

Trusts

Trusts can affect entitlement to benefit assistance. This page contains information to assist you when a client discloses a Trust.

An Overview Of Trusts

This document is designed to give you an understanding of how a Trust is formed and how it may affect benefit applications.

[Overview of Trusts](#) (Word 112.5KB) s9(2)(h) OIA

Trust Questionnaire

Trusts can affect entitlement to benefit assistance. Where one exists you may need assistance from Income Determination. When forwarding files for advice, please ensure the client has completed a Trust questionnaire and supplied the specified documents.

The client will often seek an explanation from you as to why this information is required. To assist in their understanding, we suggest you also provide them with the document Income for Benefit Purposes at the same time as the questionnaire. This document explains how the Ministry views income for benefit purposes.

A completed Trust questionnaire and file cover sheet are required before sending files to us for assistance.

[Trust Questionnaire](#) (Word 73.18KB) [<http://doogle/documents/resources/helping-clients/procedures-manuals/core-procedures/income/trust-questionnaire-2014.docx>]

[Income for Benefit Purposes](#) (Word 122KB) [<http://doogle/documents/resources/helping-clients/procedures-manuals/core-procedures/income/2007-02-07-benefit-income-v1.doc>]

[Case Referral Cover Sheet](#) (Word 50.5KB) Out of scope

Accountants - Financial Determination Contacts

The Contact Page explains who we are, what we do and how to forward a case to us.

[To the Accountants - Financial Determination Contact Page](#) [<http://doogle/business-groups/helping-clients/work-and-income/who-we-are/our-teams/income-determination-team.html>]

Content owner: [Work and Income Financial analysts - Income determination](#) Last updated: 20 April 2015