



Student Allowance application form

Complete this form if you want to apply for a Student Allowance. You can also apply for your Student Allowance online at **studylink.govt.nz**

To get a Student Allowance you'll need to be:

- at least 18 years old (some 16–17 year olds can also get it) and
- under 65 on the start date of your course.

You must also be

- a New Zealand citizen, or
- ordinarily resident in New Zealand and
 - have lived in New Zealand for at least 3 years and
 - have been entitled under the Immigration Act 2009 to reside indefinitely in New Zealand¹ for at least 3 years or
- a refugee, protected person, or their immediate family member, who meets the residency requirements. You can talk to us for more information or find it at **studylink.govt.nz** and search on 'residency or
- entitled to reside indefinitely in New Zealand and have been sponsored into New Zealand by a family member, who at the time was recognised as a refugee or a protected person.

You'll also need to be studying a full-time course (or have our approval to study with limited full-time² status) and at secondary school or on an undergraduate tertiary course or any Bachelor degree with honours approved by the Tertiary Education Commission.

More information about the Student Allowance can be found over the page.

¹ Someone who is entitled to reside in New Zealand indefinitely and holds a residence class visa under the Immigration Act 2009 (holders of resident permits and returning resident's visas (RRVs) granted under the Immigration Act 1987 are deemed to hold a residence class visa under the Immigration Act 2009).

² Usually you have to be studying full-time to get a Student Allowance. But if you're not studying full-time you may qualify for limited full-time status if:

- you're completing a recognised programme that you have previously studied (but did not complete) and to do this you need to study less than full-time but more than half of a full-time course or
- your education provider supports your application to study less than full-time for one of the following reasons:
 - you have an illness that stops you studying full-time or
 - it's in your academic best interests to study less than full-time. Academic best interests means; that the student would be likely to fail, for academic reasons, if they undertook a full-time course but would be likely to pass more than half of the course if they studied part-time or
 - you can't study full-time where there is sufficient cause outside your control (this could include a disability which stops you studying full-time).

You must give us all the information we need.

If you do not 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 your payments. You might need to pay money back, we may impose a penalty, and you could be prosecuted.

More information about the Student Allowance

You need to apply as soon as possible to allow enough time for your application to be completed. Remember, you can apply for your Student Allowance online at studylink.govt.nz

You can earn up to \$276.11¹ a week before tax before your Student Allowance payments are affected. If you have a partner, any income that you or your partner earn, may affect your Student Allowance payments.

Your parents' income is tested if you're under 24 years old without children. This includes people who are in a marriage, civil union or de facto relationship. We have a definition for parent for Student Allowance. To see what this is, go to page 21.

- If you only have one parent, they will need to complete a One Parent application form instead of the Parents' application form on page 14. Visit our website studylink.govt.nz to download the One Parent application form.
- If, due to exceptional circumstances, neither of your parents support you, you will need to complete an Independent Circumstances Allowance application form as well as this one. Visit our website to download the Independent Circumstances Allowance application form.

Generally you can only get the Student Allowance for up to:

- 92 weeks for secondary school study
- 200 weeks for tertiary study or
- 120 weeks for tertiary study if you are aged 40 or over.

However, you may be able to get more in some situations – visit our website studylink.govt.nz to find out more.

¹ The personal income threshold is reviewed on 1 April each year. You can check the current rates at studylink.govt.nz

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 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

Before you start – Read this page

Here are some important things you need to know before you complete your application.

Use blue or black ink only

When completing your application you must only use blue or black ink. If your application is completed in any other colour we might get you to complete another one.

Answer all the questions

It's important to answer every question in your application. If a question doesn't apply to you, use 'N/A' or 'nil'. Don't leave the space blank, unless indicated on the form, as this could delay the process and you may not get paid on time.



You may need to provide documents

When you apply for the Student Allowance, you may need to provide certain documents with your application – these are listed on page 31.

All documents sent to StudyLink must be a verified copy. A verified copy is a copy of the original document which has been signed and dated by someone like a Solicitor/Lawyer, Notary Public, Court Registrar, an approved person at an education provider, school principal, StudyLink or Work and Income staff member or Justice of the Peace (listed in the Yellow Pages) who can confirm that the copy is the same as the original. They must print their name and title on each page and write that it is a true copy and sign it.

The best way to send your documents to us is online using connect.co.nz. Please remember to include your name and client number with any documents that you send to us. For more information visit connect.co.nz.

Information or documents required to complete your application can be sent to us later if you don't have them now. **You need to provide any information we need before your study ends or we may not be able to pay you.**

In most cases you won't have to provide any document that StudyLink has already seen.

Parents' income evidence

Your parents' income is tested if you're under 24 years old without children.

Where the Income source table on pages 16 and 17 is completed by an accountant or tax agent and they have provided their details and signed the declaration page, evidence is not required.

If parents complete the table themselves we require evidence to support those declarations.



Sign and date the form

Remember to sign and date this application on page 31 – and make sure anyone else who needs to sign it has done so.

How to return this form

The easiest and fastest way to return your completed form to us is online using connect.co.nz. Please remember to include your name and client number.

For more ways to contact us, visit our website studylink.govt.nz

We're happy to help you complete your application.

Part 1: Personal details

The documents we need to see are listed on page 31.

This section tells us about you. You must complete this.

1. What is your client number?

If you have received assistance from StudyLink or Work and Income before, write your client number here if you know it. This number can be found on your Community Services Card if you have one.

Client number

2. What is your full name?

First name	Middle name(s)	Surname or family name
<input type="text"/>	<input type="text"/>	<input type="text"/>

3. What is your legal name as it appears on your birth certificate? (If different from above)

First name	Middle name(s)	Surname or family name
<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Do you enrol with your education provider(s) under a different name?

