

New Zealand Superannuation or Veteran's Pension current clients application



MINISTRY OF SOCIAL
DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

If you already get payments from Work and Income and want to apply for NZ Super or Veteran's Pension, you'll need to fill in an application.

If you're applying for NZ Super you can apply online. You'll only be asked questions that are relevant to you. To apply online or for more information go to workandincome.govt.nz or call us on **0800 552 002**.

If you're applying for Veteran's Pension you need to complete this form.

If you're completing this form, we suggest you read the instructions on pages 1 to 4 before you fill it in, so you get a feel for what's needed.

A SuperGold Card is a free discounts and concessions card. We'll automatically send you a card soon after your NZ Super or Veteran's Pension is granted. If you qualify for Veteran's Pension your SuperGold Card will automatically include a Community Services Card.

What you need to do next


When you can apply

You can apply for NZ Super or Veteran's Pension from 12 weeks before you turn 65 to avoid missing out on payments.

If you apply after you turn 65 your payments may only start from the date you apply.

What you need to do

You and your partner (if you have one) need to do several things before your payments can start.

1. Fill out this application form.
2. Collect all the documents you need to show us. We tell you about these documents in the application form (look for the ) and we also have a list on page 2.
3. Bring this application form and the documents to a meeting. If you don't already have a meeting arranged, contact us on **0800 559 009** so we can set one up for you.

You must give us all the information we need.

If you don't have all the information we need, talk with us and we may be able to help.

If we find out later that any information you give us is not true, or that you knew information you should have told us and did not tell us, we may stop paying your benefit. You might need to pay money back, we may impose a penalty, and you could be prosecuted.

NZ Super or Veteran's Pension

current clients checklist



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Once you've filled out the application form, use this checklist to tick off all the documents you need for your meeting with us.

Talk to us if you don't have any of the documents, have given them to us recently or if there might be a delay in getting them. In this form, if we say 'your partner' this only applies if you have one.

What you need to bring

Proof of who you are:

If you were born in New Zealand, bring one type of official identification that has your full legal name and your date of birth (for example, your birth certificate, passport, driver licence, firearms licence, deed poll).

If you were born overseas, bring proof that you have a right to live in New Zealand (for example, a citizenship certificate, a New Zealand passport, a passport from another country with residence class visa or proof of permanent residence).

Your partner may also need to provide this.

If your name has changed, bring your marriage certificate, deed poll, or other proof of the name change.

You need to bring **two more documents** that help to prove who you are (for example, a marriage certificate, bank statement, phone or power account, driver licence).

If you're using your residence in the Cook Islands, Niue and/or Tokelau to qualify for NZ Super you need to provide proof of the time you lived in those countries.

Proof of your bank account details, such as a bank statement.

If you're using identification that has expired, it must not be more than two years past the expiry date.

Depending on your answers you may need to bring:

Proof of payments, if you or your partner receive a benefit, allowance or pension from overseas.

Full birth certificates for each dependent child in your care.

Your marriage or civil union certificate, for a current relationship.

NZ Super or Veteran's Pension

current clients application



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In the applicant form, 'you', 'your', and 'yourself' means the person applying for NZ Super or Veteran's Pension.

If we say 'your partner' this only applies to you if you have one.

myMSD

Apply online instead
It's quicker and easier

my.msd.govt.nz

Tell us about yourself

This number can be found on your Community Services Card.

Client number

Tell us your details

ATTACHMENT FOR Q1:
Bring proof of who you are. What you need to bring is explained on page 2.

HOW TO ANSWER Q3:
Please only give us contact details you'd like us to use.

INFORMATION FOR Q5:
If you don't give us a tax code, your payment will be taxed at the higher 'no-notification rate' of 45%

ATTACHMENT FOR Q5:
If you use tax code 'STC' please provide proof from Inland Revenue.

1

What is your full name?

First and middle names

Surname or family name

2

What date were you born?

Day Month Year

3

How else can we contact you?

Tick the best way for us to first contact you

Home phone	()	<input type="checkbox"/>
Mobile phone	()	<input type="checkbox"/>
Other phone	()	<input type="checkbox"/>

4

Do you agree to get emails from us, including information about discounts and concessions for SuperGold Card holders?

