



**Work and Income**  
Te Hiranga Tangata

A service of the Ministry of Social Development

***The first 2 pages of this Residential Care Subsidy Application to Review Financial Means Assessment contains information for the client. Please tear off and keep.***

## Privacy Statement

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

*This may happen when you apply for a benefit and at any time after that.*

### 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 Work and Income, Child, Youth and Family and other service lines of the Ministry), and in particular for:
  - granting benefits and other assistance under the Social Security Act 1964
  - statistical and research purposes
  - providing advice to Government
  - providing support and services for you and your family.
- 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 Corporation, Ministry of Health and Immigration New Zealand. 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 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, your application for benefits may be declined.

## Important

*If you have any questions please contact the Residential Subsidy*

Unit on ☎ 0800 999 727,

Fax ☎ 0800 999 199,

Post Residential Subsidy Unit  
Private Bag 9032  
Whangarei 0148.

### I understand that:

- if I have made a false statement, **or**
- if I have failed to answer all the questions in full, **or**
- if I do not tell Work and Income about changes in my life that might affect my Financial Means Assessment, **then**
- my subsidy or loan may be reviewed, **and**
- I may have to pay back the total amount of any overpayment that I have received, **and**
- I can apply for a review of any private contribution at any time.

## Obligations

*Changes in your living situation include:*

- marriage or separation
- entering or ending a civil union
- starting or ending a de facto relationship with someone of the same or opposite sex
- change in the number of children supported
- change in accommodation costs.

### I must tell Work and Income immediately if I:

- have a change in financial circumstances
- intend to travel overseas
- have changes to personal details (such as name, address or bank account details)
- have been granted an overseas pension
- have any other changes that may affect my Financial Means Assessment.

## What are the asset thresholds?

To be financially eligible for the Residential Care Subsidy your assets need to be equal to or below the appropriate threshold. The threshold that Work and Income will use when assessing your Financial Means Assessment depends on your personal circumstances.

- **If you are aged 65 years or older, with a partner in the community,** then Column B will automatically apply to your Financial Means Assessment, unless you choose Column A. Column B means if your partner or dependent child resides in your family home, the value of your family home is not included as an asset in the Financial Means Assessment. The value of a car or similar vehicle for your partner's personal use is also not included.

**Note:** if your partner and/or your dependent child(ren) are not living in the family home, it may be to your advantage to elect Column A.

- **If you are aged over 65 years, single, or have a partner who is also in long-term residential care,** then Column A below will apply to your Financial Means Assessment.

	Column A	Column B
1 July 2011 to 30 June 2012	\$210,000	\$115,000
1 July 2012 to 30 June 2013	\$220,000	\$125,000
1 July 2013 to 30 June 2014	\$230,000	\$135,000
1 July 2014 to 30 June 2015	\$240,000	\$145,000
1 July 2015 to 30 June 2016	\$250,000	\$155,000
1 July 2016 to 30 June 2017	\$260,000	\$165,000
1 July 2017 to 30 June 2018	\$270,000	\$175,000
1 July 2018 to 30 June 2019	\$280,000	\$185,000
1 July 2019 to 30 June 2020	\$290,000	\$195,000
1 July 2020 to 30 June 2021	\$300,000	\$205,000

**Note:** if you are aged 50–64 years, single, and have no dependent children, these asset thresholds do not apply.

## What to include ☒ with this application

Please ask the Residential Subsidy Unit staff for help if:

- you do not have any of the documents we have asked for
- you think there could be a delay in providing this information
- you would like to know about extra help.

### In all cases, for both you and your partner (if you have one):

- ☐ Bank statement(s) or printouts showing balances or transactions for each account held, for the last month.

*Internet or ATM/bank printouts must be verified by the bank.*

- ☐ Proof of all your other assets and income (include proof of interest rates where applicable to all accounts and investments).

### If applicable, for both you and your partner (if you have one):

- ☐ Certificate of pre-paid funeral trust fund or account
- ☐ A copy of your Power of Attorney (if you have one)
- ☐ Current rates demand
- ☐ Bonus Bond certificate(s) and/or term deposit certificate(s)
- ☐ Sale documents and distribution statement
- ☐ Licence to occupy documentation
- ☐ Mortgage documents
- ☐ Approved dealer valuation of your vehicle, boat, caravan or campervan
- ☐ Proof of gifting (date, amount, and who received the gift)
- ☐ Proof of your outstanding debts.

### If you and your partner (if you have one) have gifted to a family trust or other trust:

- ☐ Trust Deed
- ☐ Sale and purchase agreement(s)
- ☐ Proof of value of assets transferred
- ☐ Deed(s) of acknowledgement or forgiveness of debt
- ☐ IRD gift statements
- ☐ Latest trust accounts.