☐ Yes

☐ No (Go to Q5)

If yes, please give us the name(s) you used in your enrolment:

Education provider 1		
<input type="text"/>		
First name	Middle name(s)	Surname or family name
<input type="text"/>	<input type="text"/>	<input type="text"/>

Education provider 2		
<input type="text"/>		
First name	Middle name(s)	Surname or family name
<input type="text"/>	<input type="text"/>	<input type="text"/>

5. Have you ever been known by any other name(s)?

☐ Yes

☐ No

If yes, please write them out below:

First name	Middle name(s)	Surname or family name	Maiden name? Yes/No
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6. What date were you born?

Day Month Year



We need to see a verified copy of your birth certificate or passport (unless StudyLink has already seen it).

7. Are you:

☐

Male

☐

Female

☐

Gender diverse

8. Are you in prison?

☐

Yes

☐

No

If yes, you will not be eligible for a Student Allowance (unless you're on home detention) but you could be eligible for a Student Loan for compulsory fees and course-related costs. You can't get a Student Loan for living costs (unless you're on home detention). Visit our website studylink.govt.nz or call us on **0800 88 99 00** for more information.

9. What is your Inland Revenue (IRD) tax number?

If you have an IRD number with less than nine digits, please insert zero(s) in front of your IRD number. If you don't have one, you need to get one from Inland Revenue by calling **0800 22 77 74**, or you can download a form at ird.govt.nz.

10. What tax code do you want for your Student Allowance?

If you're not sure which tax code to use, visit Inland Revenue's website ird.govt.nz, or call them on **0800 22 77 74**.

Please note: you will be taxed at the highest rate until you tell us the code you want to use.

10a. Tell us the date you want to start using this tax code from.

Day

Month

Year

11. What bank account do you want your payments to be paid into?

Account name:

Bank

Branch

Account

Suffix


Please note – if you give us an incorrect bank account number we can't pay you, please check it against your bank statement.

11a. Enter the date you want this account to be used for payments.

Day

Month

Year

 **We need to see evidence of this account. Evidence could be a verified copy of a pre-printed deposit slip or statement with your name, bank, branch and account number (unless StudyLink has already seen it).**

12. Where will you live while getting Student Allowance?

If you don't know where you will be living go to Q12b, but you need to let us know as soon as you do. Please note, this must be a New Zealand address and not the address of your education provider.

Flat/House number	Street address			
Suburb	City	Post code	Country	
			New Zealand	

12a. Please give us the date you started or will start living at this address.

<input type="text"/>	<input type="text"/>	Day	<input type="text"/>	<input type="text"/>	Month	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Year
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12b. How would you like to receive your mail?

You can view your mail online at our website through MyStudyLink. We'll send you an email or text when you have new mail to view.

- ☐ Online
- ☐ Post (Go to Q12d)

12c. How would you like to be notified that you have letters online to view?

- ☐ Text message.
Please enter your mobile number for text notifications to be sent to:
- ☐ Email message.
Please enter your email address for notifications to be sent to:

Mail online declaration

I agree to receive letters and notices from StudyLink via my online MyStudyLink account, rather than by post. This includes Student Loan disclosure notices and other notices required under legislation.

I agree that:

- ☐ StudyLink may notify me of new letters/notices by email or text. However, it is my responsibility to check my account regularly.
- ☐ Some letters/notices may be sent to me by post.
- ☐ This consent may vary some parts of my Student Loan contract or scholarship agreement (if applicable) regarding letters and notices.



Student's signature

<input type="text"/>	<input type="text"/>	<input type="text"/>	Day	<input type="text"/>	<input type="text"/>	Month	<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>	Year
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12d. Will your mailing address be different from where you will live?

If you are not currently living at your study address or you don't know it yet, you must give us a postal address. If you select online as your preferred option for receiving mail, some information may still need to be sent by post.

- ☐ Yes (Provide details below) ☐ No (Go to Q13)

Please note, this must be a New Zealand address and not the address of your education provider.

Postal address			
<input type="text"/>			
Suburb	City	Post code	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	New Zealand

12e. Enter today's date or the date you want your mail to start being sent to this address.

<input type="text"/>	<input type="text"/>	Day	<input type="text"/>	<input type="text"/>	Month	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Year
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13. How else can we contact you?

Phone	Mobile ¹	Fax	Email ¹
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

¹ If you give us your mobile number or email address we may use these to send you text messages or emails to let you know about important changes, appointment reminders or that it's time to reapply if you're continuing with your studies. This must be your own mobile number or email address. Do not give the contact details of your education provider.

14. Were you born in New Zealand?

☐ Yes (Go to Q15) ☐ No


14a. What country were you born in?

14b. Are you a:

☐ Residence class visa holder¹ ☐ Protected person² ☐ New Zealand citizen
☐ Other (Provide details eg. Refugee)

If you are a residence class visa holder or New Zealand citizen, when were you granted residency/citizenship?

Day Month Year

 **We need to see a verified copy of your birth certificate, passport or letter from Immigration New Zealand to prove your residence (unless StudyLink has already seen it).**

14c. If you are a residence class visa holder, were you granted residency under sponsorship?

☐ Yes ☐ No

14d. When did you come to New Zealand to live?

Day Month Year

15. Do you usually live in New Zealand?

This means you consider New Zealand your home, you are a legal resident, normally live here and intend to stay permanently.

☐ Yes ☐ No (It's unlikely your application will be approved – call us on **0800 88 99 00** to discuss this)

16. The following information is only needed for statistical purposes. It's up to you whether you answer this question. We'd appreciate it if you would tick the ethnic group(s) you most identify with.

