

Working for Families Checklist of Sundry Adjustments Required to be Taken into Account (to be completed by both spouses)

Name: _____ Year ended 31 March 2018

		Yes / No
1	Are you a Settlor of any Trust for which WK do not prepare accounts?	
2	If Yes, does the Trust receive any income?	
3	Do you receive any fringe benefits, other than those shown in accounts prepared by WK?	
4	If Yes, what is the nature of the fringe benefit?	
5	Do you receive any PIE income, where details have not been provided to WK? (Do not include PIE income from a Super Fund or KiwiSaver scheme.)	
6	Do any of your children (for whom you are receiving a WFF tax credit) have any income, other than employment income, in excess of \$500 per annum?	
7	Do you receive any tax exempt income?	
8	Do you receive any amounts from either a pension, super fund or an annuity (other than from NZ National Super or a lump sum withdrawal from KiwiSaver)?	
9	Have you received any amounts from any other source in excess of \$5,000 (in total) over the year?	
10	Do you have any other income not already shown in your tax returns?	
11	Do you receive an employer provided motor vehicle?	
NB - If you have answered Yes to any of the above questions your entitlement to a WFF tax credit may be reduced. We will contact you to get full details.		

Signed: _____

Dated: