



Parent Retirement Category Guide

a guide to applying for residence in New Zealand

Information about this guide

The purpose of this guide is to help you complete the Permanent Retirement Category Residence Application (INZ 1170).

Boxes like this **B2** refer to questions in the application form.

False information

If you supply false information or omit relevant information from your application form, your residence application may be declined. Please be aware that we may verify any documents you provide.

Investment funds

If your application is approved you must retain your investment funds in acceptable investment(s) in New Zealand for four years.

How to apply for residence

Complete the form in full

You must complete all the questions in the form unless the form specifically directs you to another question or a section further on. If a question does not apply to you, mark it 'N/A' or 'not applicable'. If you don't answer a question, we may send the incomplete form back to you.

Complete the form in English.

Enclose supporting documents

You will need to provide us with documents that support the claims you have made in the application form. This guide lists the type of documents we will accept as evidence.

You must also attach two identical passport-size (4.5cm by 3.5cm) colour photographs taken within the last six months for each person included in your application. Write the person's name on the back of each photograph.

Enclose the fee and immigration levy

Ensure you enclose the correct application fee and immigration levy.

Submit your form

To find out how much to pay, payment method and where to send your application see: www.immigration.govt.nz/fees.

Documents

Certified copies

All documents should be either originals or certified copies. If you send certified copies, Immigration New Zealand may ask for originals at a later date. Certified copies are photocopies that have been stamped or endorsed by a person who confirms that the copy is a true copy of the original. The person who certifies the copy must be authorised to do so by law in your home country or in New Zealand (eg a Justice of the Peace, notary public, lawyer or court official).

Translations

If any of your documents are not in English, you must have them translated into English by a person who is familiar with both English and the language in which the documents are written. Any translation provided must:

- not be made by a family member or a person with an interest in the outcome of the application
- be certified as a correct translation made by a person familiar with both languages and competent in translation work
- be prepared and certified by a recognised private or official translation service
- be on the official letterhead of the translation service
- bear the stamp or signature of the translator
- be accompanied by the original documents or certified copies, and
- be paid for by the applicant.

Translations may be prepared by:

- the Translation Service of the New Zealand Department of Internal Affairs
- language departments of secondary schools or universities
- reputable people within the community who are known to translate documents accurately
- embassies, if the translation is endorsed with the appropriate embassy seal, or
- any other recognised or official translation service.

Importing your car, boat, and/or household items

You may be able to bring your car, boat, and/or household items to New Zealand free of Customs charges. For detailed information on restrictions, and to find out if you must pay Customs charges, see the New Zealand Customs Service website www.customs.govt.nz. For enquiries, email feedback@customs.govt.nz, or telephone:

- 0800 428 786 (within New Zealand)
- +64 9 300 5399 (outside New Zealand).

Tax obligations while residing in New Zealand

If you are planning to be self-employed, operate a business or buy or sell real estate in New Zealand, you will need an IRD number. This is administered by Inland Revenue, New Zealand's tax service. You can apply for an IRD number online at www.ird.govt.nz/irdnum-individuals.

Inclusion of your partner in your application

If you submit a residence application and you hold a work visa and your partner/spouse holds a temporary visa linked to your work visa, **they must be included in your application. They also cannot be subsequently removed** from your application. Failure to do so may result in your application not being accepted.

Additional information

Make sure you keep us informed of any change in your circumstances or in the information you have provided. You may provide additional information or documents after your application has been accepted for consideration, but you must do so before we make our final decision. Once a final decision has been made on your application, we won't accept any further information or documents.

New Zealand Business Number

Where you enter the details of an organisation or business, the form will have a field for a New Zealand Business Number (NZBN). The NZBN should have 13 numbers and always begins with 94. An NZBN is a unique identifier for all organisations operating in New Zealand. You do not have to fill in the NZBN if you do not know what it is or if the organisation you are providing details about is based outside New Zealand. You can find more information about the NZBN, including finding an NZBN for a specific organisation, by going to www.nzbn.govt.nz.

Completing Section A Principal applicant's personal details

The principal applicant is the main person who will be assessed against the Parent Retirement Category instructions.