<input type="checkbox"/> NZ European	<input type="checkbox"/> Other European	<input type="checkbox"/> NZ Māori	<input type="checkbox"/> Samoan	<input type="checkbox"/> Cook Island Māori
<input type="checkbox"/> Tongan	<input type="checkbox"/> Niuean	<input type="checkbox"/> Tokelauan	<input type="checkbox"/> Fijian	<input type="checkbox"/> Pacific Island – Other
<input type="checkbox"/> Southeast Asian	<input type="checkbox"/> Chinese	<input type="checkbox"/> Indian	<input type="checkbox"/> Asian – other	<input type="checkbox"/> Middle Eastern
<input type="checkbox"/> Latin American	<input type="checkbox"/> African	<input type="checkbox"/> Other (please provide details)	<input type="text"/>	

If you are NZ Māori, which iwi do you belong to?

Once you start getting Student Allowance you need to tell us about changes so we can make sure you're getting the right payments. The easiest way to tell us about your changes is using MyStudyLink at studylink.govt.nz



Remember to read your obligations on page 30, then sign and date your declaration on page 31.

¹ A residence class visa holder is someone who is entitled to reside in New Zealand indefinitely and holds a residence class visa under the Immigration Act 2009 (holders of resident permits and returning resident's visas (RRVs) granted under the Immigration Act 1987 are deemed to hold a residence class visa under the Immigration Act 2009). If you are an Australian citizen or Australian permanent resident please choose 'residence class visa holder'.

² As defined under sections 130 and 131 of the Immigration Act 2009.

Part 2: Student Allowance

IMPORTANT: If you received a Student Allowance last time you studied a full-time tertiary course, you must have passed more than half the work of a full-time tertiary course to continue to get a Student Allowance.

1. Do you have any children in your care?

By children we mean anyone under 24 years old who lives with you at least 50% of the time and who you support – this can include stepchildren, children at boarding school, adopted or whāngai children, grandchildren or mokopuna. It doesn't include any children who are on a Student Allowance or Work and Income benefit, or who earn more than \$80 a week before tax, or anyone who you are being paid a Work and Income Orphan's or Unsupported Child's Benefit for. Please note: this definition is different from that of the Jobseeker Support Student Hardship.

☐

Yes

☐

No (Go to Q2)

If yes, please give us their details:

Child's full name	Date of birth	Date came into care ¹
	/ /	/ /
	/ /	/ /
	/ /	/ /

1a. Will you have a shared custody arrangement for any of the above children during your study break?

☐

Yes

☐

No (Go to Q2)

If yes, please give us details of the shared custody arrangement:

Child's full name	Days per fortnight	Name of person you have shared custody with	Address of person you have shared custody with

You could be eligible for the Childcare Subsidy or Out of School Care and Recreational Subsidy (OSCAR). For more information visit our website [studylink.govt.nz](https://www.studylink.govt.nz)

 We need to see a verified copy of each child's full birth certificate (unless StudyLink has already seen them).

If you have any children you may qualify for Working for Families Tax Credits from Inland Revenue. To find out more visit Inland Revenue's website [ird.govt.nz](https://www.ird.govt.nz), or call them on **0800 227 773**.

2. What is your current relationship status?

☐

Single (this includes separated, divorced or widowed)

☐

Married

☐

De facto relationship

☐

Civil union

¹ Please enter your child(ren)'s date of birth or the date your child(ren) came into your care.

2a. What is the date your current relationship status started?

If you are single and have never been married, in a civil union or de facto relationship then enter your date of birth.

<input type="text"/>	<input type="text"/>	Day	<input type="text"/>	<input type="text"/>	Month	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Year
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For Student Allowance purposes, your parents' income will be taken into account if you are under 24 years old without children in your care, regardless of your relationship status.

Your partner must complete the Partner's form on page 25 if:

- you and your partner are 24 years old or over, or
- you or your partner have children in your care.

3. Is your partner under 24 years old?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
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You need to let us know as soon as you and your partner are both 24 years old or over or you have a child come into your care.

4. Will you be living with your partner while studying?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
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5. Will you be living in your parent(s) home or in a home provided or maintained by your parent(s) while studying?

A parent is a natural parent, a step-parent¹ or any other person acting in place of a parent of that student.

<input type="checkbox"/> Yes (Go to (Q5a))	<input type="checkbox"/> No (Go to Q6)
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5a. Will your parents be living in the home with you while you are studying?


<input type="checkbox"/> Yes (Go to Q8)	<input type="checkbox"/> No (Go to Q5b)
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5b. Will you be paying market rent or will you be responsible for the outgoings relating to that home?

By market rent we mean what you might reasonably expect to pay for rent for the area of the home that you occupy, in comparison with rent levels for similar properties in similar areas.

Outgoings can include payments for mortgage, rates, house insurance and essential repairs and maintenance for the area of the home you occupy. Expenses such as phone, power or internet payments are not considered to be outgoings.

<input type="checkbox"/> Yes, I pay market rent (Go to Q8)	<input type="checkbox"/> Yes, I pay for the outgoings related to the home (Go to Q8)	<input type="checkbox"/> No (Go to Q8)
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 We need evidence that shows you are paying market rent for the property. If you are responsible for payments of the outgoings for the home, we need to see evidence of these payments.

6. Will you be living in a hostel or hall of residence while studying?

<input type="checkbox"/> Yes (give details below, then go to Q8)	<input type="checkbox"/> No (Go to Q7)
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Which hostel/hall of residence?	Is your room single or double?
<input type="text"/>	<input type="text"/>

7. Will you (or your partner) be living in a public housing property² while studying?

<input type="checkbox"/> Yes	<input type="checkbox"/> No (Go to Q8)
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¹ A step-parent is a person who is married to, or in a civil union or de facto relationship with, the parent of the student. It also includes a person acting in place of the parent of the student.

² Public housing properties are provided by Kāinga Ora and approved community housing providers.

If yes, will your (or your partner's) name be on the tenancy agreement?

☐ Yes

☐ No

If yes, you won't be able to get an Accommodation Benefit.