No

Yes

↓ If yes, tell us your email address

I don't have an email address

A SuperGold Card will be sent to you automatically, once your NZ Super or Veteran's Pension is granted. It gives you access to thousands of discounts and concessions from businesses around New Zealand and Australia, and to New Zealand government and/or local council services.

5

What tax code do you want to use for your NZ Super or Veteran's Pension payments?

You can work out your tax code using the online calculator at ird.govt.nz or phone Inland Revenue on **0800 227 774**.

Tell us about your residence status

To confirm you meet the residency criteria for NZ Super, we may need proof of your travel movements from Immigration New Zealand. If you don't give permission, and we require proof, you'll need to get information about your travel movements and immigration status from Immigration New Zealand yourself and provide it to us.

6 Do you give us permission to get information about your travel movements and immigration status from Immigration New Zealand?

No



If no, you'll need to get the information from Immigration New Zealand yourself and provide it to us

Yes

7 Do you usually live in New Zealand?

No

Yes

8 Have you ever been granted a refugee or protected person status in New Zealand?

No

Yes

9 How many years, from the age of 50, have you lived in any of the following countries?

New Zealand

Cook Islands

Niue

Tokelau

None

10 How many years between the ages of 20 and 50 years old, have you lived in any of the following countries?

New Zealand

Cook Islands

Niue

Tokelau

None

11 Have you ever lived or worked in any countries outside of New Zealand?

No

[Go to question 14](#)

Yes



If yes, please list details below

Name of country	Date you entered this country	Date you left this country	Work	Study	Missionary work	Humanitarian work	Other
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					

HOW TO ANSWER Q7: By answering yes, you consider New Zealand your home, you're a legal resident, you currently live here on a day-to-day basis and you intend to stay.

ATTACHMENT FOR Q9: If you're using your residence in these countries to qualify for NZ Super or Veteran's Pension, you need to provide proof of the time you've lived there. Ask us if you need help with this.

INFORMATION FOR Q11: If you've lived overseas it may mean you're eligible for an overseas benefit or pension, which could affect your entitlement. For more information, phone **0800 777 227**.

HOW TO ANSWER Q11: If you don't know the exact date write the closest month and year.

ATTACHMENT FOR Q12:
You'll need to show us evidence of these payments, such as a pension certificate.

12

Do you get or qualify for a social security benefit, pension or allowance from overseas?

No **Go to question 14**

Yes **↓ If yes, tick the box that best describes your benefit, pension or allowance**

Retirement or old age Superannuation Disability or health condition

Widow or survivor Child or dependent War related

Other **↓ If other, please provide details below**

13

If you ticked 'yes' for question 12, please give details of the payments you get.

	Payment 1	Payment 2
What country does the payment come from?		
How much do you get each time the payment is made (in overseas currency)?		
Is this amount before or after tax?		
How often do you get the payment (for example, weekly, fortnightly, monthly)?		
What is the name of your pension, allowance or benefit?		
What is the payment reference number?		

Tell us whether you're a veteran

14

Have you served with the New Zealand Armed Forces?

No Yes

If you've ticked 'yes', you may be entitled to a:

- Veteran's Pension (for more information call **0800 650 656**), and/or a
- War Disablement Pension or associated payments (for more information call Veterans' Affairs New Zealand on **0800 4 VETERAN (0800 483 8372)**).

Tell us about your living situation

15

Do you live alone?

I live with my partner **Go to question 19**

I live with other people **Go to question 16**

Yes **Go to question 17**

INFORMATION FOR Q16:
We use this information to work out the rate of NZ Super or Veteran's Pension we pay you.

16

Please provide details for anyone you live with:

Person 1

Relationship to you

Is this person 18 years or younger?

No **Go to the next person or question 19**

Yes **↓ If yes, please answer the following**

What is their date of birth? Day Month Year

Does this person attend school or a tertiary institution?

No Yes

**ATTACHMENT FOR Q16:**

If you need to include more than two people in your application, please write these details about each one on a separate sheet of paper, and bring them with this application form.

17**Person 2**Relationship to you

Is this person 18 years or younger?

 No**Go to question 19** Yes**↓ If yes, please answer the following**

What is their date of birth?

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Does this person attend school or a tertiary institution?

 No Yes**18****What is your 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 Mobile home – self-contained A boat moored within New Zealand territorial waters Accommodation in a caravan park Other**↓ If other, please provide details below**

**INFORMATION FOR Q18:**

'Self-contained' for a granny flat or unit means there is a kitchen or a kitchenette and a bathroom.

'Self-contained' for a mobile home means it needs to have facilities for:

- day-to-day living
- sleeping
- preparing and cooking food.

It must also have a:

- sink
- toilet
- fresh water tank
- waste water tank.

Tell us about your partner**19****Do you have a partner?**

By 'partner' we mean someone you are in a relationship with. For our full definition of 'partner', go to workandincome.govt.nz and search on *Are you in a relationship?*

 No**Go to question 29** Yes

If your partner doesn't qualify for their own NZ Super and they still need financial help, they'll need to apply for another benefit of their own.

If they're not sure what the best option is, please talk with us.

20**Does your partner need any financial help from us?** No Yes**Your partner will need to apply for their own benefit. Talk to us about the best option.**

21

What is your partner’s full name?

First and middle names

Surname or family name

22

What is your partner’s date of birth?

Day Month Year

23

Are you living at the same address as your partner?

No

Go to question 24

Yes

Go to question 25

24

Where does your partner live?

Rest home

Public hospital

Private hospital

Prison

Other



If other, please tell us where they live

Tell us about time spent overseas

25

Does your partner usually live in New Zealand?

No

Yes

26

Has your partner ever lived or worked in any countries outside of New Zealand?

No

Go to question 29

Yes



If yes, please list details below

HOW TO ANSWER Q25:

By answering yes, your partner considers New Zealand their home, they’re a legal resident, they currently live here on a day-to-day basis and they intend to stay.

INFORMATION FOR Q26:

If your partner lived overseas it may mean they’re eligible for an overseas benefit or pension, which could affect your entitlement.

For more information, phone **0800 777 227**.

HOW TO ANSWER Q26:

If you don’t know the exact date write the closest month and year.

Name of country	Date you entered this country	Date you left this country	Work	Study	Missionary work	Humanitarian work	Other
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					
	/ /	/ /					

27

Does your partner get or qualify for a social security benefit, pension or allowance from overseas?

You need to tell us this because your payments may be affected if they get or are eligible for an overseas pension or benefit.

No [Go to question 29](#) Don't know [Go to question 29](#)

Yes [↓ If yes, tick the box that best describes their benefit, pension or allowance](#)

Retirement or old age Superannuation Disability or health condition
 Widow or survivor Child or dependent War related
 Other [↓ If other, please provide details below](#)

28

If you ticked 'yes' for question 27, please give details of the payments your partner gets.

	Payment 1	Payment 2
What country does the payment come from?		
How much do they get each time the payment is made (in overseas currency)?		
Is this amount before or after tax?		
How often do they get the payment (for example, weekly, fortnightly, monthly)?		
What is the name of your pension, allowance or benefit?		
What is the payment reference number?		

Extra help information

INFORMATION FOR Q29:

If you don't already get extra help with your current benefit, you may need to complete a separate application.

ATTACHMENT FOR Q30:

You'll need to provide proof of your income and assets.

INFORMATION FOR Q32:

For example a room you use as an office.

29

Do you wish to get extra help with your NZ Super or Veteran's Pension?

No [Go to page 9](#) Yes

30

Have your income and asset details changed since you last advised us?

No Yes

31

Do you have people who you live with that pay you board or rent?

No Yes

32

Do you claim back part of the home you live in as a business expense from Inland Revenue at the end of each tax year?

No Yes

Are you involved in a trust?

33

Are you involved in a trust, or have you ever been involved in a trust?

'Involved' means one or more of the following:

- you've set up a trust, usually by making a gift of assets or property
- you've transferred assets to a trust
- you make decisions about managing a trust
- you benefit from a trust, for example, by receiving income such as trust distributions.

No Yes [↓ If yes, please write the name of the trust](#)

Name of trust



What you need to do (your obligations)



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When you're getting payments from us, there are some things you need to do to make sure you're getting paid the right amount.

If you don't do these things, we could pay you the wrong amount. It could also mean we have to reduce or stop your payments. We don't want you to miss out on money you need so please read these carefully.



