiving weekly compensation payments from ACC?

No

Yes

If you get weekly compensation payments through ACC, in most cases you can't get NZ Super for the same period. You may be able to get NZ Super if ACC have confirmed:

- you can get both payments for a period of time, or
- the date your ACC payment stopped.

If you need help call ACC on **0800 101 996**.

8

What is your Inland Revenue tax number?

9

What tax code do you want to use for your NZ Super payments?

You can work out your tax code using the online calculator at ird.govt.nz or phone Inland Revenue on **0800 227 774**.

INFORMATION FOR Q9:

If you don't give us a tax code, your payment will be taxed at the higher 'no-notification rate' of 45%.

ATTACHMENT FOR Q9:

If you use tax code 'STC' please provide proof from Inland Revenue.

Tell us how we can contact you

10

Where do you live?

Flat/House number. Street name.

Suburb

Town/City

11

Is your mailing address different from where you live?

No

Yes



Tell us your mailing address

HOW TO ANSWER Q10:

If you live in a rural area, flat/house number could include your RAPID number, fire number, emergency services number.

HOW TO ANSWER Q11:

Mailing address can include a PO Box, rural delivery details, or C/O address.

HOW TO ANSWER Q12:

Please only give us contact details you'd like us to use.

12

How else can we contact you?

Tick the best way for us to first contact you

Home phone	()	
Mobile phone	()	
Other phone	()	

13

Do you agree to get emails from us, including information about discounts and concessions for SuperGold Card holders?

No
 Yes

 I don't have an email address

A SuperGold Card will be sent to you automatically, once your NZ Super is granted. It gives you access to thousands of discounts and concessions from businesses around New Zealand and Australia, and to New Zealand government and/or local council services.

Tell us your ethnicity

14

Tick the group(s) you most identify with.

Māori

New Zealand European
 Niuean
 Samoan
 Indian

Other European
 Tokelauan
 Tongan
 Chinese

Cook Island Māori
 Other
 Do not want to answer

INFORMATION FOR Q14:

We collect this information for statistics we use in research and future development work.

Tell us about your residence status

15

Do you usually live in New Zealand?

No
 Yes

HOW TO ANSWER Q15:

This means you consider New Zealand your home, you're a legal resident, you usually live here and you intend to stay.

16

What best describes your residence status in New Zealand? Tick only one box.

New Zealand citizen by birth

Granted New Zealand citizenship

 Day Month Year

Granted permanent residency

 Day Month Year

Other

HOW TO ANSWER Q17:

If you were under 20 years old when you first arrived in New Zealand, we can accept an approximate date of arrival. If you were over 20 years old and are not sure of the actual date, talk to us and we can decide whether the date needs to be confirmed.

17

When did you arrive in New Zealand?

Day Month Year

18

What country were you born in?

19

Do you regularly visit any countries outside New Zealand?

Name of country you visit or will visit How often? How long? Reason for visiting (for example, holiday, working, living)

Tell us if you've lived or worked overseas

20

Have you ever lived or worked in any countries outside of New Zealand?

Don't include holidays of four weeks or less.

No

Go to question 23

Yes

Please list details below

Tick the reason(s) for being in each country

Name of country	Date you entered this country	Date you left this country	Holiday	Work	Visiting family	Study	Missionary work	Humanitarian work	Other

INFORMATION FOR Q20:

Periods of overseas residence may:

- affect entitlement to some benefits/pensions
- mean you're eligible for an overseas benefit or pension.

For more information, phone **0800 777 227**.

HOW TO ANSWER Q20:

Your reason for being in a country may be that you were there for a working holiday, you were living there, you were born there. If you don't know the exact date we'll accept a month and year.

21

Do you get or qualify for a social security benefit, pension or allowance from overseas?

You need to tell us this because your payments may be affected if you get or are eligible for an overseas pension or benefit.

No

Go to question 23

Don't know

Go to question 23

Yes

Tick the box that best describes your benefit, pension or allowance

Retirement or old age

Superannuation

Disability or health condition

Widow or survivor

Child or dependent

War related

Other

ATTACHMENT FOR Q22: **22**
 You'll need to show us proof of these payments, such as a pension certificate.

