

Working for Families Checklist

Client Name: _____

Tax Year: _____

Accountant: _____

Full Name: _____

IRD Number: _____

Spouse/Partner's Full Name: _____

Spouse/Partner's IRD Number: _____

Dependent Children Details:

Full Name(s), Date of Birth, and IRD Number(s) of all children under 18.

Name:	DOB:	IRD #:
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Please confirm:

- Has there been any changes in family circumstances, including, changes in marital status, new dependents or children leaving school or changes in income/employment status?
- Have you paid or received maintenance to/from any person during the year?
- Were you a full time wage/salary earner during the year? (20 hours per week for single parent or 30 hours per week for joint spouse)?

Shared Care Arrangements:

- Documentation for any shared custody arrangements affecting entitlements.

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There are 4 types of Working for Families tax credit payments,
Which of these do you believe you are entitled to?

Family tax credit

Paid regardless of your income source. You can be on salary and wages or receiving an income-tested benefit.

In-work tax credit

This is a payment available for families who have some income from paid work each week.

Minimum family tax credit

A payment to make sure families are getting basic income where the parents or parents work a required number of hours for salary and wages.

Best Start tax credit

A weekly payment for families supporting a newborn baby.