

Information required under section 17GB of the Tax Administration Act 1994

There are two sections to complete.

The first section asks for your personal details. This information will ensure we correctly match your survey response to you. We are wanting to send future correspondence about this project by email. If we do not already have an email address for you, we are asking you to provide one.

The second section asks for details of your current partner (if you have one) and any dependent children. We need this information as the high-wealth individuals research project will base its calculations of income on income derived by the family unit. This is similar to how income is defined for other research that uses information from Stats NZ's Household Economic Survey. The family definitions are similar to those used in the Household Economic Survey.

If you do not know the information that is requested or if it is not applicable, please indicate this.

Section 1 – Your Personal Details

1. a. First name
- b. Middle name(s)
- c. Surname
- d. Please provide any other names that you have ever been known by (e.g. maiden name)
2. Date of birth
3. IRD number
4. Any other Tax Identification Number(s) you have and country of issue
5. a. Please provide the email address (if you have one) that you would like future correspondence for this research to be sent to
- b. If this email address is not already included in your Inland Revenue customer record, can it be added?

Section 2 – Your Family Details

6. Do you currently have a partner?
 - *This is a person who is related to you through a marriage or civil union or through a de facto relationship. If you have separated but remain married, then do not include them as your partner below.*
 - *A de facto relationship is where two people:*
 - *currently share a mutual concern for each other and are emotionally committed for the foreseeable future, and*
 - *are not married or in a civil union, and*
 - *have a degree of economic, social and emotional interdependence through*
 - *often living at a shared address, or*
 - *sharing of household responsibilities, bills, and/or financial accounts, or*
 - *others viewing you as a couple.*

7. Please provide the following information about your partner. These details will be used to contact your partner to ask them for information needed for the high-wealth individuals research project. If there is insufficient information to contact your partner, we will need to contact you again about this.
- a. Partner's first name
 - b. Partner's middle name(s)
 - c. Partner's surname
 - d. Please provide any other names that your partner has been known by (e.g. maiden name)
 - e. Partner's date of birth
 - f. Partner's IRD number
 - g. Partner's other Tax Identification Number(s) and country of issue
 - h. Partner's postal address
 - i. Partner's phone number
 - j. Partner's email address
8. Do you currently have any dependent children?
- *A dependent child is a child of you and/or your partner from a biological, adoptive or fostering relationship who is:*
 - Aged 17 or under, and
 - Not in full time paid employment (regularly working 30 hours or more per week), and
 - Not married, in a civil union or in a de facto relationship themselves, and
 - You regard as being part of your household due to them, for example:
 - *often living at a shared address with you, or*
 - *sharing household activities with you, or*
 - *being viewed as your dependent child by others.*
9. How many dependent children do you have?
10. Please provide the following information in respect of any dependent child (starting with the eldest) who, to the best of your knowledge, currently has net assets in their own name in excess of \$1,000,000 or in the 2021 income year had taxable income in excess of \$1,000,000. You are not required to undertake a valuation exercise to answer this question.
- a. Child's first name
 - b. Child's middle name(s)
 - c. Child's surname
 - d. Child's date of birth
 - e. Child's IRD number



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Section 17GB of the Tax Administration Act 1994

Section 17GB - Commissioner may require information or production of documents for tax policy development

- (1) A person must, when notified by the Commissioner that the person is required to provide information under this section, provide any information that the Commissioner considers relevant for a purpose relating to the development of policy for the improvement or reform of the tax system.
- (2) The Commissioner must not use, as evidence in proceedings against a person, information provided by the person in response to a notice under subsection (1).
- (3) Subsection (2) does not apply to any information subsequently obtained by the Commissioner under another section of this Act.