

STUDENT ALLOWANCE REASSESSMENT OF PARENTS' INCOME APPLICATION FORM

COMPLETE THIS FORM IF YOU ARE THE PARENT(S)¹ OF A STUDENT WHO HAS A PARENTALLY INCOME TESTED STUDENT ALLOWANCE, AND YOU WOULD LIKE YOUR INCOME REASSESSED.

If the student is under 24 years old without children, we test your combined² income to calculate how much they get for the Student Allowance. This applies regardless of the student's relationship status.

We can reassess your combined² income if it has dropped by at least 25% since the last time it was assessed.

You can't apply for a reassessment of your income if the student's application for Student Allowance is declined because your income was above the limit. If this is the case you need to complete a new Parents' form instead, and provide evidence of your reduced income. You should do this as soon as possible; in most cases the Student Allowance will only be approved from the date we receive your new information.

If either parent wishes to keep their details confidential they can each complete a separate form and send it to us.

If you need a Parents' form or another application for reassessment of your income, you can download one from our website www.studylink.govt.nz.

- 1 A parent is a natural, adoptive or whāngai parent, a guardian, caregiver, step-parent, partner of a parent or any other person acting as a parent who is responsible for the student's well-being and financial support.
- 2 If you are the student's only parent, and we have approved a One Parent application for the student, we will calculate the student's entitlement based on your income only.

If only one parent's income has reduced both parents must still complete this form.



BEFORE YOU START – READ THIS PAGE

HERE ARE SOME IMPORTANT THINGS YOU NEED TO KNOW BEFORE YOU COMPLETE THIS FORM.

USE BLUE OR BLACK INK ONLY

When completing your application you must only use blue or black ink. If your application is completed in any other colour we might get you to complete another one.

ANSWER ALL THE QUESTIONS

You need to answer every question in your application. If a question doesn't apply to you, use 'N/A' or 'nil'. Don't leave the space blank as this could delay the process and the student may not get paid on time.



YOU MAY NEED TO PROVIDE DOCUMENTS

You may need to provide certain documents as part of your application – these are listed on page 9 of this form.

If you're providing a copy of an original document it needs to be verified. A **verified copy** is a copy of the original document which has been signed and dated by someone like a StudyLink or Work and Income staff member, officer of a tertiary education provider, school principal, Solicitor/Lawyer, Notary Public, Court Registrar or Justice of the Peace (listed in the Yellow Pages) who can confirm that the copy is the same as the original. They must print their name and title on the copy and write that it is a true copy and sign it.

If you send an original document, we will return it to you by courier.



SIGN AND DATE THE FORM

Remember to sign and date this form.

WHERE TO SEND THIS FORM

Send your completed form (and any documents we need to see) to:

StudyLink
FreePost 207116
PO Box 30300
Lower Hutt 5040

It's important that you apply for the reassessment as soon as possible so that the student gets the correct payments.

OFFICE USE ONLY

Processed by	Checked by	Decision
		<input type="checkbox"/> Approved
Signature	Signature	<input type="checkbox"/> Declined
		<input type="checkbox"/> Pending
Date	Date	Date

Comments	Certified by
	Signature
	Date

1. Whose Student Allowance is this reassessment for?

This form can be used for more than one student. Each student must have a Student Allowance.

Student's full name	Date of birth	What is their client number (if known)?	Will the student be living with a parent while they are studying? Yes / No
	/ /		
	/ /		
	/ /		
	/ /		
	/ /		

2. What is your legal name?

This is your legal name as appears on your Passport or Birth Certificate.

First parent

First name	Middle name(s)	Surname or family name

Second parent

First name	Middle name(s)	Surname or family name

We need to know if you are living in separate households while the student is studying. If you are, we'll disregard \$3,400 of your joint income.

3. What is your street address?

By street address we mean a physical address. We need this information to determine if you are living in separate households. By separate households we mean living at different addresses for the majority of the week. Separate households do not include addresses used for holiday periods. You need to let us know if this changes.

First parent

Flat/House no.	Street address	
Suburb	City	Country

Second parent (if living at a different address)

Flat/House no.	Street address	
Suburb	City	Country

3a. What New Zealand address do you want your mail sent to (if different from the above address)?

We need a New Zealand address, even if you live overseas. If you don't live with the student and want to use their address, please include C/O in front of the address.

First parent

Postal address		
Suburb	City	Country
		NEW ZEALAND

Second parent

Postal address		
Suburb	City	Country
		NEW ZEALAND

4. How can we contact you?

First parent

Phone	Mobile	Fax	Email

Second parent

Phone	Mobile	Fax	Email

5. Why has your income dropped?

6. When did the drop in income happen?

Note: a reassessment of your income cannot be completed for an anticipated drop in income.

<input type="text"/>	<input type="text"/>	Day	<input type="text"/>	<input type="text"/>	Month	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Year
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WE NEED TO SEE EVIDENCE OF THE DATE YOUR INCOME DROPPED – FOR EXAMPLE, AN ORIGINAL OR VERIFIED COPY OF A LETTER FROM YOUR EMPLOYER OR STATEMENT FROM YOUR ACCOUNTANT.

OFFICE USE ONLY

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TELL US ABOUT YOUR INCOME

For more information, including examples on each of these income types, please refer to the glossary section on our website.

7. Now that your income has dropped, are you receiving a Work and Income Benefit?

We don't need to see evidence of your Work and Income benefit.

First parent

<input type="checkbox"/> Yes	<input type="checkbox"/> No
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Second parent

<input type="checkbox"/> Yes	<input type="checkbox"/> No
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If Yes, what is your client number?

This is a number issued to you by StudyLink or Work and Income. This is on your Community Services Card if you have one. If you don't have a client number or don't know it, leave this question blank.

First parent

--	--	--	--	--	--	--	--	--

Second parent

--	--	--	--	--	--	--	--	--

8. Now that your income has dropped, do you receive any income from wages or salary?

Including paid parental leave payments, weekly accident insurance payments, and overseas wages and salaries, please state this in \$NZ.

First parent☐

Yes

☐

No

Second parent☐

Yes

☐

No

If Yes, please give us the gross amount.

First parent

\$

Second parent

\$

9. Do you receive any business income?

This is income earned from goods and services you sell, less the business expenses. (If you operate your business via a Company or Trust, do not include the income here; include it under the 'other income' section)

First parent☐

Yes

☐

No

Second parent☐

Yes

☐

No

If Yes, please give us the amount.

Note: Losses incurred or brought forward cannot be used to reduce other income. Write 'NIL' if there were losses

First parent

\$

Second parent

\$

10. Do you receive any other income?

(For more information, including examples, on each of these income types, please refer to the glossary section on our website.)

Other income could include interest, dividends, rents, other payments that exceed \$5,000 a year, tax exempt income, Pensions and Annuities, Attributable trustee income, Attributable fringe benefits, PIE income, Income equalisation scheme deposits (excludes 'adverse events' deposits), distributions from superannuation and retirement savings schemes, overseas pensions, income held in a closely held company.

First parent☐

Yes

☐

No

Second parent☐

Yes

☐

No

If Yes, please use the worksheet on page 8 to calculate the amount and type of each 'other income' you have and give the total figure below.

First parent

\$

Second parent

\$

WE NEED TO SEE EVIDENCE OF YOUR INCOME – FOR EXAMPLE, AN ORIGINAL OR VERIFIED COPY OF RECENT PAYSLEIPS (YOU NEED TO PROVIDE AT LEAST FOUR WEEKS OF INCOME), A LETTER OR STATEMENT FROM YOUR EMPLOYER(S), INLAND REVENUE OR A TAX ASSESSMENT NOTICE OF THE COUNTRY OR COUNTRIES YOU RECEIVED INCOME FROM STATING YOUR INCOME BEFORE TAX, A LETTER FROM YOUR BANK(S), SOCIAL SECURITY OR PENSION PROVIDER, OR ANY OTHER ORGANISATION YOU GET INCOME FROM. IF YOUR INCOME HASN'T CHANGED SINCE THE LAST COMPLETE FINANCIAL YEAR YOU CAN PROVIDE EVIDENCE OF THIS INCOME.

11. While supporting the student(s) named in Question 1, will you be supporting any other full-time students 16-23 years old?

The other students must be aged at least 16 years old on 31 December in the year prior to the application and not older than 23 years old on 1 January in the year of the application.

☐ Yes

☐ No (Go to the 'Parents' Declaration' on the next page)

If Yes, please give us their details:

Student's full name	Date of birth	Which education provider are they with?	OFFICE USE ONLY
	/ /		
	/ /		
	/ /		
	/ /		

 **WE NEED TO SEE ORIGINAL OR VERIFIED COPIES OF THE STUDENTS' BIRTH CERTIFICATES OR PASSPORTS (UNLESS STUDYLINK HAS ALREADY SEEN THEM).**

PRIVACY STATEMENT

The legislation administered by the Ministry of Social Development allows us to check the information that you give us in this form.

The Privacy Act 1993 requires us to tell you that:

- The information you give us is collected under the authority of the legislation administered by the Ministry of Social Development.
- The information will be held by the Ministry of Social Development.
- The information is collected for the purposes of the legislation administered by the Ministry of Social Development (including StudyLink, Work and Income, Child Youth and Family and other service lines of the Ministry), and in particular for:
 - granting financial assistance and other assistance under the Social Security Act 1964 and Education Act 1989 (and any Regulations under those Acts)
 - statistical and research purposes
 - providing advice to Government
 - care and protection needs of children
 - providing support and services to you and your family
 - providing education related services
 - providing employment related services.
- The information you give us may be compared with information held by Inland Revenue, the Ministry of Justice, the Department of Corrections, the New Zealand Customs Service, the Department of Internal Affairs, the Accident Compensation Corporation, Housing New Zealand, Statistics New Zealand, the Ministry of Health, Immigration New Zealand, the Ministry of Education, the New Zealand Qualifications Authority, the Tertiary Education Commission, Student Job Search and education providers. It may also be compared with social security information (for example, pension or benefit information) held by other governments (including Australia and the Netherlands).
- Under the Tax Administration Act 1994, if you have dependent children, the information you give us may be shared with Inland Revenue for the purpose of administering Working for Families Tax Credits.