### Send your completed application form to:

**Residential Subsidy Unit, Private Bag 9032, Whangarei 0148**  
(or you can drop it off at your local Work and Income Service Centre).

If you have any questions please contact the Residential Subsidy Unit on  
**☎ 0800 999 727.**

## Partner details

**Q5 note:** A partner is your spouse (husband or wife), your civil union partner, or a person of the same or opposite sex with whom you have a de facto relationship.

**Q8 note:** If you lived in a rural area, a house number could include:

- RAPID number
- fire number
- emergency services number.

### 5. Do you have a partner?

☐ No ▶ Are you: ☐ Single ☐ Living apart/ separated ☐ Divorced  
☐ Widowed ☐ Civil union dissolved  
▶ Go to Question 12

☐ Yes ▶ Are you: ☐ Married ☐ In a civil union ☐ In a relationship

### 6. What is your partner's name?

First name(s) Surname or family name

### 7. What is your partner's date of birth?

Day Month Year

### 8. Where does your partner live?

Flat/house no. Street name

Suburb City

### 9. How can we contact your partner?

Work phone Home phone Mobile phone

Email Fax

### 10. Is your partner receiving a benefit/pension?

☐ No ▶ Go to Question 14  
☐ Yes ▶ What type of benefit/pension?

### 11. What is your partner's client number?

### 12. Has your relationship status changed from your last financial means assessment?

☐ No ▶ Go to Question 19 ☐ Yes

### 13. What date did your relationship status change?

Day Month Year

## Living situation

We need to know if your partner is living alone so we can pay them the right rate.

### 14. Does your partner live alone?

☐ No ☐ Yes ▶ Go to Question 16

**Q15 note:** We don't need to know the name of each person.

### 15. Please provide details for anyone living with your partner:

	Relationship to them (eg grandchild, etc)	Date of birth	Does this person attend school or a tertiary institution?
1.	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>
4.	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>

## Living situation – continued

**Q16 note:** A visitor is someone who does not normally live with your partner.

**Q17 note:** 'Self-contained' means there is a kitchen or kitchenette and a bathroom.

### 16. Do they have visitor(s) aged 18 years or older who will be staying with them for 13 weeks or longer?

- ☐ No ► If your partner has a visitor(s) staying with them for less than 13 weeks in any 26 week period they may be eligible for the Living Alone Payment.
- ☐ Yes

### 17. What is your partner's accommodation?

- ☐ House or flat ☐ A room in a boarding house
- ☐ Self-contained 'granny' flat ☐ Hotel or motel
- ☐ Self-contained unit in a retirement village or rest home ☐ Boat moored within New Zealand territorial waters
- ☐ Accommodation in a caravan park
- ☐ Other ► Please provide details below:

## Asset threshold

**Q18 note:** For more information on asset threshold limits, see the tear out client information on page 2 of this application form.

### 18. Which asset threshold would you like to be assessed under?

Please tick one of the boxes below to indicate your choice:

- ☐ **Column A** If you choose this higher asset limit, the value of your house and car (if you have one) **are** included in the Financial Means Assessment.
- ☐ **Column B** If you choose this lower asset limit, the value of your house and car (if you have one) **are not** included in the Financial Means Assessment.

You and/or your partner need to own the house and your partner or a dependent child must be living in the house.

## Client's representative's details

**Q19 note:** A representative acting on your behalf includes:

- Enduring Power of Attorney in relation to property
- Power of Attorney
- Court appointed representative
- Authorised agent to act on your behalf in your dealings with Work and Income.



You will need to provide a copy of your Power of Attorney or Court document.

**Q20 note:** The SuperGold Card entitles you to discounts from participating businesses and gives easy access to concession on government and local authority services.

**Q21 note:** You do not have to provide this information, but it will help us if we need to contact someone about this form.

### 19. Do you have someone acting as a representative on your behalf?

- ☐ No ► Privacy laws prohibit Work and Income discussing your application details with anyone other than yourself or someone authorised to act on your behalf with Work and Income. Please talk to us if you need to appoint an agent.
- ☐ Yes ► Please provide details below:

First name(s)

Surname or family name

Address

Home phone

Mobile phone

Alternative phone

Email

Fax

### 20. Would you like to receive information by email from us, including details about discounts for SuperGold Card holders?


- ☐ No ☐ Yes ► This service is voluntary and you can withdraw from it at any time. We will never provide your details to an unauthorised third party.


### 21. What is your relationship to the representative?


## Home ownership details

**Q22 note:** Owning your own home includes:

- apartment
- studio unit
- cottage
- Licence to Occupy.