A9 Partnership status

Tick 'Married/in civil union' if you are legally married or in a legal civil union with your partner. Tick 'Partner' if you have a de facto partner (ie a partner with whom you live, but you are not legally married to them or in a legal civil union with them).

Where the term 'partner' is used elsewhere in the form or guide, it includes both legal and de facto partners.

A10 Provide a certified copy or an original of your full birth certificate.

A11 Taxation and social security numbers

A12 If you have taxation and/or social security numbers in your own country, please provide evidence with your application.

Completing Section B Contact details

You can complete and submit your residence application yourself or you can ask another person – such as a friend, lawyer, or immigration adviser – to help you. We refer to people who help you in this way as your 'adviser'. We give all applicants equal treatment so you are free to choose whether to use an adviser.

Please be aware of the following if you do decide to use an adviser.

- You can give your own address or your adviser's address as our point of contact at **B2**.
- If you give your adviser's address at **B2** and indicate at **B3** that you want Immigration New Zealand to communicate only with this person, we will send them all correspondence about your residence application. However, there may be times when we want to work directly with you to seek further information or evidence about the information you have provided in your residence application.
- If you stop using the services of your adviser, or begin using the services of another adviser, you will need to tell your former adviser and tell your assigned case officer in writing (letter, fax or email) or we will continue to deal with your former adviser. If you are changing your immigration adviser, please use the form Immigration Adviser Details (INZ 1160).
- You are responsible for all information and documents you submit with your residence application as well as all information and documents that your adviser submits on your behalf.

Completing Section C Your family

You must provide details of ALL your family, whether they are migrating with you or not.

C1 Provide original or certified copies of full birth certificates for each person included in your application.

↓
C3 Partnership status should be described in **A9**.

Completing Section D Your partner

D1 Minimum requirements for recognition of partnerships

↓ You can include your partner in your application, but for your partner to be granted residence as part of your application you must:

D2

- have been living together in a genuine and stable relationship for at least 12 months, and
- both be aged 18 years or older (or have parental/guardian consent if either of you are aged 16 or 17 years), and
- have met before this application is made, and
- not be close relatives according to Schedule 2 of the Marriage Act 1955 or Schedule 2 of the Civil Union Act 2004 (these Acts are available on the internet at www.legislation.govt.nz).

Evidence that you and your partner are living together may include (but is not limited to) original or certified copies of documents showing shared accommodation such as:

- joint ownership of residential property
- joint tenancy agreement or rent book or rental receipts
- correspondence (including postmarked envelopes) addressed to both you and your partner at the same address.

If you and your partner have been living separately for any period during your relationship, you should provide evidence of the length of the periods of separation, the reasons for them, and how your relationship was maintained during the periods of separation. Such evidence may include letters, itemised telephone accounts or email messages.

Evidence that your partnership is genuine and stable may include (but is not limited to) original or certified copies of documents such as:

- your marriage certificate
- birth certificates of any children you have had together
- evidence of communication between you both
- photographs of you both together
- documents indicating public recognition of your partnership
- evidence of you and your partner being committed to each other both emotionally and exclusively, for example:
 - joint decision-making and planning
 - shared parental obligations
 - shared household activities
 - shared companionship/spare time
 - shared leisure and social activities
 - you and your partner appearing to be a couple to outsiders.
- evidence of being financially interdependent, for example:
 - shared income
 - joint bank accounts operated reasonably frequently over a reasonable time
 - joint assets
 - joint liabilities such as loans or credit to purchase real estate, cars, major home appliances
 - joint utilities accounts (electricity, gas, water, telephone)
 - mutually agreed financial arrangements.

D11 Your partner's birth certificate

Please provide an original or a certified copy of your partner's full birth certificate.

Completing Section E Additional details

The questions in this section apply to every person included in this application.

Completing Section F Character

You and your family need to be of good character to be approved residence under the Parent Retirement Category.

- F1** Every person included in your application **must provide** police certificates from:
- their country(ies) of citizenship (unless they can provide satisfactory evidence to an immigration officer that a police certificate is either not available or is unduly difficult to obtain), and
 - all countries in which they have lived for 12 months or more in the last 10 years, including countries where their stay has been broken by short departures.

Refer to our website www.immigration.govt.nz/policecertificate for information on how to obtain a police certificate. Your police certificates must be less than six months old when we receive your application.

