

Client number 507 566 280
Nerys Thamm

Student Allowance – Parents' form

To complete your application for a Student Allowance, we need some more information from your parents. For the full definition of parent for Student Allowance applications, please see the Information for Parents section at the end of this form..

If you have only one parent, that parent will need to complete a One Parent application form instead. You can download one from our website www.studylink.govt.nz.

Please ask your parents to:

- **check** the information on this form is correct. If anything is not correct or has changed, please amend this form and initial the change;
- **provide** any evidence we ask for, and complete the 'Parental Income Worksheet' if required,
- **sign** the form

We recommend that you return this form to us online using www.connect.co.nz.

If either parent wishes to keep their details confidential they can each complete a separate form and send it to us. If you need another form, you can download one from our website.

PART 1: PARENTS' DETAILS

FIRST PARENT

WHAT IS YOUR LEGAL NAME? (This is your legal name as it appears on your Passport or Birth Certificate)

First name(s)

Julia

Family name

Stanton-Jones

What is your relationship to the student?

Will the student be living with you while they are studying?

☐

Yes

☐

No

If no, what is your street address?

By street address we mean a physical 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.

What New Zealand address do you want your mail sent to (if different from your street address)?

We need a New Zealand address, even if you live overseas. If you want to use the student's address, please include C/O in front of the address.

How can we contact you?

Phone

Mobile

Fax

Email

OFFICE USE ONLY

Signed and Dated

Y

Q

☐☐

Fields Altered

☐

Evidence

☐

Docs to StudyLink

☐

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SECOND PARENT

WHAT IS YOUR LEGAL NAME? (This is your legal name as it appears on your Passport or Birth Certificate)

First name(s)

Joerg

Family name

Thamm

What is your relationship to the student?

Will the student be living with you while they are studying?

☐

Yes

☐

No

If no, what is your street address (if different from first parent)?

By street address we mean a physical 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.

35c Totara Street

MOUNT MAUNGANUI 3116

What New Zealand address do you want your mail sent to (if different from your street address)?

We need a New Zealand address, even if you live overseas. If you want to use the student's address, please include C/O in front of the address.

How can we contact you (if different from above first parent)?

Phone

Mobile

Fax

Email

ARE YOU OR HAVE YOU BEEN PAID AN ORPHAN'S BENEFIT, UNSUPPORTED CHILD'S BENEFIT OR A FOSTER CARE ALLOWANCE FOR THE STUDENT?

First Parent

☐

Yes

☐

No

Second Parent

☐

Yes

☐

No

DO YOU, OR HAVE YOU HAD A TRANSITIONAL SUPPORT LIVING ARRANGEMENT THROUGH ORANGA TAMARIKI FOR THE STUDENT?

First Parent

☐

Yes

☐

No

Second Parent

☐

Yes

☐

No

WHILE SUPPORTING THE STUDENT, WILL YOU BE SUPPORTING ANY OTHER FULL-TIME DEPENDENT STUDENTS AGED 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 application.

☐

Yes

☐

No

If yes, please give us their details.

Student's Full name

Date of birth

Which education provider are they with?

We need to see original or verified copies of the student's birth certificate or passports (unless StudyLink has already seen them).



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PART 2: TELL US ABOUT YOUR INCOME

ARE YOU CURRENTLY RECEIVING A WORK AND INCOME BENEFIT, NEW ZEALAND SUPERANNUATION OR STUDENT ALLOWANCE?

We don't need to see evidence of these payments.

First Parent

☐ Yes ☐ No

Second Parent

☐ Yes ☐ No

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

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Second Parent

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

WHAT IS YOUR CURRENT ANNUAL GROSS INCOME?

Please provide us with your current annual gross income from all sources. If your income has not changed since the last complete tax year, we can accept those details as your current income.

Please state what tax year your income declaration is for:

From

--	--

 Day

--	--

 Month

--	--	--	--

 Year

To

--	--

 Day

--	--

 Month

--	--	--	--

 Year

All income amounts (including all foreign sourced income) must be in New Zealand Dollars (NZ\$).

Please tell us about all of your sources of income. Where the following table is completed by your accountant or tax agent and they have provided their details and signed the declaration page, evidence is not required.

If you are completing the table yourself we require evidence to support your declarations.

Note: Losses are generally treated as NIL income and cannot be offset against other income sources. Where a loss has been incurred please write "LOSS" in the appropriate field in the income source table below and complete the 'Income offsets' section in this form.

Please refer to the 'Information for Parents' at the back of this form for more information about the below income sources.