8. Will you be 16 or 17 years old when you start studying?

Note: You do not need to answer this question if you:

- qualify for an Independent Circumstances Allowance
- are studying at secondary school
- are studying at a tertiary provider and you will have a supported child in your care when you start study.

☐ Yes

☐ No (Go to Q9)

If yes, have you:

☐ Completed Year 13 at secondary school

☐ Attained 42 credits or more at NCEA level 3

☐ Obtained admission into a full-time tertiary course which has an academic entry requirement of 42 or more credits at NCEA level 3

☐ Attained 42 credits or more at level 4 on the National Qualifications Framework

☐ None of the above



We may need to see a verified copy of your results. The checklist on page 31 has more information about what you need to provide.

9. Have you at any time since 1 January 1999 received a Student Allowance?

☐ Yes (Go to Q9c)

☐ No

9a. Have you at any time studied at a tertiary education provider?

☐ Yes

☐ No (Go to Q10)

9b. Please give us details of your tertiary studies:

Include all tertiary courses you've been enrolled in – full-time, part-time and semester courses whether you finished them or not. Please use a new line for each separate enrolment.

Year	Education provider (full name)	Study programme (full name)	Full-time? Yes/No	Pass ¹ the course? Yes/No	How many weeks on Student Allowance? (if none, write 'NIL')
1995	Massey University	Bachelor of Science	Yes	No	37

¹ An enrolment must have a certain EFTS (equivalent full-time student) value to be considered full-time depending on the length of the enrolment. You must pass more than half of the EFTS needed to be full-time to get another Student Allowance. For example, a 52 week long course needs a minimum EFTS value of 0.8 to be full-time. This means if your course is 52 weeks (or longer) you will only be required to pass 0.4001 EFTS or more to get another Student Allowance, even if your course is more than 0.8 EFTS. For more details visit studylink.govt.nz

9c. Did you pass¹ more than half the work of a full-time tertiary course last time you got a Student Allowance?

We check your study results with the Ministry of Education. If you answer 'yes' and the information they send us confirms you didn't pass¹ more than half the work of a full-time tertiary course, you may have to repay any payments you have received. If you don't know yet, please tick 'I'm not sure'. You can let us know when you have your study results.

- ☐ Yes (Go to Q10)
- ☐ No (Go to Q9d)
- ☐ I'm not sure (You need to tell us as soon as you know – Go to Q10)
- ☐ I've never had a Student Allowance for tertiary study before (Go to Q10)

9d. Why didn't you pass¹ more than half?

Please explain here:

 **We need to see evidence of your explanation – for example, a verified copy of a letter from someone like your doctor, solicitor or minister. This evidence should confirm your circumstances and whether you are now capable of undertaking full-time study.**

9e. Have you since passed¹ more than half the work of a full-time tertiary course at your own expense?

This means passing more than half the work of a full-time tertiary course for which you have met your course costs and living expenses by any other means such as working, savings, scholarships or Student Loan.

- ☐ Yes ☐ No (You may not be eligible for Student Allowance – call us on **0800 88 99 00** to discuss this)

If yes, please give us details of this study

Year	Education provider (full name)	Study programme (full name)	Full-time? Yes/No	Pass ¹ the course? Yes/No	How many weeks on Student Allowance? (if none, write 'NIL')
1995	Massey University	Bachelor of Science	Yes	No	37

¹ An enrolment must have a certain EFTS (equivalent full-time student) value to be considered full-time depending on the length of the enrolment. You must pass more than half of the EFTS needed to be full-time to get another Student Allowance. For example, a 52 week long course needs a minimum EFTS value of 0.8 to be full-time. This means if your course is 52 weeks (or longer) you will only be required to pass 0.4001 EFTS or more to get another Student Allowance, even if your course is more than 0.8 EFTS. For more details visit studylink.govt.nz

10. Do you know what you're studying?☐

Yes

☐

No (Apply now and let us know as soon as you decide what and where you'll be studying. Go to Q10a)

If yes, please give us these details – you must let us know if anything changes during the year:

Please note: If you are studying a postgraduate programme you may not qualify for a Student Allowance.

Education provider (full name)	Study programme (full name)	Student ID ¹ (important)	Campus name/ location	Extramural? Yes/No	Start date	End date
Massey University	Bachelor of Science	ADCD1234	Albany	No	01/02/2015	31/10/2018
					/ /	/ /
					/ /	/ /

10a. Are you going to be living overseas while you're studying?☐

Yes

☐

No

If you're studying overseas you will need to complete an Overseas Study application form as well. You can download this form from our website studylink.govt.nz

You can earn up to \$276.11 a week before tax before your Student Allowance payments are affected. If you have a partner, any income that you or your partner earn may affect your Student Allowance payments. We may check your income with Inland Revenue.

11. Will you be getting any income while studying?

Income is any money you get from any source, taxable or non-taxable. This could include, but is not limited to, wages, salary, termination payment, bonus pay, holiday pay, child support (private arrangement or through Inland Revenue), maintenance payments, paid parental leave, interest from savings and investments, dividends from shares, income from a family trust, farm or business, income from boarders or rent, superannuation, overseas benefits and pensions, weekly accident insurance payments, some scholarships, any indirect monetary benefits you get such as free board or shares in a business, and any other income that you have or may deprive yourself of. Please don't include your Student Allowance, Student Loan or Family Tax Credit as income.

☐

Yes

☐


No

If yes, please give us details of your income per week before tax:

By per week we mean from each Monday to the following Sunday.

Type of income	Weekly income before tax	Hours worked each week	Start date	End date	Employer's name or income source
	\$		/ /	/ /	
	\$		/ /	/ /	

Employer's trading name (if different)	Business address	Suburb/City/Town
1.		
2.		

