

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

Name: _____ **Year ended 31 March 2024**

		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? If so, please provide details.	
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)? If so, please provide details.	
9	Have you received any amounts from any other source in excess of \$5,000 (in total) over the year? If so, please provide details.	
10	Do you have any other income not already shown in your tax returns? If so, please provide details.	
11	Do you receive an employer provided motor vehicle that is available for private use?	
	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: