

Tax Refund Application Form



MY REFUND

Registered Tax Agent Under the Tax Administration Act 1994 VS12

PO BOX 6490, CHRISTCHURCH, 8442

www.myrefund.co.nz 0800 808 989 info@myrefund.co.nz

Your Details

**Indicates required fields - You must supply at least one contact number*

Your IRD Number: * - - Date of Birth: * ___/___/___

Full Name: * _____

Mobile: * _____ Alternate #: _____

Street: * _____ Suburb: _____

City: * _____ Postcode: * _____

Email: * _____

PROMO CODE

In the past five years, have you...

Please ensure you answer the below questions to the best of your ability to ensure your returns are processed accurately.

***Received additional income other than salary, wages or benefit?** No Yes
If Yes, Select your additional source(s) of income. Supporting documentation may be requested.

Self Employed Partnership Income Company Income Shareholder Income Rental Income
 Trust Income Untaxed Income Sold a Property (within 2yrs of purchase) Other Income

***Received Dividends, Interest or Maori Authority Distributions?** No Yes
If Yes, select what you receive. Supporting documentation may be requested.

Dividends Interest Maori Authority Was it over \$200 No Yes

***You or your partner received Working for Families payments?** No Yes
If Yes, select your situation. Working for Families details may be requested.

I receive payments and have a partner I receive payments and DO NOT have a partner My partner receives payments

***Arrived from overseas or been overseas more than 183 days?** No Yes
If Yes, please provide arrival and/or departure dates

Arrived in NZ on: ___/___/___ And/or Left NZ on: ___/___/___

***Made donation/s to school/kindergartens general fund, religious/charitable organisations** No Yes
If Yes, to claim you will need to send in copies of receipts for donations

Identification

***We are required to verify your identity before we can continue with your application.**

New Zealand Drivers Licence Licence Number (5A) _____ Version Number (5b) _____

Or select the identification type you are using *A clear colour copy will need to be provided*

- New Zealand Passport Overseas Passport with NZ Visa 18+ Card
 Firearms/Dealers Licence International Drivers Permit

Payment Method

Please select your preferred payment method: Direct Credit Cheque *\$5 issue fee per cheque*

If Direct Credit, please supply the following

Account Holder Name:

Bank Account Number: - - -

Legal Requirements

*** Please tick ALL the following to authorize My Refund to be your tax agent**

- I understand that MyRefund Ltd will act on my behalf until I choose to terminate this arrangement (*I can terminate this agreement by contacting either MyRefund Ltd or Inland Revenue at any time*)
- I agree MyRefund Ltd will act on my behalf for all tax types at Inland Revenue
- I give permission for MyRefund Ltd to obtain my information from Inland Revenue
- I agree that MyRefund Ltd will be able to access/modify my details at Inland Revenue
- I give permission for my tax correspondence to be sent to MyRefund Ltd
- I understand my refund will be paid into My Refund Ltd trust account and then paid directly to me less any agreed fees
- I authorise My Refund Ltd to prepare, submit, and sign tax returns and PTS's on my behalf
- I confirm the information I have provided on this form is true and correct
- I agree to the MyRefund Ltd Terms and Conditions (*Our full Terms and Conditions can be found on the back page of this application*)

Signature: _____ **Date:** ___/___/___



PO BOX 6490,
CHRISTCHURCH, 8442
0800 808 989
www.myrefund.co.nz
info@myrefund.co.nz

FREE POST
My Refund Limited
PO Box 6490
Upper Riccarton
Christchurch 8442

What you need to do....

Thank you for choosing My Refund Limited.
Please complete the other side of this form and return to My Refund Limited.

To get your form to My Refund!

- ✓ Fold the form ensuring the return address box is showing in the window and send back to us in the envelope provided.
- ✓ Scan and email to info@myrefund.co.nz
- ✓ Drop it in at 62 Orbell Street, Sydenham, Christchurch, 8023

STANDARD TERMS & CONDITIONS OF ENGAGEMENT Vs11

3. FEES

I agree to pay to My Refund Limited a fee for tax assessment preparation as stipulated below for all tax refunds paid from every personal tax summaries / tax returns lodged by the company on my behalf.