If you ticked 'yes' for question 21, please give details of the payments you get.

	Payment 1	Payment 2
What country does the payment come from?		
How much do you get each time the payment is made (in overseas currency)?		
Is this amount before or after tax?		
How often do you get the payment (for example: weekly, fortnightly, monthly)?		
What is the name of your pension, allowance or benefit?		
What is the payment reference number?		

Tell us your bank details **23**

ATTACHMENT FOR Q23:
 You need to provide proof of your bank account, such as a bank statement or deposit slip.

What bank account would you want your payments to be paid into?

The account is in the name of:

The account number is:

Bank	Branch	Account number	Suffix
■	■	■	■

Tell us whether you're a veteran **24**

Have you served with the New Zealand Armed Forces?

No Yes

If you've ticked 'yes', you may be entitled to a:

- Veteran's Pension (for more information call **0800 650 656**), and/or a
- War Disablement Pension or associated payments (for more information call Veterans' Affairs New Zealand on **0800 4 VETERAN (0800 483 8372)**).

Tell us about work in the last 52 weeks

By 'work' we mean any employment for which you or your partner get paid or get other advantages for, such as free or subsidised board, payments in kind, or drawings from a business.

Tell us about your current work

25

Are you working?

No

Go to question 29

Yes

HOW TO ANSWER Q26:

By full-time, we mean you generally work at least 30 hours a week.

26

What type of work do you do?

Full-time

Part-time

Casual

Seasonal

Self-employed

Voluntary

INFORMATION FOR Q26:

If you have more than one job please record details of your other employers on a separate sheet of paper.

27

Who are you working for?

Employer's name

Employer's contact details

Address	
Phone number	Fax ()
Email	

HOW TO ANSWER Q28:

Include the amount you're paid and also the value of things you get from your employer instead of money.

If your income varies week to week - provide an average (for example the average of your last four weeks pay).

28

How much are you paid each week?

	Type of payment (Include goods or services)	Amount before tax	Amount after tax
1.		\$	\$
2.		\$	\$
3.		\$	\$
4.		\$	\$

INFORMATION FOR Q29:

Paid Parental Leave is paid to eligible parents to care for their newborn or newly adopted child. It's paid by Inland Revenue.

You may get Best Start tax credits when the Paid Parental Leave ends.

29

Have you applied, or will you apply, for Paid Parental Leave?

No

Go to question 30

Yes

Please write the details below

Which child is it for?

How much is it each week?

What date will it end?

<input type="text"/>	<input type="text"/>	<input type="text"/>
Day	Month	Year

Tell us about your partner's current work

30

Is your partner working?

No **Go to question 34** Yes

HOW TO ANSWER Q31:

By full-time, we mean your partner generally work at least 30 hours a week.

31

What type of work does your partner do?

Full-time Part-time Casual
 Seasonal Self-employed Voluntary

INFORMATION FOR Q31:

If your partner has more than one job please record details of your other employers on a separate sheet of paper.

For each job include the information asked for in questions 31 to 33.

32

Who is your partner working for?

Employer's name

Employer's contact details

Address		
Phone number	()	Fax ()
Email		

HOW TO ANSWER Q33:

Include the amount your partner's paid and also the value of things they get from their employer instead of money.

If their income varies week to week – provide an average (for example the average of their last four weeks pay).

33

How much is your partner paid each week?

	Type of payment (include goods or services)	Amount before tax	Amount after tax
1.		\$	\$
2.		\$	\$
3.		\$	\$
4.		\$	\$

INFORMATION FOR Q34:

Paid Parental Leave is paid to eligible parents to care for their newborn or newly adopted child. It's paid by Inland Revenue.

Your partner may get Best Start tax credits when the Paid Parental Leave ends.

34

Has your partner applied, or will they apply, for Paid Parental Leave?

No **Go to question 35** Yes **↓ Please write the details below**

Which child is it for?

How much is it each week? \$

What date will it end?

Day	Month	Year

Tell us about your income and assets

Tell us about income in the last 52 weeks?

35

Did you or your partner get income from any of the following sources in the last 52 weeks?

- Wages or salary No Yes
- Termination pay No Yes
- Redundancy pay No Yes
- Accident compensation (eg ACC) No Yes
- Income insurance (replacement/protection) No Yes
- Farm or business income No Yes
- Payments from self employment or contract work No Yes
- Interest from savings, investments, or bonds No Yes
- Dividends from shares, unit trusts, or managed funds No Yes
- Income from rents No Yes
- Payments from three or more boarders or flatmates No Yes
- Child Support payments No Yes
- Other income for a child No Yes
- Maintenance payments No Yes
- Payments from a former partner No Yes
- Student Allowance, scholarship, or Student Loan living cost payments No Yes
- Overseas pension, benefit or allowance payments No Yes
- Other superannuation or retirement scheme income – government or private (don't include NZ Super or Veteran's Pensions because we already know what you get) No Yes
- Income from an estate, if you've inherited money No Yes
- Income from trusts No Yes
- Other No Yes

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ATTACHMENT FOR Q35:
Bring a copy of your business accounts.

INFORMATION FOR Q35:
In this application form, 'partner' means the person you're married to or in a civil union or relationship with, not a business partner.

36

Did you answer 'yes' to any of the sources of income listed in question 35?

- No Yes

↓ Tell us the total before-tax amounts, for the last 52 weeks

Where did the income come from?	Payment made to?		
	You	Your partner	Jointly with your partner
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

ATTACHMENT FOR Q36:
You need to show us proof of income you've received in the last 52 weeks.

HOW TO ANSWER Q37:
Other types of payment include advantages such as free or subsidised goods and services (for example, free food, subsidised accommodation).

37

Did you or your partner get other types of payment apart from money in the last 52 weeks?

No Yes

↓ Please tell us about the type of payment and its value

Type of payment	Where did it come from?	Its value
		\$
		\$
		\$

HOW TO ANSWER Q38:
How often do you expect the payment, such as weekly, fortnightly, monthly, one-off.
The types of income you need to include here are listed on page 11.

38

Do you or your partner expect to get income or other payments in the next 52 weeks?

No Yes

↓ Please write the details below. Tell us the before-tax amounts

Where will the payment come from?	Payment made to?			How often do you expect the payment?
	You	Your partner	Jointly with partner	
	\$	\$	\$	
	\$	\$	\$	
	\$	\$	\$	

Tell us about your assets

ATTACHMENT FOR Q39:
You may be asked to provide proof of your assets and their value.

39

Do you or your partner have any of the following cash assets?

- Money in bank or other savings No Yes
- Bonus Bonds, shares, debentures or stocks No Yes
- Money lent to other people or organisations No Yes
- Other cash assets No Yes

40

If you answered 'yes' to any of the assets listed in question 39, please write the details below.

Type of asset	You	Your partner	Jointly owned
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

HOW TO ANSWER Q41:
Examples of property you don't live in include, land, holiday homes, bach/crib, investment properties.

41

Do you or your partner have any of the following non-cash assets?

- Property you don't live in No Yes
- Boat or caravan No Yes
- Other No Yes

ATTACHMENT FOR Q42:
You may be asked to provide proof of these details.

42

If you answered 'yes' to any of the non-cash assets listed question 41, please write the details below.

Type of asset	How much is it worth?	How much do you owe on it?
	\$	\$
	\$	\$
	\$	\$

HOW TO ANSWER Q43:
Please include assets sold to a trust, family members, business or charitable organisations.

43

Have you or your partner sold any assets in the last five years?

No Yes **↓ Please provide details below**

Asset 1

What was the asset? <input type="text"/>	How much was it sold for? \$ <input type="text"/>
Who was it sold to? <input type="text"/>	When was it sold? <input type="text"/> / <input type="text"/> / <input type="text"/> Day Month Year

Asset 2

What was the asset? <input type="text"/>	How much was it sold for? \$ <input type="text"/>
Who was it sold to? <input type="text"/>	When was it sold? <input type="text"/> / <input type="text"/> / <input type="text"/> Day Month Year

Gifting assets includes giving away, transferring, or disposing of your assets to another person or organisation.