Income source table	First parent	Second parent
Salary and wages Any gross yearly salary/wages from an employer, including overtime and other taxable allowances.	\$	\$
Ministry of Social Development payments This includes any main benefits (for example, Jobseeker Support, Sole Parent Support, Supported Living Payments), Student Allowance or New Zealand Superannuation.	\$	\$
Shareholder salaries Any gross salary payments received from a company you have shareholdings in.	\$	\$
Interest Gross interest earned from any source.	\$	\$
Dividends Distributions received from a private or publicly listed company.	\$	\$
Accident compensation The amount you receive from Accident Compensation Corporation (ACC), a private insurer or employer (this does not include compensation for a loss other than a loss of income or any lump sum compensation under the Accident Compensation Act 2001).	\$	\$



Net rental income All gross profit made from all rental properties you own, less expenses incurred.	\$	\$
Business net income (sole trader) All gross income received by the business, less all expenses incurred.	\$	\$
Partnership net income Your proportion of gross income received by the partnership, less all expenses incurred by the partnership.	\$	\$
Income of major shareholder held in a closely held company The greater of either zero or the amount calculated using the following formula: (persons (parent's) interest + attributed interest) x (income-dividends)	\$	\$
Director fees Fees distributed from a company to a director for services performed.	\$	\$
Trust beneficiary income All income distributed from a trust to a beneficiary.	\$	\$
Attributable trustee income (settlers only) All income for the year of a trust that has not been distributed as beneficiary income.	\$	\$
Trustee fees All fees distributed from a trust to a trustee for services performed.	\$	\$
Personal drawings Any payments withdrawn from any entity for personal use in addition to the salary and profit. This excludes any payments that are from a parent's capital ownership of an investment activity or business that are: <ul style="list-style-type: none"> • not payments by a trustee and • are received on capital account and • not a loan. 	\$	\$
Other payments that exceed \$5,000.00 Payments received from any other source and used for your family's usual living expenses or to replace loss or diminished income.	\$	\$
Income from boarders Taxable income from boarders as defined by Inland Revenue.	\$	\$
Tax exempt income Salary and wages exempt from income under specific agreements in New Zealand.	\$	\$
Pensions and annuities, distributions from superannuation/retirement savings schemes The full amount of any overseas pensions (taxable and non-taxable) and 50% of the amount of any New Zealand pension or annuity payments from life insurance or distributions from a private superannuation fund/retirement savings schemes (not including New Zealand Superannuation).	\$	\$
Attributable fringe benefits Fringe benefits provided by a company you hold voting interest of 50% or more and/or market value interests of 50% or more (if market value circumstances exist).	\$	\$
Salary exchanged for private use of an employer-provided motor vehicle The amount of the reduction in your salary when agreeing to a lower salary in exchange for use of a company motor vehicle.	\$	\$



Employer provided short-term charge facilities The amount of short-term charge facilities where it is not already included in your taxable income.	\$	\$
Portfolio Investment Entity income (PIE) Includes taxable and non-taxable income attributed by a Portfolio Investment Entity	\$	\$
Income equalisation scheme deposits Includes any deposits made to Inland Revenue as a part of an income equalisation scheme and any interest earned on those deposits. Withdrawals from certain schemes are not considered income.	\$	\$
Income equalisation scheme withdrawals Includes any withdrawals from adverse events income equalisation schemes and forest thinning operations income equalisation scheme. Deposits to these schemes are not considered income.	\$	\$
Other sources of income If there are any further income sources not included above (i.e. non-NZ tax resident overseas taxable income) please state here. This includes where you might have directly or indirectly deprived yourselves of income (which would result in the student getting a Student Allowance or payment at a higher rate).	\$	\$
TOTAL INCOME: The total of ALL income in this Income source table	\$	\$

Income offsets
For Student Allowance parental income purposes, offset of losses between entities generally cannot occur. Where any offsets have occurred as part of calculations above, please explain why this is allowable under section MB 3(3) of the Income Tax Act 2007.



HOW WE PROTECT YOUR PRIVACY

Collecting your information

We collect your personal information so we can provide income support, NZ Super or Veteran's Pension, Student Allowance, or Loans and connect you with employment, education and housing services. We do this under various Act, which are all listed on our website at workandincome.govt.nz/privacy

- To help us do this, we collect information about your identity, your relevant history, and your eligibility for our services.
- We get this information directly from you, and we sometimes collect information about you from others, including other government agencies.
- You can choose not to give us your information, but we might not be able to help you if you don't.

Using your information

We use the information you give us to make decisions about the best way to help you.

