

Working for Families Questionnaire

Ensure this questionnaire is completed and included with your records



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|--------------|--|
| Client Name | |
| Balance Date | |

Records Required

Working for Families Tax Credits and Parental Tax Credit

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| <p>Please supply full names and birth dates of all children. Please note the following:</p> <ul style="list-style-type: none"> ▪ If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them ▪ Where a child has become financially independent during the current financial year, please advise the date they left school or home | <input type="checkbox"/> | |
|--|--------------------------|--|

| <u>Child's Name</u> | <u>IRD No.</u> | <u>Date of Birth</u> | <u>Date left School</u> |
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Working for Families Tax Credits and Parental Tax Credit

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| <p>If you have received Working for Families Tax Credits during the year, please supply the certificate issued to you by IRD, detailing the amounts.</p> | <input type="checkbox"/> | |
| <p>Also provide details of any child support or maintenance payments made or received.</p> | <input type="checkbox"/> | |
| <p>If we do not prepare your spouse or partner's taxation return, please provide us with details of their income.</p> | <input type="checkbox"/> | |
| <p>Have there been any changes to your family circumstances, including a change in responsibility for your dependent child(ren), you have married, separated or otherwise changed your family circumstances? If so, please provide details.</p> | <input type="checkbox"/> | |
| <p>Do you share custody of your child(ren) with anyone other than your partner? If so, please provide details.</p> | <input type="checkbox"/> | |
| <p>Did you work on average less than 20 hours per week if single or did you and your spouse / partner combined work less than 30 hours per week? If so, please provide details.</p> | <input type="checkbox"/> | |