 Your Student Allowance is assessed based on the income you declare when you apply. If your income in any week is different to what you declared, you must let us know straight away as it could affect your payments. Your Student Allowance for any week is affected by the income you earn in that week. We may ask for evidence of your income at any time in the future. We may also check your income with Inland Revenue.

If you earn any income you need to let us know by the Friday of the week you earn it – if you don't you could be overpaid and you'll need to pay the money back.

¹ If you don't have a student ID it's very important that you ring us as soon as you do. Please note that some education providers don't give out student IDs. If you're unsure contact your education provider.

² If you don't have a Student ID it's very important you ring us as soon as you do. Please note that some education providers don't give out Student IDs – if you're unsure contact your education provider.

Part 2a: Parents' form for students under 24 years old without children

This form is to be completed by the two main parents¹ of students who are under 24 years old without dependent children. This includes students who are married or in a de facto or civil union relationship.

For a student to get the Student Allowance, their parents' combined income must be less than:

- \$137,187.86² if the student lives away from a parental home to study or
- \$127,701.81² if the student lives in a parental home.
- If you are the student's only parent, don't complete this application. You will need to complete a One Parent application form instead. You can download one from our website studylink.govt.nz
- If either parent wishes to keep their details confidential they can each complete a separate Parent's form and send it to us.

Parents' details

1. What is your legal name as it appears on your birth certificate or passport?

First parent

First name	Middle name(s)	Surname or family name	Relationship to student

Second parent

First name	Middle name(s)	Surname or family name	Relationship to student

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

First parent

☐ Yes☐ No

Second parent

☐ Yes☐ No

We need to know if you are living in separate households while the student is studying. If you are, we'll disregard \$3,400 of your joint income.

2a. What is your street address?

By street address we mean a physical address. We need this information to determine if you are living in separate households. By separate households we mean living at different addresses for the majority of the week. Separate households do not include addresses used for holiday periods. You need to let us know if this changes.

First parent

Flat/House number	Street address		
Suburb	City	Post code	Country

Second parent

Flat/House number	Street address		
Suburb	City	Post code	Country

¹ You can find our definition of parent on page 21.

² Parents' income thresholds are reviewed on 1 April each year.

2b. What New Zealand address do you want your mail sent to (if different from the above address)?

If you live overseas, please provide a contact address in New Zealand. If you don't live with the student and want to use their address, please include C/O in front of the address.

First parent

Flat/House number	Street address			
Suburb	City	Post code	Country	
			New Zealand	

Second parent

Flat/House number	Street address			
Suburb	City	Post code	Country	
			New Zealand	

3. How can we contact you?**First parent**

Phone	Mobile	Fax	Email

Second parent

Phone	Mobile	Fax	Email

4. 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
4a. Do you or have you had a Transition Support Living Arrangement through Oranga Tamariki for the student?**First parent**
☐ Yes

☐ No
Second parent
☐ Yes

☐ No
4b. While supporting the student, will you be supporting any other full-time dependent students 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 the application.


First parent
☐ Yes

☐ No
Second parent
☐ Yes

☐ No

If yes, please give us their details:

Student's full name	Date of birth	Which education provider are they studying with
	/ /	
	/ /	
	/ /	
	/ /	
	/ /	

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

Tell us about your income

5. Are you currently receiving a Work and Income benefit, NZ Super or Student Allowance?

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

First parent

☐

Yes

☐

No (Go to Q6)

Second parent

☐

Yes

☐

No (Go to Q6)

If yes, what is your client number?

If you have received assistance from StudyLink or Work and Income before, write your client number here if you know it. This number can be found 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

 | |

Second parent

 | |

6. What is your current annual gross income?

Please complete the table below and 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\$).

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' on pages 21 and 22 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)	\$	\$

Income source table	First parent	Second parent
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, offsets 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.

7. If you don't receive any income please explain why.

First parent

Second parent

First parent Declaration for Accountant/Tax Agent

If you have completed/provided the income information on the Income source table 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



Accountant's/Tax Agent's signature

--

--	--

Day

--	--

Month

2	0		
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Year

Second parent Declaration for Accountant/Tax Agent

If you have completed/provided the income information on the Income source table 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



Accountant's/Tax Agent's signature

--

--	--

Day

--	--

Month

2	0		
---	---	--	--

Year



Parent's checklist

Make sure the Total income has been included on the Income source table on page 17.

First parent	Second parent
<input type="checkbox"/>	<input type="checkbox"/>

If your accountant or tax agent has completed the Income source table on your behalf, make sure they have also completed the declaration on page 18.

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------



Documents to provide

Where the Income source 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 have completed the table yourself we require evidence to support your declarations.

All documents sent to StudyLink must be a verified copy. A verified copy is a copy of the original document which has been signed and dated by someone like a Solicitor/Lawyer, Notary Public, Court Registrar, an approved person at an education provider, school principal, StudyLink or Work and Income staff member or Justice of the Peace (listed in the Yellow Pages) who can confirm that the copy is the same as the original. They must print their name and title on each page and write that it is a true copy and sign it.

You need to provide any information we need before the end of the student's course or their Student Allowance application may be closed.

The best way to send your documents to us is online using connect.co.nz. Please remember to include the student's name and client number with any documents that you send to us. For more information visit connect.co.nz

Evidence of any income you receive. For example, recent payslips (you need to provide at least four weeks of income and computer generated payslips must be signed by your employer), a letter or statement from your employer, a detailed statement from your accountant or Inland Revenue (this can be printed from your myIR but must show the web address), details of rental income and expenses, taxable boarder income, or a tax assessment notice of the country or countries you receive income from stating your income before tax, or a letter from your bank(s), social security or pension provider, or any other organisation you get income from. If your income hasn't changed since the last complete financial year you can provide evidence of this income.

