



Registered as TAX AGENTS with the IRD No. 95-483-208

Full name	Phone No.
IRD No.	Email
Address	Postcode <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/>
Bank Account Number	<input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/>
Bank Account Name	
Photo Identification is required	DOB <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> / <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> / <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/>

Declaration	Circle One
• I certify that the IRD number given above is my own.	yes / no
• I certify that the bank account number given above is my own.	yes / no
• I certify that I am the above person.	yes / no
• I authorise Simple as Refunds Ltd to act as my tax agent for all tax types except child support and to obtain my information from Inland Revenue on my behalf through all media and communication channels.	yes / no
• I authorise Simple As Refunds Ltd to cancel old bank accounts with Inland Revenue.	yes / no
• I accept that I will be delinked from my existing tax agent or accountant.	yes / no
• I instruct Simple As Refunds Ltd to request my Personal Tax Summary(s) or sign and file my return(s) on my behalf. I have supplied all information necessary to carry out such services, and I am responsible for the accuracy and completeness of such information.	yes / no
• I have supplied all of my interest and dividend details and I have had no other income (see over page for income types) apart from wages and salary.	yes / no
• I am a New Zealand resident for tax purposes - ask our consultant if you are unsure.	yes / no
• I do not owe any arrears or tax or child support.	yes / no
• I agree to the 14% fee and agree to pay this processing fee as the cost involved in calculating, advising me of and providing me with my tax refund as from the date below.	yes / no
• I authorise Simple As Refunds Ltd to arrange my tax refund to be paid direct to the Simple As Refunds Ltd Trust account by Inland Revenue. Simple As Refunds Ltd will then forward the balance to my bank account after deducting their processing fee.	yes / no

NOTE CAREFULLY: Should you delink Simple As Refunds Ltd as your tax agent with Inland Revenue prior to your refund being issued, we reserve the right to recover our fee, together with a \$100 cancellation fee.

Signed	Dated
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Signed Guardian (if client under 16 or otherwise required)

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

Please answer the following questions to help with the accuracy of your refund calculation

Circle One

Do you owe any IRD arrears? (eg: tax, child support etc.)

(Note: If yes, we can still process any refunds for you, however your refund would go towards paying the arrears first and you would receive only anything remaining)

yes / no

In the past 5 years have you been overseas or moved to New Zealand?

yes / no

If yes please state travel details:

Date you moved to New Zealand _____

Do you receive any other income excluding your wage/salary?

yes / no

If yes, please tick the boxes that apply:

- Interest payments Dividends Trust Income
- Maori authority income Overseas income
- Other income (e.g self-employment, royalties, cash etc) _____

I have provided all documentation showing my other income

yes / no

In the past 5 years did you pay income protection or loss of earning insurance?

yes / no

If so, please give total and tax year it was paid:

Amount _____ Year Paid _____

Does your family receive any assistance from the government for children in your care?

yes / no

If yes, please fill in the details below: *(Note: If you need more space please ask our staff member).*

Child Name _____ IRD No. _____ DOB _____

Child Name _____ IRD No. _____ DOB _____

Child Name _____ IRD No. _____ DOB _____

Do you, or did you have a partner in the last 5 years?

yes / no

If yes please state:

Partners Name _____ Years Together _____

Did you or your partner work for more than 30 hours per week in the last 5 years?

yes / no

Authorisation:

I hereby authorise Simple As Refunds Ltd to act on my behalf as my tax agent in all future years beyond this current year, to request my personal tax summary(s) or sign and file my return(s) at their processing fee which may change from time to time. This instruction remains in force until my further notice. This means in plain terms Simple As Refunds Ltd will recover my tax refund from Inland Revenue in all future years and be entitled to deduct their fee from my refund before paying me the balance.

yes / no

I confirm all information provided above is true and correct

Signed _____ Dated _____

OFFICE USE ONLY: PLEASE COMPLETE

CHECKLIST

- Authority to act as agent explained
- Confirm all earnings details are correct and signed by the client
- Expenses to claim

Amount you told client

(If this amount changes, please make a note beside it, do not change original amount)

- Fees have been explained and understood
- Working for Families details attached

Accepted forms of ID presented:

- NZ Driver's Licence NZ Passport NZ Firearms Licence
- NZ 18+ Card International Driver's Permit NZ Certificate of Identity
- Overseas Passport with NZ immigration Visa/Permit

Notes _____

For explanations, please refer to your handbook