If you or your partner (even if they have died) have given assets away they may still be counted for this assessment.

You can gift up to a certain amount for each 12 month period in the five years before you apply. To find out the amount you can gift go to our website workandincome.govt.nz and search on *Residential Care Subsidy*.

INFORMATION FOR Q44:
Depending on your circumstances, we may ask you for information on assets gifted more than five years ago.

44

Have you or your partner ever gifted any assets?

No Yes **↓ Please provide details below**

Asset 1

What was the asset? <input type="text"/>	What was the asset worth? \$ <input type="text"/>
Who was it gifted to? <input type="text"/>	When was it gifted? <input type="text"/> / <input type="text"/> / <input type="text"/> Day Month Year

Asset 2

What was the asset? <input type="text"/>	What was the asset worth? \$ <input type="text"/>
Who was it gifted to? <input type="text"/>	When was it gifted? <input type="text"/> / <input type="text"/> / <input type="text"/> Day Month Year

HOW TO ANSWER Q44:
Please include assets gifted to a trust, family members, business or charitable organisations.

ATTACHMENT FOR Q44:
Please provide proof of the assets you gifted. If you can't do this you'll need to talk with us.

Are you involved with a trust?

45

Are you or your partner involved in a trust, or have you or your partner ever been involved in a trust?

The trust can be any type of trust, including a family trust.

'Involved' means one or more of the following:

- you've set up a trust, usually by making a gift of assets or property
- you've sold or gifted assets to a trust
- you make decisions about managing a trust
- you benefit from a trust; for example, by receiving free or subsidised accommodation or income such as trust distributions.

No

[Go to question 46](#)

Yes



Please write the name of the trust

ATTACHMENT FOR Q45:

You'll need to provide full copies of trust documents such as:

- trust deed
- deeds of acknowledgment of debt
- deeds of forgiveness of debt
- Inland Revenue gifting statements
- the latest trust financial statements.

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Extra Help information

You may be able to get extra financial or other help. Most extra help we pay depends on your personal situation and what income or assets you have. You can apply for extra help at any time.

For more information about extra help and application forms go to seniors.msd.govt.nz or you can phone us on **0800 552 002**.

Disability Allowance

If you, or a family member, have a disability or medical condition likely to continue for at least six months, you may be able to get help with costs such as ongoing visits to the doctor, medicines, medical alarms, travel, and some other costs.

Disability Allowance is income tested.

46

Do you want to apply for a Disability Allowance?

No

Yes

Please complete a Disability Allowance application

Accommodation Supplement

If you have costs from owning your own home, renting, or boarding, you may be able to get an Accommodation Supplement. How much you get will depend on your income, assets, accommodation costs, family circumstances and where you live.

Accommodation Supplement is income and asset tested.

If you and/or your partner are tenants living in a community housing property, you won't be able to get Accommodation Supplement. (Community housing properties are provided by Kāinga Ora (formerly Housing New Zealand) and approved community housing providers.)

47

Do you want to apply for an Accommodation Supplement?

No

Yes

Please complete an Accommodation Supplement application

Temporary Additional Support

Temporary Additional Support helps with essential costs for a short time when you've tried everything you can think of, and still can't pay for them.

To get Temporary Additional Support, your assets will need to be below a certain level.

48

Do you want to apply for Temporary Additional Support?

No

Yes

Please complete a Temporary Additional Support application

Community Services Card

The Community Services Card can help you with the costs of health care. You will pay less for some health services and prescriptions.

To be eligible for the Community Services Card, your income must be below a certain level.

49

Do you want to apply for a Community Services Card?

No

Yes

Please complete a Community Services Card application

Dependent children in your care

A dependent child is a child who is financially supported by you and is living with you as a member of your family.

50

Do you have dependent children in your care?

No

Yes

You may be able to get other forms of financial assistance. Please ask us about this.