First parent	Second parent
<input type="checkbox"/>	<input type="checkbox"/>

Evidence of your nil taxable income – if you don't have any income. For example, a letter or statement from Inland Revenue or your accountant, as well as a statement detailing how you support yourself on nil income. If you receive financial help from someone else, they need to complete a written statement confirming that they have been financially supporting you, and the amount of financial assistance you have received from them - this statement must also state if the assistance received is a gift or a loan that needs to be repaid.

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

Birth certificates or passports for other full-time students. You won't need to provide these if StudyLink has already seen them.

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

Parents' declaration

The information I have provided is true and I have not left anything out. I understand 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. I have read (or had explained to me) and understood the Privacy Statement contained in the application form.



First parent's signature

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



Second parent's signature

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

Information for parents

Definition of a parent

A parent includes a natural or adoptive parent, step-parent¹, partner² of a parent, some caregivers, and any other person acting in place of a parent³ 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.

Income definitions

For more information on Parental income, please refer to 'Parents' income – Student Allowance definition' in the glossary section on the StudyLink website: 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 Payment, 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.

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 ongoing 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.

Continued...

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

² A partner is a person who is married, or in a civil union or de facto relationship with, the parent of the student.

³ A person acting in place of a parent can include grandparents, other relatives (including whāngai), and some current and former caregivers and guardians of the student.

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 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 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.

Part 3: Accommodation details for sole parents

This section needs to be completed if you are a sole parent and have accommodation costs while studying.

The documents we need to see are listed on page 31.

1. Did your study start on or after 1 July 2015?

This application only applies to study that started on or after 1 July 2015. If your study started before this date, you cannot receive this assistance.

☐ Yes ☐ No (Go to Student's obligations and declaration on pages 30 and 31)

2. Do you have a partner? ☐ Yes (Go to Part 4: Partner's form) ☐ No

3. Do you live with anyone over the age of 18? ☐ Yes ☐ No

If yes, who else do you live with?

First name	Surname	Relationship to you

4. Do you have any cash assets?

By 'cash assets' we mean anything you own that can be easily converted to cash, such as savings, shares, stocks, loans to others, or the net equity of property you own but don't live in.

☐ Yes ☐ No (Go to Q5)

If yes, please give us the details of your cash assets:

Type of asset	Owner of asset (you, your partner or both)	Value	Money owing (if any)
		\$	\$
		\$	\$
		\$	\$

5. While studying, will you be:

☐ Renting (Go to Q7) ☐ Boarding (Go to Q8) ☐ Living in a house you own (Go to Q9) ☐ Living in a hostel

Hostel – complete this question only if you are living in a hostel.

6. What is the name of the hostel you will be living in?

Renting – complete this question only if you are renting.

7. Will you be living in a public housing property? ☐ Yes ☐ No (Go to Q7a)

If yes, will your name be on the tenancy agreement?

☐ Yes (Go to Student's Obligations and Declaration on pages 30 and 31) ☐ No (Go to Q7a)

If yes, you won't be able to get an Accommodation Benefit.

7a. What is the total amount of rent paid each week for the property? \$

7b. How much of this total amount do you pay for you and your family? \$

7c. Do you pay water rates? ☐ Yes ☐ No (Go to Q7g)

7d. How much do you pay? \$

7e. How often is the payment? e.g. weekly, fortnightly, monthly

7f. Name of company?

7g. Who do you pay rent to?

Name	Address	Phone

 We may ask for evidence of your rent – for example a rent book or tenancy agreement.

Boarding – complete this question only if you are boarding.

8. What is the total amount of board you pay each week for you and your family? \$

Include all expenses such as power, phone and food.

8a. Who do you pay board to?

Name	Address	Phone

 We may ask for evidence of your board – for example a letter from your landlord.

Own home – complete this question only if you live in a house you own.

9. Please give us details of the payments you make for your home:


Only include mortgages you used to buy or alter your home. Include both interest and principal. List any other mortgages such as second mortgage or revolving mortgage. Do not include contents insurance.

	Name of provider	How often do you pay? e.g. weekly, fortnightly, monthly	Amount
First mortgage			\$
Other mortgage			\$
Mortgage insurance			\$
Rates			\$
Ground lease			\$
Water rates			\$
Body corporate fees			\$

9a. Have you received a rates rebate?

☐ Yes Amount \$ Rating Year (1 July) 20 to (30 June) 20 ☐ No

9b. What was the total cost of necessary repairs and maintenance to your home in the last 12 months? \$

 We need evidence of all the payments you make for your home – for example, a verified copy of a bank statement showing your payments or verified copies of receipts (unless StudyLink has already seen it).

Part 4: Partner's form

This section is to be completed by the partner of the person applying for the Student Allowance.

A partner is someone you are in a recognised relationship with. This could include your spouse, civil union partner, or someone with whom you have a de facto relationship (where you live together as a couple in a relationship in the nature of marriage or civil union). For the Student Allowance, if you or your partner are under 24 years old, and you do not have children in your care, you do not need to complete this form. If you are in a de facto relationship where you or your partner is aged 16 or 17 years old, the parents of the 16 or 17 year old, or a Family Court judge, must give their consent for the de facto relationship to be a recognised relationship for Student Allowance purposes.

1. What is your client number?

If you have received assistance from StudyLink or Work and Income before, write your client number here if you know it. This number can be found on your Community Services Card if you have one.

Client number

2. What is your full name?

First name	Middle name(s)	Surname or family name
<input type="text"/>	<input type="text"/>	<input type="text"/>

3. What is your legal name as it appears on your birth certificate or passport? (If different from above)

First name	Middle name(s)	Surname or family name
<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Have you ever been known by any other name(s)?

☐ Yes ☐ No

If yes, please write them below:

First name	Middle name(s)	Surname or family name	Maiden name? Yes/No
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

5. What date were you born?

Day Month Year



We need to see a verified copy of your birth certificate or passport (unless StudyLink has already seen it).