 If YES, please provide details and attach proof of rent received and outgoings paid on the property, (eg land and water rates, house insurance etc).

 Please attach a current rates demand that shows the capital value, legal description and certificate of title number.

 Please attach a current rates demand or notice of valuation that shows the capital value, legal description and certificate of title number.

22. Do you or your partner (if you have one) own your own home?

☐ No ▶ Go to Question 30 ☐ Yes ▶ Please provide details below:

Address of the home you own

23. Who will be living in your home while you are in the rest home or hospital?

24. Is the property currently rented out?

☐ No ☐ Yes

25. What is the capital value of the property?

26. Do you wish to be considered for a Residential Care Loan?

☐ No ☐ Yes ▶ We will post you an application

27. Is this property mortgaged?

☐ No ☐ Yes ▶ Please provide details below and attach a copy of your mortgage agreement and a current statement from any mortgagees showing balance(s) owed:

Name of 1st mortgagee

Amount owed

\$

Name of 2nd mortgagee

Amount owed

\$

28. Who owns the home you were living in? (eg you, you and/or your partner, a trust, family etc)

29. Have you ever owned a home?


☐ No ☐ Yes ▶ When was it sold?

Day Month Year

## Non-cash assets

**Q30 note:** Examples of non-cash assets include:

- car
- leisure boats
- caravans
- land or buildings other than your home, eg holiday homes.

 You will need to provide proof of all non-cash assets, including an LMVD valuation for your car.

30. Do you or your partner (if you have one) have any non-cash assets?

☐ No ☐ Yes ▶ Please provide details below:


Type of asset	You	Your partner	Jointly owned	Money owing
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$
	\$	\$	\$	\$

## Cash assets

**Q31 note:** Examples of cash assets include:

- money in bank or savings organisations – including cash, savings, term deposits and investments
- money lent to other people or organisations – including family trusts
- money in Bonus Bonds, shares, debentures or government stock.

Please list **all bank accounts** held by you and your partner (if you have one) otherwise we may not be able to complete your application.

 You will need to provide proof of all cash assets.

### 31. Please provide details of you and your partners (if you have one) cash assets?

Type of asset (eg ANZ Savings)	You	Your partner	Jointly owned	Interest rate
	\$	\$	\$	%
	\$	\$	\$	%
	\$	\$	\$	%
	\$	\$	\$	%
	\$	\$	\$	%
	\$	\$	\$	%
	\$	\$	\$	%
	\$	\$	\$	%
	\$	\$	\$	%
	\$	\$	\$	%

## Sold assets

### 32. Have you or your partner (if you have one) sold any assets over the last 5 years?

Please include assets sold to a trust(s), family members, business or charitable organisations.

☐ No ☐ Yes ▶ Please provide details below and attach a copy of the sale documents, including any distribution statements:

What was the asset?


When was the asset sold?  
Day Month Year

1.			
2.			
3.			

Who did you sell the asset to?

What was the asset sale price?

1.	\$
2.	\$
3.	\$

 You will need to provide proof of the sold assets. If you can't do this, please talk to us.

## Gifted assets

**Q33 note:** Allowed gifts are limited to \$6,000 per year, made in the last five years, and \$27,000 per year made more than five years prior to this application.

### 33. Have you or your partner (if you have one) ever gifted, transferred or disposed of any cash or non-cash assets **at any time**?

Please include assets gifted or transferred to a trust(s), family members, business or charitable organisations.

☐ No ☐ Yes ▶ Please provide details below and attach proof of these details:

What was the asset?


When was the asset gifted, transferred or disposed of?  
Day Month Year

1.			
2.			
3.			
4.			

Who did you gift, transfer or dispose of the asset to?

What is the asset worth?

1.	\$
2.	\$
3.	\$
4.	\$

 You will need to provide proof of the fully or partly gifted assets. If you can't do this, please talk to us.

## Trusts

### 34. Are you, or have you or your partner (if you have one), ever been involved in a trust, as a settlor, transferor, trustee or beneficiary?

- *Settlor* is a person who sets up the Trust, usually by making a gift of assets and/or property.
- *Transferor* is someone who transfers assets to a Trust.
- *Trustee* is a person who manages the Trust, and makes decisions about the distribution of income from the Trust.
- *Beneficiary* is someone who benefits from the Trust, eg by receiving income such as Trust distributions.

A person can be a settlor, transferor, trustee or a beneficiary of a Trust, a combination of these or can be all four.

☐ No ☐ Yes ▶ Please provide details below:

Trust name




You will need to provide Trust documents, eg trust deed, deed of debt, gift statements, accounts, etc.

