

Funeral Grant Application



Work and Income
Te Hiranga Tangata

A service of the Ministry of Social Development

CLIENT NUMBER (of person applying)

Please read this before you start

A funeral grant may help with some of the funeral costs of someone who has died.

You may get a Funeral Grant if you are:

- the partner, spouse, child, parent or guardian of the deceased person
- arranging the funeral of someone with no partner, spouse or child.

The Funeral Grant is income and asset tested. The test depends on whether the deceased has a surviving partner or dependent child, or if the deceased is a child.

The deceased person must normally have lived in New Zealand.

Please complete all questions – if not applicable write N/A.

What should I bring?

You will need to complete an application and provide:

- proof of death, eg a death certificate
- proof of funeral expenses
- proof of assets as at the date of death, eg bank statements for all accounts
- proof of income – if you are the partner or parent of the person who has died
- identification for yourself.

Privacy Statement

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

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

The Privacy Act 1993 requires us to tell you that:

- The information you give us is collected under the authority of the legislation administered by the Ministry of Social Development.
- The information will be held by the Ministry of Social Development.
- The information is collected for the purposes of the legislation administered by the Ministry of Social Development (including Work and Income, Child, Youth and Family and other service lines of the Ministry), and in particular for:
 - granting benefits and other assistance under the Social Security Act 1964
 - statistical and research purposes
 - providing advice to Government
 - care and protection needs of children
 - providing support and services for you and your family
 - providing education related services.
- Work and Income may contact health providers to verify any health related information you give us.
- Other information that you give us on your skills, aspirations, family circumstances etc, and that is not required to assess your entitlement to a benefit may be used to provide a better service to you by the Ministry of Social Development.
- The information you give us may be compared with information held by Inland Revenue, the Ministry of Justice, the Department of Corrections, the New Zealand Customs Service, the Department of Internal Affairs, the Accident Compensation Corporation, Housing New Zealand Corporation, Ministry of Health and Immigration New Zealand. It may also be compared with social security information (for example, pension or benefit information) held by other governments (including Australia and the Netherlands).
- Under the Tax Administration Act 1994, if you have dependent children, the information you give us may be shared with Inland Revenue for the purpose of administering Working for Families Tax Credits. Inland Revenue may also:
 - use the information for the purposes of child support, student loans and taxation
 - disclose it to the Department of Labour, Statistics New Zealand, the Ministry of Justice, the Accident Compensation Corporation, and the Ministry of Education
 - disclose your personal information to your partner.
- Under the Privacy Act 1993 you have the right to ask to see all information we hold about you, and to ask us to correct that information.
- You are not required to give us information, but if you do not give us all the information we ask for, your application for benefits may be declined.

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Name

1. What is your full name?

First name(s)

Surname or family name

2. What is your name on your birth certificate (if different from above)?

First name(s)

Surname or family name

Q3 note: Give any other names, not already stated above, you use now or have used in the past. These might include married names, English names, changes by deed poll, or aliases.

3. Are you or have you been known by any other name(s) including married names or aliases?

No

Yes ▶ Please provide details below:

1.
2.

4. Are you: Male Female

Birth date

5. What is your date of birth?

Day	Month	Year

Address

Q6 note: If you live in a rural area, a house number could include:

- RAPID number
- fire number
- emergency services number.

Q7 note: Mailing address includes:

- postal box (PO Box)
- rural delivery details
- C/O address.

6. Where do you live?

Flat/house no.

Street name

Suburb

City

7. What is your mailing address (if different from above)?

Contacting you

8. How else can we contact you?

Description

Details

Try first ✓

Home phone	()	
Mobile phone	()	
Work phone	()	
Email		

Details of the person who has died

Q9 note: Please bring the person's death certificate. If you don't have it, please get in touch with us as we may be able to obtain verification.

If the person who died was a stillborn child please bring a birth certificate, or letter from an Obstetrician or midwife or the hospital discharge report.

9. What was the name of the person who has died?

First name(s)

Surname or family name

10. What was their date of birth?

Day	Month	Year

Details of the person who has died – continued

Q12 note: Please provide the town or city and the country.


Q16 note: Examples for this may be:

- a solicitor
- a public trustee.

Q17 note: If the person who died was single, please provide details of any assets the person may have had.

Examples of assets include:

- money in bank or savings organisation
- money lent to other people or organisations
- money in Bonus Bonds, shares, debentures or government stock
- house
- car
- leisure boat
- caravan
- land or buildings, eg holiday homes
- family trust.

 You may be required to show proof of these details.

Q19 note: We need to see the funeral account.

Q20 note: Examples of this may be:

- cost of casket
- newspaper notice costs
- hearse fees
- compulsory fees for the purchase of a burial plot
- cremation fees
- professional services to prepare the deceased for cremation or burial such as embalming.