- F6** If you have previously been removed, deported or excluded from any country, you may not meet character requirements and may not be eligible to be granted a visa. You must declare if you have been removed, deported or excluded from any country, excluding New Zealand.

Completing Section G Health

You and your partner (if included) need to be in good health to be approved residence under the Parent Retirement Category.

The questions in this section apply to you and your partner (if included). If you answer Yes to any of the questions [G2](#) to [G5](#), make sure you provide a full explanation of your circumstances so we can assess your medical condition(s). These questions list medical conditions for which a medical waiver cannot be granted. People with these conditions cannot normally be granted a residence class visa.

- G1** You and your partner (if included), must provide a completed *General Medical Certificate (INZ 1007)* and *Chest X-ray Certificate (INZ 1096)* which are less than three months old when we receive your application. If you and your partner (if included) have provided a medical certificate and chest X-ray certificate with a previous visa application within the last 36 months, you do not need to provide further certificates unless:
- the health status of you or your partner (if included), has deteriorated since the previous certificates were issued, or
 - you or your partner (if included), have been requested in writing by an immigration officer to provide updated certificates; or
 - you or your partner (if included), have spent six consecutive months since your last chest X-ray certificate was issued, in a country, area or territory not listed as having a low incidence of TB (see the leaflet *Health Requirements (INZ 1121)* for further information).

Pregnant women are not required to have an X-ray, unless a special report is required.

In most countries we require the medical examinations to be carried out by one of a selected panel of medical practitioners or institutions. The details of these countries and the names and addresses of the approved panels are listed on our website www.immigration.govt.nz/paneldoctors. Alternatively, you can contact your nearest Immigration New Zealand office.

You can find more details of our health requirements and medical waivers in our leaflet *Health Requirements (INZ 1121)*.

Note: If you have a partner who is eligible for inclusion in your residence application and you choose not to include them, or withdraw them from your application before it is approved, you need to be aware of the implications that this will have on any future visa application made by them. If you are granted a resident visa, should your partner apply for a residence class visa or temporary entry class visa in the future as your partner, they will be required to complete a *General Medical Certificate (INZ 1007)* rather than the *Limited Medical Certificate (INZ 1201)*, which is the medical certificate for partners and dependent children of New Zealand citizens and residents. If at the time your partner applies for a visa, an immigration officer determines that they do not have an acceptable standard of health, they will not be granted a medical waiver.

Completing Section H Family requirements

These instructions are for people who want to live permanently in New Zealand and have an adult child who is a New Zealand citizen or residence class visa holder.

You may be considered for residence if your adult child is 18 years or over.

Legal guardians and grandparents

An adult child's legal guardian and their partner will be considered as parents under the Parent Retirement Category if:

- both the adult child's parents died before the adult child turned 20, and
- the legal guardian had custody of the adult child and the right to control the adult child's upbringing before the sponsor attained the age of 20 years.

In the context of the Parent Retirement Category, as a legal guardian your children include:

- the New Zealand citizen or resident adult child, all your biological and adopted children, and any children for whom you are or were legal guardian(s), and
- any of your partner's children (whether or not the partner is included in the application) if that child has lived as part of your family unit for most of the child's life between the time your relationship with your partner began and when the child turned 17.

An adult child's grandparent and their partner will be considered as parents under the Parent Retirement Category if both the adult child's parents are dead. Only one grandparent and their partner may apply under the Parent Retirement Category.

In the context of the Parent Retirement Category, as a grandparent your children include:

- the New Zealand citizen or resident adult child, all your biological and adopted children, and
- any of your partner's children (whether or not the partner is included in the application) if that child has lived as part of your family unit for most of the child's life between the time your relationship with your partner began and when the child turned 17.

Evidence of adult child's relationship to grandparent where adult child's parents are deceased

If you are applying under the Parent Retirement Category as a grandparent, INZ needs to see evidence of your relationship to your New Zealand resident adult child. Evidence is original or certified copies of:

- birth certificates for the adult child and the adult child's parents establishing the relationship of the adult child to the grandparent(s); or
- household registration documents, if these establish the relationship of the adult child to the grandparent(s); or
- evidence of adoption which establishes the relationship of the adult child to the grandparent(s).