- These decisions may be about:
 - whether you're eligible for our services
 - running our operations and ensuring our services are effective
 - the services we'll provide in the future.

Sharing your information

Sometimes, we need to share your information outside our Ministry to reach our goal of helping New Zealanders to be safe, strong, and independent.

- To do this we may share your information with:
 - prospective employers to help you find work
 - contracted service providers that help us to help you
 - health providers if we need your medical information to assess your eligibility
 - other government agencies when we have an agreement with them
 - some other governments if you may be eligible to get or are getting an overseas pension
- We also share personal information when the law says we have to.

Respecting you and your information

We make sure we follow the Privacy Act to do what's right when we use your information.

- We treat you and your information with respect, by acting responsibly and being ethical.
- We make sure any technology we use meets strict security standards so it keeps your information safe.

Get in touch if you have a question

You have a right to ask to see your personal information, and to ask for it to be corrected if it's wrong.

- If you have a question or a complaint, please get in touch.
- You can find full details about what we do with personal information in our privacy notice at: [workandincome.govt.nz/ privacy](https://workandincome.govt.nz/privacy)



PART 3: DECLARATION

Parents' declaration

The information I have provided is true and I have not left anything out. I understand that 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

Signature

Date

Second parent

Signature

Date

First parent accountant details

☐

Please tick this box if you give permission for StudyLink to contact your accountant/tax agent if we have any further questions or require further evidence.

Please confirm your accountant/tax agent details below:

First name	Surname or family name	Business name (if applicable)
Phone	Email	

Second parent accountant details

☐

Please tick this box if you give permission for StudyLink to contact your accountant/tax agent if we have any further questions or require further evidence.

Please confirm your accountant/tax agent details below:

First name	Surname or family name	Business name (if applicable)
Phone	Email	

Declaration for Accountant/Tax Agent

If you have completed/provided the income information on this form and you are the accountant/tax agent of the parent/s, please provide your details and sign below.

First name	Surname or family name	Business name (if applicable)
Phone	Email	

Signature

Date

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.

If your child is approved a Student Allowance and you're receiving any assistance from Work and Income, you need to contact them straight away as your entitlement may be affected. You can contact Work and Income on 0800 559 009.



Client number 507 566 280
Nerys Thamm



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Information for Parents

Definition of a parent

A parent includes a natural or adoptive parent, step-parent¹ or partner of a parent, some caregivers, and any other person acting in place of a parent² who is financially responsible for the student.

Caregivers who are not parents

A person (including their spouse or partner) who is, or has been, a caregiver of a student is not considered a parent if they:

- are receiving or have received a Foster Care Allowance, Orphan's Benefit or Unsupported Child's Benefit for the student, or
- are providing or have provided a transition support living arrangement through Oranga Tamariki for the student.

¹ A step-parent or partner is a person who is married to, or in a civil union or de facto relationship with, the parent of the student.

² A person acting in place of a parent can include grandparents, other relatives (including whangai), and some current and former caregivers and legal guardians of the student.

Income Information

For more information on Parental income, please refer to 'Parent's income – Student Allowance definition' in the glossary section on the StudyLink website: www.studylink.govt.nz

Offsetting income losses – MB 3 of Income Tax Act 2007

For Student Allowance parental income purposes, where a loss has occurred, it is generally regarded as nil income: an exception does exist to this rule. Where a parent has multiple business or investment activities of a kind that are normally associated with each other, a loss from one activity may be able to be offset against the profit from the other activity.

Ministry of Social Development payments

This is the gross amount of any income from a main benefit that you receive from Work and Income, New Zealand Superannuation or from a Student Allowance.

Note: A main benefit includes, Jobseeker Support, Sole Parent Support, Supported Living Payments, Emergency Benefit, Youth Payment and Young Parent Payment. Any supplementary assistance you receive (e.g. Accommodation Supplement) is not included as income.

Salary/wages

This is the total amount of any salary or wages (taxable or non-taxable) you are paid by an employer. This includes paid parental leave and overseas salary and wages. This does not include non-taxable allowances or any wages you draw from a business, partnership or company you operate.

Shareholder salaries

This is the gross salary or remuneration distributed from a company to a shareholder for services performed. This is paid before the final net profit is determined. This is listed as an expense from the company.

Interest

Gross interest earned from any source. This includes any money earned from an interest bearing bank account or term deposit.

Dividends

Dividends are part of a company's profit that is passed on to its shareholders. These are paid to shareholders according to the proportion of the company they own. Unit trusts are treated as companies for tax purposes and unit trust distributions are treated as dividends.

Accident compensation

Any on-going gross payments paid to you as a result of an accident/injury. This does not include compensation for a loss other than for a loss of income or any lump sum compensation under the Accident Compensation Act 2001.



Net rental income

This is the net income (gross income less expenses) made from all rental properties that you own. Income from rental properties that are part of a business or trust must be included in any business or trust income declared.

Business net income (Sole Trader)

This is the gross amount of any income that is received as a result of business activity less all expenses.

Partnership net income

Your proportion of net income (gross income less expenses) received by the partnership.

Director fees

All fees distributed from a company to a director for services performed.

Income of major shareholders held in a closely held company

A closely held company is a company where at any time there are five or fewer people whose voting interests in the company is more than 50% or, if market value circumstances exist for the company, there are five or fewer people whose market value interest in the company is more than 50%.

If a parent is a major shareholder in a closely held company, the income is the greater of either zero or the amount calculated using the following formula:

(parents' interest + attributed interest) x (income – dividends)

Attributable trustee income

(MB 7 of the Income Tax Act 2007)

All income for the year of a trust that has not been distributed as beneficiary income is income attributed to the settlors of the trust.

Generally a settlor is a person who transfers value in cash or kind to the trust for the benefit of the beneficiaries. You are also a settlor if you provide financial assistance to a trust (or for the benefit of the trust) with an obligation to pay you back on demand, and you don't ask the trust to pay you back or you defer making the request for repayment.

Trust beneficiary income

All income distributed from a trust to a beneficiary.

Trustee fees

This is any income paid to you from a trust as trustee for services performed.

Personal drawings

Any payments withdrawn from any entity for personal use in addition to the salary and profit paid to you.

Other payments exceeding \$5,000.00 a year

(MB 13 of the Income Tax Act 2007)

Payments received from any other person used for your family's usual living expenses or to replace diminished income can be considered income. These are payments that were used for something you and your family would otherwise have paid for yourselves.

Note: There are exclusions that are outlined under MB 13 (2) of the Income Tax Act 2007.

Income from boarders

The Inland Revenue website outlines what amount of any declared boarding payments are deemed to be taxable. This amount will depend on the costs incurred and payments received. Please see Inland Revenue's website for more information www.ird.govt.nz.

Tax exempt income

(MB 1(2) of the Income Tax Act 2007)

This includes salary and wages exempt from income under specific international agreements in New Zealand. It includes employees of international organisations such as the United Nations or the Organisation for Economic Cooperation and Development (OECD) or under the Diplomatic Privileges and Immunities Act 1968.



Pensions and Annuities

(MB 5, 6 and 10 of the Income Tax Act 2007)

This includes overseas pensions (state NZ\$). Also, 50% of the amount of income, pensions or annuities from a life insurance policy or private superannuation fund. This may also include certain distributions from retirement saving schemes or private superannuation schemes before the retirement age (65 years old).

Please see Inland Revenue's website for more information www.ird.govt.nz

Attributable fringe benefits

(MB 8 of the Income Tax Act 2007)

The value of any attributable fringe benefits received and the fringe benefit tax paid by the company is required to be declared by all shareholder-employees if you hold voting interest of 50% or more in a company.

Salary exchanged for private use of an employer-provided motor vehicle

(MB 7B of the Income Tax Act 2007)

From 1 April 2014, if you agreed to a lower salary in exchange for private use of a company motor vehicle, the amount of your salary reduction is treated as part of your income. If the use of the vehicle just comes with the job then do not include the value.

Employer-provided short term charge facilities

(MB 7B of the Income Tax Act 2007)

As of 1 April 2014, if your employer is providing you with a short-term charge facility that allows you to buy, hire, or charge goods or services at a discounted rate this can be treated as income. It would be considered income if the benefits are either more than 5% of your salary and wages, or \$1,200.

Portfolio Investment Entity Income (PIE)

(MB 1(5) of the Income Tax Act 2007)

This includes an amount of taxable or non-taxable income attributed by a PIE fund to you, except if the PIE fund is a 'locked-in' superannuation fund or retirement savings scheme (e.g. KiwiSaver).

Income equalisation scheme deposits

(MB 9 of the Income Tax Act 2007)

The income equalisation scheme allows you to deposit income from farming, fishing or forestry to Inland Revenue. The amount deposited into the income equalisation scheme is considered income and any interest earned on those deposits.

Withdrawals from the scheme are not considered income.

Adverse events and forest thinning operations income equalisation schemes

Withdrawals from adverse events income equalisation schemes and forest thinning operations income equalisation schemes are parental income as they are taxable.

Deposits are not parental income.

Note: Generally refunds (excluding interest) are not considered income.