## Estates

### 35. Are you, or have you or your partner (if you have one), ever been the beneficiary of any estate?

☐ No ☐ Yes ▶ Please provide the estate details below:




You will need to provide estate documents, eg copy of Will and latest estate accounts.

## Pre-paid funeral

### 36. Do you or your partner (if you have one) have a pre-paid funeral trust fund or account?

☐ No ▶ Go to Question 40 ☐ Yes ▶ Please provide details below:

37. What was the amount paid? You \$  Your partner \$

38. When was it paid? You     
Day Month Year  
Your partner     
Day Month Year

39. Who was it paid to? You   
Your partner

**Q37 note:** The first \$10,000 of your pre-paid funeral fund (and the first \$10,000 of your partner's pre-paid funeral fund) are exempt from the Financial Means Assessment.

**Q38 note:** Please provide proof of the value of any pre-paid funeral trust fund or account.

## Outstanding debts

### 40. What outstanding debts do you have?

Type of debt	Money owing
1.	\$
2.	\$
3.	\$



You will need to provide proof of those debts if they are more than \$500.




# Income

**Q41 note:** Examples of money from other sources include:

- interest from savings or investments
- dividends from shares
- private superannuation
- any pensions
- payment from overseas
- estate income
- contributions from relatives
- annuities
- trust income
- farm or business income
- income from rent from properties
- accident compensation
- overseas pensions
- wages or salary.

Give net (after tax) amount.

 You will need to provide proof of this income.

**41. Did you or your partner (if you have one) get money from any source (other than from New Zealand Superannuation or other benefit) over the last 12 months?**

☐ No

☐ Yes

► Please provide details below and attach proof of all other income including amount received and frequency of payments:

## Your past income (over the last 12 months)

Where did it come from?	How much?	How often? (eg weekly)	Net	Interest rate
	\$		\$	%
	\$		\$	%
	\$		\$	%
	\$		\$	%

## Your partner's past income (over the last 12 months)

Where did it come from?	How much?	How often? (eg weekly)	Net	Interest rate
	\$		\$	%
	\$		\$	%
	\$		\$	%
	\$		\$	%

**42. Do you or your partner (if you have one) expect to get money from any source (other than from New Zealand Superannuation or other benefit) over the next 12 months?**

☐ No

☐ Yes

► Please provide details below:

## Your expected income (over the next 12 months)

Where will it come from?	How much?	How often? (eg weekly)	Net	Interest rate
	\$		\$	%
	\$		\$	%
	\$		\$	%
	\$		\$	%

## Your partner's expected income (over the next 12 months)

Where will it come from?	How much?	How often? (eg weekly)	Net	Interest rate
	\$		\$	%
	\$		\$	%
	\$		\$	%
	\$		\$	%

# Client Obligations

## Important

Please read this statement carefully and sign.

I understand that:

- if I have made a false statement **or**
- if I have failed to answer all the questions in full **or**
- if I do not tell Work and Income about changes in my life that might affect my Financial Means Assessment

then

- my subsidy or loan may be reviewed **and**
- I may have to pay back the total amount of any overpayment that I have received.

## Client obligations

I must tell Work and Income immediately if either my partner or I:

- have changes to my/our income or financial circumstances
- intend to travel overseas
- have changes to personal details (such as name, address or bank account details)
- are admitted to or discharged from hospital
- have been granted an overseas pension
- have any other change that may affect my/our Financial Means Assessment.

## Client declaration

I agree that Work and Income and the Ministry of Health can:

- share all information necessary for the purposes of provision of any Residential Care Subsidy to me or administering any Residential Care Loan for me
- provide information to my residential care provider about the progress of my application and the timing and amount of any payments to be made
- advise my residential care provider of the outcome of my application for the Residential Care Subsidy or the Residential Care Loan.

I have completed all the questions or they have been completed for me in this Residential Care Subsidy Application to Review Financial Means Assessment.

The information I have given is true and complete. The conditions for receiving this assistance have been explained to me/ or my agent and I/or my agent understand these conditions.

I/or my agent am also aware of and understand the Privacy Act statement contained in this application form.

### You must sign this page

Client's/Agent's name (print)

Client's/Agent's signature

Date

Day	Month	Year

Partner's/Agent's name (print)

Partner's/Agent's signature

Date

Day	Month	Year

### OFFICE USE ONLY

Date review form sent:

Day	Month	Year

Reason for review:

- |  |  |
|--|--|
| <input type="checkbox"/> Reapplying after being declined | <input type="checkbox"/> Relationship status changed |
| <input type="checkbox"/> Partner entered care            | <input type="checkbox"/> Loan to subsidy             |

Comments: (for example, PPF purchased or gifting done)