Let us know when things change

You need to let us know about changes that might affect the amount you're paid.

Changes to information about you or your family, like:


- name, address, contact details or bank account number
- starting or stopping living alone
- starting or ending a relationship, marriage, or civil union
- changes to any board or rent payments you get, if you get Extra Help from us
- your partner passes away
- the number of dependent children you support.

We also need to know if you:

- go into or come out of hospital
- are being held in custody or on remand.

If we have the wrong information we could pay you the wrong amount. If we pay you too much you might have to pay us back.



 We can't pay you while you're out of New Zealand unless we've agreed to it.

Tell us if you're going overseas

If you're travelling or moving overseas you may need to let us know because we may have to change or stop your payments. Whether you need to let us know will depend on your travel plans. There are some examples below.

If there's a good reason you can't tell us before you go, then you need to let us know as soon as you can.

To let us know your travel plans, you can complete a form on our website. Go to workandincome.govt.nz and search on *Overseas travel dates*.

When you get other payments from us

If you get other payments from us like Winter Energy Payment, Disability Allowance, Accommodation Supplement or Temporary Additional Support, you can keep getting them only for the first 28 days you're away. You need to let us know about your travel plans before you go.

Travelling for short trips of 28 days (four weeks) or more

You need to let us know if:

- you're going to be away more than 28 days, or
- you don't know how long you'll be away for, or
- you intend to have more than one overseas trip in the next 12 months.

Travelling for 26 weeks or less

You can travel to any country for 26 weeks or less and keep getting your payments as usual.

If you're still overseas after 26 weeks your payment may stop. If you're still over there after 30 weeks you may have to repay all your payments since you left.

If you get held up because of circumstances beyond your control that you couldn't have known about before you left, you may be able to keep payments made in the first 26 weeks.

Travelling for more than 26 weeks

If you have no intention of living in the countries you're planning to visit, you may be able to get all or some of your NZ Super or Veteran's Pension while you're away. At least six weeks before you go, you need to contact us to apply to get your payments overseas. What you'll get depends on where you go and how long you've lived in New Zealand.

Going overseas to live

You can live almost anywhere in the world and still get all or some of your NZ Super or Veteran's Pension. What you'll get depends on where you go and how long you've lived in New Zealand. Generally you must apply for payment overseas about 4-6 weeks before you leave New Zealand. To arrange a meeting, call our International Services team on **0800 777 227**.

What can happen if you don't meet your obligations

Your payments can stop if you don't tell us something we need to know.



i You can find full details about what can happen if you don't meet your obligations at msd.govt.nz/not-meeting-your-obligations

You need to do the things listed above to keep getting payments from us.

If you don't tell us something we need to know, your payments can stop. In some cases you could even be prosecuted.

Your rights

You have the right to ask us to review any decision we make about your payments.



If you don't think we have things right or there's something you don't understand:

- call us – we can usually fix it over the phone
- you have the right to ask us to review the decision. Find out how at msd.govt.nz/reviews



How we protect your privacy



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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 Acts, 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 personal 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

Signature page

Applicant

I have answered all the questions that apply to me and my situation.

The information I have given you is true and complete.

I understand the things I need to do while I'm getting payments.

I will do what I need to do to meet my obligations.

I understand what you do with my personal information and how you protect my privacy.

Applicant's name (print)

Applicant's signature

Day

Month

Year

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Applicant's partner

I have answered all the questions that apply to me and my situation.

The information I have given you is true and complete.

I understand what you do with my personal information and how you protect my privacy.

Applicant's partner's name (print)

Applicant's partner's signature

Day

Month

Year

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Helper's statement

Complete this if you've helped the applicant or their partner to complete this application form.

Your first name

Your surname or family name

Your address

Your phone number

Tick the box for the statement that applies

I completed this application form at the request of the person applying. They told me they understood what they were signing. The statements and answers I have completed are true and complete as given to me by the person applying.

I completed this application form at the request of the partner of the person applying. They told me they understood what they were signing. The statements and answers I have completed are true and complete as given to me by the partner of the person applying.

Helper's signature

Day

Month

Year

<input type="text"/>	<input type="text"/>	<input type="text"/>
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