Other evidence proving the relationship of the adult child to the grandparent(s) may also be provided by you or may be requested by INZ.

Evidence of legal guardianship where the adult child's parents are deceased

If you are applying under the Parent Retirement Category as a legal guardian, INZ needs to see evidence you are the legal guardian of the New Zealand resident adult child. Evidence of legal guardianship may be any documents showing you had custody of the adult child and the right to control the adult child's upbringing before they reached the age of 20. For example:

- legal documents (such as the parents' will) showing that you were named as the guardian
- a court order granting legal guardianship to you after the death of their parents and prior to them reaching the age of 20 years
- documents showing they lived with you after the death of their parents, and prior to them reaching the age of 20 years
- documents such as medical and school records showing you acted in the role of a parent after the death of their biological or adoptive parents, and before they reached the age of 20 years.

Evidence adult child's parents are deceased

If you are applying under the Parent Retirement Category as a grandparent or legal guardian, you must provide evidence the adult child's parents are deceased. Acceptable evidence includes:

- original or certified copies of death certificates for both parents; or
- where a death certificate is unobtainable, other documents or evidence which prove the parents are deceased, and the date(s) of their death.

A death certificate is considered to be obtainable even if there is a possible delay or expense in obtaining it.

H1 Evidence of your adult child's New Zealand immigration status

↓ You need to prove your adult child is either a New Zealand citizen or a residence class visa holder.

H3 Evidence your adult child is a New Zealand **citizen** can include original or a certified copy of:

- their valid New Zealand passport; or
- their Certificate of New Zealand Citizenship; or
- a recent official statement confirming their citizenship from the Department of Internal Affairs; or
- their New Zealand birth certificate; or
- an endorsement in a foreign passport indicating New Zealand citizenship.

Evidence your adult child is a New Zealand **residence class visa holder** can include original or certified copies of:

- a current New Zealand residence class visa in their passport or travel document; or
- a valid Australian passport.

If your adult child is not currently living in New Zealand, or has spent significant periods of time outside of New Zealand, you must also provide evidence that New Zealand is their primary place of established residence. Acceptable evidence includes:

- correspondence (including post-marked envelopes) addressed to you from New Zealand
- employment references
- rates demands
- income tax returns
- mortgage documents
- documents showing household effects have been moved to New Zealand
- any other documents or evidence that proves that New Zealand is their primary place of established residence.

Section 49(1) conditions

Section 49(1) of the Immigration Act gives INZ the ability to apply conditions to a resident visa. Such conditions can include remaining in New Zealand or keeping funds invested in New Zealand for a period of time. No conditions on the amount of time you must spend in New Zealand are imposed on resident visas granted under the Parent Retirement Category.

Evidence of relationship to your children

INZ needs to see evidence of the relationship between you and all your children, including your New Zealand resident adult child. Evidence of parent(s)' relationship to children is original or certified copies of:

- birth certificates showing the relationship of the children to their parent(s); or
- household registration documents, if these establish the relationship of the children to their parent(s); or
- evidence of adoption which establishes the relationship of the children to their parents.

Other evidence proving the relationship of children to their parents may also be provided or requested by INZ.

Completing Section I Investment funds

You need to have at least NZ\$1 million to invest in New Zealand for four years to be considered for residence under the Parent Retirement Category. In addition to the funds that you intend to invest in New Zealand you must have NZ\$0.5 million as settlement funds and an annual income of NZ\$60,000 at the time of application. If your application is approved in principle, you are not required to transfer your settlement funds.

I2 If you can indicate briefly the kind of investment you propose to undertake, we may be able to provide contacts and information to assist you.

I4 Evidence of annual income may include, but is not limited to:

- earnings from rental properties
- dividends from share portfolios
- interest from investments
- profit from company ownership
- share market trading.

I5 Ownership of funds and/or assets

Funds and/or assets must be owned either by you, or jointly by you and your partner included in your application. If the funds and/or assets you are nominating are partly owned by your partner you may only claim the full value if you meet the minimum requirements for the recognition of partnerships (see Completing Section D: Your partner). If you do not meet the minimum requirements for recognition of partnerships, or you own the funds and/or assets with someone who is not your partner, you may only claim the value of that portion of the funds and/or assets for which you can provide evidence of ownership.

