

Full Name .....

Address .....

City ..... IRD Number..... D.O.B ..... /...../.....

Occupation..... Phone ..... Mobile .....

Email .....

Accepted Photo ID's, Signature Matched or verified photocopy (Please Circle)

Drivers Licence / Passport / Firearms Licence / 18+ ID# .....

Bank Account Name: ..... Bank Account Number: .....

**Declaration:**

I certify that:

- I authorise Kiwi Tax Refund a division of Kiwi Financial Services Ltd here after referred to as Kiwi Tax Refund to act as my tax agent and to obtain any tax information from Inland Revenue on my behalf by Refund by phone, fax, e-filing, secure mail and e-services from Inland Revenue.
- The information given above and over the page is correct.
- I have supplied all interest, dividend, overseas income or Maori authority income details over the page.
- I am a New Zealand resident for tax purposes.
- I authorise and instruct Kiwi Tax Refund to request/confirm my Personal Tax Summary(s) & assess My Income Tax Assessments to assess if I have declared all my tax obligations to IRD.
- I have supplied all information necessary to carry out such service and I am responsible for the accuracy and completeness of such information.
- I agree to the fee structure below ("Processing Costs") and agree to pay this fee as the cost involved in processing my tax refund.
- I am subject to any and all fees that would have been due, based on the result of my tax refund if it goes towards IRD debt.
- I authorise Inland Revenue to direct credit all tax refunds to the bank account of Kiwi Tax Refund who will deduct the agreed processing fee from my refund(s) before paying the remaining funds to me either by cheque or directly to my nominated bank account above.
- I agree that if I wish to alter or cancel my application or delink Kiwi Tax Refund as my "Tax Agent", I must contact Kiwi Tax Refund by telephone, fax or email before any work is started. If any work on my tax refund application has commenced before my change, cancellation or delink application is received by Kiwi Tax Refund, I am subject to any and all fees that would have been due, based on the result of my tax refund. I agree to pay any fees due on demand from Kiwi Tax Refund. I acknowledge that failure to pay such fees will result in debt recovery action and that I will be liable for any and all debt recovery fees incurred by Kiwi Tax Refund as a result of this action.
- Our terms and conditions are available on request or they can be downloaded from our website at [www.kiwitaxrefund.co.nz](http://www.kiwitaxrefund.co.nz)
- I understand my income tax correspondence will be sent to Kiwi Tax Refund and if I wish this to be forwarded on to myself I will contact Kiwi Tax Refund to request it.
- I understand Kiwi Tax Refund will be able to update my details at Inland Revenue and will be able to access my information.
- I authorise Kiwi Tax Refund to act on my behalf for all tax types at Inland Revenue.

**Processing Cost:**

2015 – 2018: 12% plus GST on each refunded amount will be deducted with a maximum fee of \$300 plus GST and a minimum fee of \$10 plus GST

2019 & Onwards: "Auto Accessed" clients - \$29 plus GST – "More Information" clients – As Above. "Tax Bill" clients \$29 plus GST. IR3 Filers – Starting from \$49 plus GST or 12% (which ever is higher) of Refunded amounts. Or as mutually agreed.

Signed

Dated

**Disclaimer of liability**

We have not performed an audit or review and therefore neither we nor any of employees accept any responsibility for the accuracy of the information from which the Return has been prepared. Further, the Return has been prepared at the request of and for the purposes of our client only and neither we nor any of our employee, accept any responsibility on any grounds whatsoever including liability in negligence, to any other person.

Please note your refund cheque will be sent to your above address. The processing time is completely determined by the Inland Revenue.

Do you answer **YES** to any of these Questions?

In any of the last 5 financial years;		Yes	No
1.	<b>I have received Maori authority income.</b> How much?.....		
2.	<b>I have received interest from money that I have invested/saved over \$200.</b> How much?.....		
3.	<b>I have received dividends from shares over \$200.</b> How much?.....		
4.	<b>Did you (or your partner) receive Family Assistance/ Working For Families?</b> Details.....		
5.	<b>I received Rent from a property that I own.</b> What year did you buy/sell the property?.....		
6.	<b>I worked overseas.</b> What year did you leave and come back?.....		
7.	<b>I lived overseas.</b> When did you leave and come back?.....		
8.	<b>I have been self employed.</b> When did you start and finish?.....		
9.	<b>I have received Trust income.</b> How much?.....		
10.	<b>I have received other income with no tax deducted.</b> Which years?.....		
11.	<b>Do you have income protection?</b>		
12.	<b>Do you have dependent children aged under 18 years living with you?</b> Names and DOB?.....		
13.	<b>Do you have a Student loan?</b>		
14.	<b>Are you in arrears for child support and/or working for families tax credits?</b> Details.....		
15.	<b>Do you pay/receive Child Support?</b>		
16.	<b>I have made a donation to a Charity and/ or School or Kindergarten.</b> (You will need to provide a receipt)		