6. Are you:

☐ Male ☐ Female ☐ Gender diverse

You need to let us know if anything changes in your personal situation because it could affect your payments.

7. What is your Inland Revenue (IRD) tax number?

If you have an IRD number with less than nine digits, please insert zero(s) in front of your IRD number. If you don't have one, you need to get one from Inland Revenue by calling **0800 22 77 74**, or you can download a form at ird.govt.nz.

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8. Do you live with the student?

☐ Yes ☐ No

If no, where do you live?

Flat/House number	Street address		
Suburb	City	Post code	Country
			New Zealand

8a. Are you (or will you be) a tenant living in a public housing property?¹

☐ Yes ☐ No

If yes, will your name be on the tenancy agreement?

☐ Yes ☐ No

If yes, you may not be able to get an Accommodation Benefit.

9. How can we contact you?

Phone	Mobile ²	Fax	Email ²

10. Were you born in New Zealand?

☐ Yes (Go to Q11) ☐ No

10a. What country were you born in?


10b. Are you a:

☐ Residence class visa holder³ ☐ Protected person⁴ ☐ New Zealand citizen

☐ Other (Provide details eg. Refugee)

If you are a residence class visa holder or New Zealand citizen, when were you granted residency/citizenship?

Day Month Year

 We need to see a verified copy of your birth certificate, passport or letter from Immigration New Zealand to prove your residence (unless StudyLink has already seen it).

¹ Public housing properties are provided by Kāinga Ora and approved community housing providers.

² If you give us your mobile number or email address we may use these to send you text messages or emails to let you know about important changes, appointment reminders or that it's time to reapply if you're continuing with your studies. This must be your own mobile number or email address. Do not give the contact details of your education provider.

³ A residence class visa holder is someone who is entitled to reside in New Zealand indefinitely and holds a residence class visa under the Immigration Act 2009 (holders of resident permits and returning resident's visas (RRVs) granted under the Immigration Act 1987 are deemed to hold a residence class visa under the Immigration Act 2009). If you are an Australian citizen or Australian permanent resident please choose 'residence class visa holder'.

⁴ As defined under sections 130 and 131 of the Immigration Act 2009.

10c. If you are a residence class visa holder, were you granted residency under sponsorship?

☐ Yes

☐ No

10d. When did you come to New Zealand to live?

Day

Month

Year

11. Do you usually live in New Zealand?

This means that you consider New Zealand your home, you are a legal resident, normally live here and intend to stay permanently.

☐ Yes

☐ No

12. The following information is only needed for statistical purposes. It's up to you whether you answer this question. We'd appreciate it if you would tick the ethnic group(s) you most identify with.

☐

NZ European

☐

Other European

☐

NZ Māori

☐

Samoan

☐

Cook Island Māori

☐

Tongan

☐

Niuean

☐

Tokelauan

☐

Fijian

☐

Pacific Island – Other

☐

Southeast Asian

☐

Chinese

☐

Indian

☐

Asian – other

☐

Middle Eastern

☐

Latin American

☐

African

☐

Other (please provide details)

If you are NZ Māori, which iwi do you belong to?

13. Are you studying now or do you intend to study at the same time as the student?

☐ Yes

☐ No (Go to Q14)

13a. Will you be studying more than half the work of a full-time course?

If you're unsure what that means, contact your education provider.

☐

Yes (You need to apply for your own Student Allowance)

☐

No (Go to Q14)

13b. When does your course start and finish?

Start

Day

Month

Year

Finish

Day

Month

Year

14. At the time the student starts studying, will you be getting any income?

Income is any money you get from any source, taxable or non-taxable. This could include, but is not limited to, wages, salary, termination payment, bonus pay, holiday pay, child support (private arrangement or through Inland Revenue), maintenance payments, paid parental leave, interest from savings and investments, dividends from shares, income from a family trust, farm or business, income from boarders or rent, superannuation, overseas benefits and pensions, weekly accident insurance payments, some scholarships, any indirect monetary benefits you get such as free board or shares in a business, and any other income that you have or may deprive yourself of. Please don't include your Student Allowance, Student Loan or Family Tax Credit as income.

☐

Yes

☐

No (Go to Partner's obligations and declaration on page 29)

14a. What type of work do you do?

☐

Full-time

☐

Part-time

☐

Voluntary

☐

Self-employed

☐

Casual

14b. When did you start this job?

Day

Month

Year

14c. Please give us details of your income per week before tax:

By 'per week' we mean from each Monday to Sunday.

Type of income	Weekly income before tax	Hours worked each week	Start date	End date	Employer's name or income source
	\$		/ /	/ /	
	\$		/ /	/ /	

Employer's trading name (if different)	Business address	Suburb/City/Town
1.		
2.		

**We may ask for evidence of your income.**

Remember to let us know every time your income changes.



Student Allowance is assessed based on the income you and the student declared at the time of application. If your income changes at any time, you must let us know straight away as it could affect your and your partner's payments. Student Allowance payments for any week are affected by the income you earn in that week. We may ask for evidence of your income at any time in the future. We may also check your income with Inland Revenue.

Remember to read your obligations, then sign and date your declaration on page 29.

**Partner's checklist**

All documents sent to StudyLink must be a verified copy. A verified copy is a copy of the original document which has been signed and dated by someone like a Solicitor/Lawyer, Notary Public, Court Registrar, an approved person at an education provider, school principal, StudyLink or Work and Income staff member or Justice of the Peace (listed in the Yellow Pages) who can confirm that the copy is the same as the original. They must print their name and title on each page and write that it is a true copy and sign it.

Documents you need to provide if the student is applying for the first time and StudyLink hasn't seen them before:

- ☐ Your birth certificate or passport.
- ☐ Evidence of your immigration status – if not born here. For example, your passport, residency documents, certificate of citizenship or letter from Immigration New Zealand.
- ☐ Evidence of any name change you've had. For example, marriage certificate or deed poll papers.