I6 Type and location of investment, settlement funds and income

You need to state the type, location and value of the funds and/or assets that you are nominating. The value should be net of any mortgages or borrowings.

If you are nominating funds, make sure you include the name of the bank/institution in which the nominated funds are held. If you are nominating assets, make sure you describe the nominated assets sufficiently clearly to enable them to be easily identified.

Evidence of funds and/or assets

Acceptable evidence of the value and ownership of funds and/or assets may include:

Cash

- original bank books/statements

Property

- original title deeds, and
- a recent valuation report for your property from an independent registered adviser, and
- mortgage documents or statements showing any liability incurred on the property.

Shares/bonds

- share certificates
- share printout reports
- share trading cards (if applicable)
- a recent statement by a registered share broker or chartered accountant that certifies the current market value of your shares and bonds.

Business

- documents of ownership, or financial interest in, the company/business, and
- an independent valuation by a chartered accountant (or appropriate person), including details of any mortgages, loans, or other financial obligations.

Other assets, eg gold bullion

- evidence of ownership, and
- a recent independent market valuation.

All documents provided as valuations of assets must be no more than three months old when you make your residence application and must be produced by a reliable, independent agency.

17

How did you earn or acquire these funds and/or assets?

Funds and/or assets must have been earned or acquired legally. Also we will not accept your application if the way in which you earned or acquired the funds would have breached New Zealand criminal law if they had been earned or acquired in the same manner in New Zealand.

Explain how you earned or acquired your nominated investment funds and/or assets.

You also need to provide evidence to show how you earned or acquired your nominated investment funds and/or assets.

Acceptable evidence to show how you earned or acquired your funds and/or assets may include:

Salaries and bonuses

- personal tax returns or tax certificates
- pay slips
- letters of appointment
- employer certificates
- bank statements showing receipt of **earnings**.

Business profits and dividends

- business financial statements
- evidence of ownership or shareholding in the business
- bank statements showing receipt of dividends.

Property

- evidence of capital appreciation of property, measured as the current value (or sale price if property has been sold) less purchase price, eg solicitor's settlement documents, bank statements showing your receipt of sale proceeds, valuation report for property currently owned.

Investments

- bank certificates
- evidence of share trading profits.

Inheritance

- probate and evidence of inheritance from your solicitor.

Gifts

- evidence of gifting, and evidence to show that your donor earned or acquired those funds and/or assets legally.

We may ask you to produce other information to help us determine your application.

18 List your earnings for at least the last five years. If your funds and/or assets came from earnings from earlier years, you will need to include appropriate information from that time.

19 Were any of these funds and/or assets gifted to you?

You may nominate funds and/or assets which have been given to you unconditionally and in accordance with local law. You will need to show that your donor acquired those funds and/or assets legally.

If some of your funds or assets have been acquired by inheritance you will need to include appropriate evidence to show that they were acquired legally, eg probate and evidence from your solicitor.

110 You need to list the documents you intend to provide with your application to support the claims that you own your investment funds and have earned or acquired them legally.

Transfer of funds to New Zealand

Please be aware that, if your application is approved in principle, you will need to be able to transfer your nominated investment funds directly to New Zealand through the banking system or a foreign exchange company that uses the banking system. This is to enable a verifiable record to be established showing the link between your nominated funds and/or assets (and your earnings), and the funds that are transferred to New Zealand.

Completing Section J Declaration

The declaration must be signed by you and any partner included in your application. It is your responsibility to ensure that you and everyone included in your application understand the declarations before you sign.

If you have any questions about the declarations, please contact the Immigration Contact Centre toll free on 0508 55 88 55 (if you are in New Zealand) or on +64 9 914 4100.

Completing Section K Immigration adviser's details

If an immigration adviser has assisted you to complete this form then they must complete this section.

Completing Section L Declaration by person assisting the applicant

Make sure that anyone who has helped you complete the form by explaining, translating, or filling it in, understands and signs the declaration in this section.

Completing Section M Paying your application fee and immigration levy

To find out how much to pay, payment methods, where to send your application, and how long a decision may take, see www.immigration.govt.nz/fees.