11. When did they die?
Day Month Year

12. Where did they die?

13. Did this person die as a result of an accident?
 No Yes ▶ Please discuss with Work and Income

14. Did the person who died ever receive any type of assistance from Work and Income or have a Community Services Card or SuperGold Card?
 No Yes ▶ Client number:

15. Did they have any children in their care or that they supported financially?
 No Yes ▶ Please provide details below:

Child's full name	Date of birth
1.	/ /
2.	/ /
3.	/ /

16. Who will administer the estate? Please provide their name and address below:

17. Please provide details of bank account numbers, bank account balances and any other cash assets as at the date the person died:

Type of asset	Amount
<input type="text"/>	\$
<input type="text"/>	\$

18. Did the person who has died have in their estate any superannuation, pension or life insurance fund, or a prepaid funeral plan?
 No Yes ▶ Please provide details below:

Amount
\$
\$

19. What is the name and address of the funeral director?

20. What expenses are you applying for?

Expense	Amount
<input type="text"/>	\$
<input type="text"/>	\$
<input type="text"/>	\$
<input type="text"/>	\$
<input type="text"/>	\$
<input type="text"/>	\$

21. Was the person who died:
 Widowed Single Separated Divorced
 In a relationship Married In a civil union A dependent child

22. How are you related to the person who died?
 Parent Partner Other ▶

Partner's/parent's personal details


Q28 note: Please give the gross (before tax) amount.

Q29 note: Examples of income from other sources:

- wages or salary
- accident compensation
- farm or business income (include drawings)
- self employment
- interest from savings or investments
- dividends from shares
- income from rents
- redundancy or termination type payments
- Child Support
- maintenance payments
- boarders
- Student Allowance, scholarship or Student Loan living cost payments
- any other income, eg family trusts, overseas payments.

Q30 note: Examples of cash assets:

- money in bank or savings organisation
- money lent to other people or organisations
- money in Bonus Bonds, shares, debentures or government stock
- house
- car
- leisure boat
- caravan
- land or buildings other than your home, eg holiday homes
- family trust.

 You may be required to show proof of these details.

Questions 23–30 must be completed by:
– the partner of the person who has died, or
– the parent of a dependant child who has died.

23. Where were you born?

24. If you were not born in New Zealand, do you have:

NZ citizenship Permanent residence Other ▶ Please provide details below:

25. When did you arrive in New Zealand?

Day Month Year

26. Are you in employment?

No Yes ▶ Is the job: Full-time Part-time Casual
 Seasonal Self-employment

27. Who do you work for? (if self-employed, please provide your business name)

Please provide the name, address and phone number.

28. How much is your gross annual income? \$

29. Did you get income from any other source in the last 52 weeks?

No Yes ▶ Please provide details below:

Source of income	You	Your partner	Joint
<input type="text"/>	\$	\$	\$
<input type="text"/>	\$	\$	\$
<input type="text"/>	\$	\$	\$

30. Do you have any assets?

No Yes ▶ Please provide details below:

Type of asset	You	Your partner	Joint
<input type="text"/>	\$	\$	\$
<input type="text"/>	\$	\$	\$
<input type="text"/>	\$	\$	\$

Partner's/Parent's statement

I am aware of and understand the Privacy Statement contained in this application.
The information I have given is true and complete.

Partner's/Parent's name (print)

Partner's/Parent's signature

Date

Day Month Year

Applicant's statement

I am aware of and understand the Privacy Statement contained in this application.
The information I have given is true and complete.

Applicant's name (print)

Applicant's signature

Date

Day Month Year

OFFICE USE ONLY

Funeral Grant on Death of a Child/Spouse

BLOCK ONE

- 1a Is a lump sum payable under clause 64 of Schedule 1 of the Injury Prevention, Rehabilitation, and Compensation Act 2001 in respect of the death?
 No Yes ▶ There is no entitlement to a funeral grant
- 1b Is a War Funeral Grant in accordance with regulation 45 of the War Pensions Regulations 1956, or a Veteran's Pension Lump Sum Payment on Death in accordance with section 74A and Schedule 12 of the War Pensions Act 1954, payable?
 No Yes ▶ There is no entitlement to a funeral grant

BLOCK TWO Assets of Estate and Surviving Spouse/Parents

- 2a Terminal Benefit \$
- Gross value of estate assets \$
- Deduct administrative expenses \$
- Deduct the value of any Maori land \$
- Deduct any unrealisable assets \$
- Value of estate assets \$
- 2b Assets of spouse/parents excluding those non-assessable assets in section 61 \$
- Less assets exemption of four times the married rate of Invalid's Benefit \$
- Equals value of surviving spouse/parents assets \$
- Add the value of the estate assets \$
- Total contributing assets \$
- 2c Total allowable funeral expenses \$
- Less total of assets in 2b \$
- Deficiency/Surplus \$
- GRANT PAYABLE \$

BLOCK THREE Income of Spouse/Parents

Complete Block Three only if the assessment in Block Two shows a deficiency

Limit of benefit and income \$

Income of spouse/parents \$

Is income below the limit of benefit and income?

- Yes No ▶ There is no entitlement to a funeral grant

BLOCK FOUR Case Manager's Checklist

- Check for debt (using Single View of Debt on UCVII)
- Letter to the administrator of the estate about the debt
- Forward a copy of funeral grant to the Collection Unit if the debt is \$500 or more

Recommendation and Decision

A funeral grant of \$ is approved.

Payee:

Address:

Application declined because:

Letter issued setting out reasons

Processor's signature

▶

Day Month Year

Authenticator's signature

▶

Day Month Year

10% 100% Critical data

Checker's signature

▶

▶

Day Month Year

Bring up

B

F

Day Month Year