Partner's obligations

When the student gets financial help from us you also have obligations to meet. If you don't meet them, your and/or the student's payments could stop – and in some cases you and/or the student could be prosecuted.

Here are your obligations.

If things change

You must tell us straight away if you:

- have a change in your work situation (such as starting part-time, casual or full-time work)
- intend to travel overseas
- have changes to your living situation, including:
 - starting or ending a marriage, a civil union or a de facto relationship with someone or
 - separation or
 - a change in the number of children you support
- have changes to your income in any week or changes to your financial circumstances
- have changes to your personal details (such as name, address or bank account number)
- become self employed or start to run a business
- are imprisoned or held in custody on remand
- are admitted to or discharged from hospital
- have any other changes that may affect whether your partner can get a Student Allowance.

Be honest with us

When you sign this form you are acknowledging that the information you give us is true and you have not left anything out. You understand that your and/or the student's payments may be reviewed and cancelled if you:

- make a false statement or
- don't answer all the questions fully or
- don't tell us about changes in your circumstances that could affect your (and the student's) eligibility and/or entitlement

If this happens, you understand that you and/or the student will have to pay back the total amount of any overpayment plus collection costs, and you and/or the student may be prosecuted.

Partner's declaration

The information I have provided is true and I have not left anything out. I have read and understood my obligations as set out above. I understand that I could be prosecuted if I make a false statement. I have read (or had explained to me) and understood the Privacy Statement contained in the application form.



Partner's signature

Day

Month

Year

Student's obligations

When you get financial help from us you need to meet all your obligations. If you don't, your payments could stop – and in some cases you could be prosecuted. Here are your obligations.

If things change

You must tell us straight away if either you or your partner:

- have a change in your study situation (such as withdrawing from a course or dropping a paper)
- have a change in your work situation (such as starting part-time, casual or full-time work)
- intend to travel overseas
- have changes to your living situation, including:
 - starting or ending a marriage, a civil union or a de facto relationship with someone or
 - separation or
 - a change in the number of children you support
- have changes to your income in any week or changes to your financial circumstances
- have changes to your personal details (such as name, address or bank account number)
- become self employed or start to run a business
- are imprisoned or held in custody on remand
- are admitted to or discharged from hospital
- have any other changes that may affect whether you can get a Student Allowance.

Be honest with us

When you sign this form you are acknowledging that the information you give us is true and you have not left anything out. You understand that your payments may be reviewed and cancelled if you:

- make a false statement or
- don't answer all the questions fully or
- don't tell us about changes in your circumstances that could affect your (and your partner's) eligibility and/or entitlement.

If this happens, you understand that you or your partner will have to pay back the total amount of any overpayment plus collection costs, and you may be prosecuted.

The easiest way to tell us about your changes is using MyStudyLink at studylink.govt.nz



Student's checklist

All documents sent to StudyLink must be a verified copy. A verified copy is a copy of the original document which has been signed and dated by someone like a Solicitor/Lawyer, Notary Public, Court Registrar, an approved person at an education provider, school principal, StudyLink or Work and Income staff member or Justice of the Peace (listed in the Yellow Pages) who can confirm that the copy is the same as the original. They must print their name and title on each page and write that it is a true copy and sign it.

The best way to send your documents to us is online using connect.co.nz. Please remember to include your name and client number with any documents that you send to us. For more information visit connect.co.nz

You need to provide any information we need before the end of your course or your Student Allowance application may be closed.

Documents you need to provide if you're applying for the first time:

If it's not the first time you're applying and you've provided a document to StudyLink before, we probably won't need to see it again.

- ☐ Your birth certificate or passport.
- ☐ Evidence of your immigration status – if not born here. For example, your passport, residency documents, certificate of citizenship or letter from Immigration New Zealand.
- ☐ Evidence of any name change you've had – if the name you're applying under is different from the name in the documents you're providing. For example, marriage certificate or deed poll papers.
- ☐ Evidence of your bank account. For example, a pre-printed deposit slip or statement with your name, bank, branch and account number.
- ☐ Full birth certificates for any children in your care.
- ☐ 16 and 17 year olds (not Independent Circumstances Allowance applicants), evidence you have –
 - completed year 13, or
 - attained 42 NCEA level 3 credits or more, or
 - been accepted into a full-time tertiary level course which has an academic entry requirement of 42 or more NCEA level 3 credits, or
 - attained 42 credits or more at level 4 on the National Qualifications Framework.

Student's declaration

The information I have provided in this application is true and I have not left anything out. I have read and understood my obligations as set out on page 30. I understand that if I make a false statement or don't tell StudyLink of a change in any circumstances my Student Allowance payments may stop. If this happens I understand that I will have to pay back any overpayments plus collection costs, and I could be prosecuted. I have read (or had explained to me) and understood the Privacy Statement contained in the application form.



Student's signature

Day

Month

Year

Appointing an agent

If you want to give someone else authority to enquire about your application you'll need to complete an Appointment of Agent form. Visit our website studylink.govt.nz to download this form.

Has anyone else who needs to complete this form done so?

The earliest we can pay you is in the second week of your course.

MyStudyLink

get it all done online

- check out what financial assistance you may be able to get
- apply for your student finances
- check your Student Allowance and Student Loan application status
- view and update your personal details
- change the amount of your living cost payments and apply for your course-related costs
- view details of your next payment and previous transactions
- view your mail
- view and accept your Student Loan Contract.

How to contact us

Website: **studylink.govt.nz**

Phone: **0800 88 99 00**

Using Connect

A quick and easy way to send us your documents

1. Create an account at **connect.co.nz** with your RealMe login
2. Upload your verified documents
3. Submit to StudyLink