Inland Revenue may also:

- use the information for the purposes of child support, Student Loans and taxation
- disclose it to the Department of Labour, Statistics New Zealand, the Ministry of Justice, the Accident Compensation Corporation, and the Ministry of Education
- disclose your personal information to your partner.
- Under the Privacy Act 1993 you have the right to ask to see all information we hold about you, and to ask us to correct that information.
- You are not required to give us information; but if you do not give us all the information we ask for, the student's application for financial assistance may be declined.



SIGN HERE

PARENTS' DECLARATION

The information I have provided is true and I have not left anything out. I understand I may be asked to provide further evidence to support the income details I have given and that I could be prosecuted if I make a false statement.

First parent's signature

SIGN HERE

Day

Month

Year

Second parent's signature

SIGN HERE

Day

Month

Year

OTHER INCOME WORKSHEET

Use this worksheet to calculate the amount and type of each 'other income' you have. **You only need to complete the categories that you have income for.**

For more information, including examples, on each of these income types please refer to the glossary section on our website. Once you have completed this worksheet please put the total figure into the 'other income' box on page 5.

Note: Losses incurred or brought forward cannot be used to reduce other income. Write 'NIL' if there were losses

	First Parent	Second Parent
Interest This includes money you earn from an interest bearing bank account.	\$	\$
Dividends Dividends are part of a company's profits that it passes on to its shareholders. Unit trusts are treated as companies for income tax purposes and unit trust distributions are treated as dividends.	\$	\$
Rents or income from boarders This includes rental income received from renting out property.	\$	\$
Other payments that exceed \$5,000 a year These are payments from any other person or entities that are used for the family's day-to-day living expenses.	\$	\$
Tax exempt income This includes salary and wages that are exempt from income tax under specific international agreements in New Zealand. It includes employees of international organisations such as the United Nations or the Organisation for Economic Co-operation and Development (OECD), or under the Diplomatic Privileges and Immunities Act 1968.	\$	\$
Pensions and Annuities This includes overseas pensions (please state this in NZ\$), 50% of the amount of any pension or annuity payments from life insurance policies or superannuation fund (excluding NZ Super), distributions from superannuation and retirement savings schemes etc (taxable or not).	\$	\$
Attributable Trustee Income Attributable trustee income is all income for the year of a trust that hasn't been distributed as beneficiary income.	\$	\$
Attributable fringe benefits The value of any attributable fringe benefits is required to be declared by all shareholder employees if they, or their associates, hold voting interest of 50% or more in a company.	\$	\$
PIE income This includes an amount of income attributed by a portfolio investment entity (PIE) to the principal caregiver or their spouse or partner, except if the PIE is a superannuation fund or a retirement savings scheme (e.g. KiwiSaver).	\$	\$
Income equalisation scheme deposits (excludes 'adverse events' deposits) This includes any deposits made by you, your trust or a company controlled by you to an agricultural, fishing or forestry business income equalisation scheme at Inland Revenue.	\$	\$
Income held in a closely held company	\$	\$
Total Please put the total income figures from these boxes into the other income box on page 5 of the form.	\$	\$



PARENTS' CHECKLIST

DOCUMENTS TO PROVIDE

If you're providing a copy of an original document it needs to be verified. A **verified copy** is a copy of the original document which has been signed and dated by someone like a StudyLink or Work and Income staff member, officer of a tertiary education provider, school principal, Solicitor/Lawyer, Notary Public, Court Registrar or Justice of the Peace (listed in the Yellow Pages) who can confirm that the copy is the same as the original. They must print their name and title on the copy and write that it is a true copy and sign it. If you send an original document, we will return it to you by courier.

You need to provide any information we need before the end of the student's course or their Student Allowance application may be declined.

- ☐ Evidence of the date your income dropped. For example, a letter from your employer or statement from your accountant.
- ☐ Evidence of any income you're getting now. For example, four weeks of payslips, a letter or statement from your employer(s), Inland Revenue or a tax assessment notice or letter from the tax department of the country or countries you get income from, or a letter or statement from your bank(s), social security or pension provider, or any other organisation you get income from.
- ☐ Birth certificates or passports for other full-time students. You won't need to provide these if StudyLink has already seen them.

If your child is approved a Student Allowance and you're receiving child support or Working for Families Tax Credits for them, you need to contact Inland Revenue straight away as your entitlement will be affected. You can contact Child Support on 0800 221 221 and Working for Families Tax Credits on 0800 227 773.

MyStudyLink – get it all done online

- apply for student finances
- check Student Allowance and Student Loan application status
- view and update personal details
- check Student Loan balances, change living cost payments and apply for course-related costs
- view next payment details and previous transactions
- view mail online
- view and accept a Student Loan Contract.

www.studylink.govt.nz

HOW TO CONTACT US

Website: **www.studylink.govt.nz**

Phone: **0800 88 99 00**

Fax: **0800 88 33 88**

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