PTS / IR526

Under \$10 Nil to client
Between \$11 & \$50 \$10.00
Between \$51 & \$150 \$30.00
Between \$151 & \$200 \$50.00
Between \$201 & \$300 \$70.00
Between \$301 & \$500 \$120.00
Between \$501 & \$600 \$150.00
Between \$601 & \$1500 \$220.00
Between \$1501 & \$5000 \$350.00
Over \$5001 \$500.00

IR3 / IR524 / IR50

Under \$150 70% of refund
Between \$151 & \$600 \$150
Over \$600 as per prescribed fees

Discretionary Fees

ID Authentication per attempt \$2.00
Payments issued by cheque \$5.00
Cheque Reissue fee \$30.00
Deposit handling fee \$30.00
Collection cost for unpaid fees \$100.00
Direct credit track and trace fee \$50.00
(Other tax types please enquire)
Note all fees are GST inclusive.

1. AUTHORITY TO OBTAIN INFORMATION FROM INLAND REVENUE

I give authority for the tax agency My Refund Limited to link my details with IR to their agency client list and for My Refund Limited to act as my tax agent for all purposes associated with the preparation of my personal tax summaries / tax returns. I acknowledge that this gives My Refund Limited authority to do all of following:

- ✓ Link my Inland Revenue Number to their client list and if I already have a tax agent I understand that I will be delinked from my previous agents list. If I choose to delink My Refund as my agent I accept responsibility for notifying the Inland Revenue or my new tax agent to remove the My Refund Ltd Trust Account from my records held by the Inland Revenue.
- ✓ Obtain information from Inland Revenue in regards to all my tax types and all tax matters by any IRD contact method available such as telephone, internet, fax, info express and all E services and make changes.
- ✓ To prepare and sign tax returns on my behalf
- ✓ Process all future tax years until I request otherwise, in writing to info@myrefund.co.nz or posted to PO Box 6490, Christchurch 8442
- ✓ Agree to My Refund Limited linking that allows the tax agent to have full access to information held by Inland Revenue and ability to modify customer details relating to the tax type they are linked for.
- ✓ Receive IR correspondence for all linked tax types.
- ✓ Authority is given for any refund credits to be transferred to MyRefund Ltd trust account prior to refund to the client (if applicable). Such refund to be credited to client less any agreed fees.

2. DISCLAIMER BY MY REFUND LIMITED

My Refund Limited has relied upon the information submitted by me and provided it to Inland Revenue. Therefore My Refund Limited does not accept any responsibility or liability for the accuracy of the material from which the personal tax summaries / tax returns have been prepared and My Refund reserves the right to delink from a client at any time. I agree that I am liable for any payment required by IR as a result of My Refund Limited filing my tax return(s) or requesting my Personal Tax Summaries.

4. RECEIPT AND PAYMENT OF TAX REFUNDS

In respect of any tax refunds due to me, I give the following authorities:

1. For My Refund Limited to receive any refund on my behalf and deposit them into the My Refund Limited Trust Account;
 2. My Refund Limited to debit from such refunds and pay to My Refund Limited my tax return or PTS preparation fee as set out above or on application form.
 3. For My Refund Limited to pay the net balance of the refunds to me, either by direct credit into my bank account, or by cheque as per postal address supplied with the filing authorisation. Payment by Cheque incurs additional fees.
 4. For MyRefund Limited to recover my tax return preparation fee from payments issued by the IRD direct to me. I acknowledge that my tax return preparation fee must be paid within 7 working days to avoid any additional costs
- MyRefund Ltd reserves the right to charge for any time involved in the recovery of unpaid fees and to disclose to any debt collection agency details necessary to recover those unpaid fees. Fees are incurred as soon as the application is processed. If you delink MyRefund Ltd as your tax agent prior to any refunds being issued you will incur a \$100 cancellation fee for unpaid fees.

5. TIMING

I acknowledge that the processing time may vary and maybe extended as a result of peak processing times within Inland Revenue.

Statements and Results will be notified by email. If no email is present alternative notification is available by request.

6. ID VERIFICATION

I am over 16 years of age at the time of application and I agree to provide My Refund Limited with, and further agree to verification of, an acceptable form of ID, at any time requested to do so, at agreed fee.. Acceptable ID – NZ driver's licence numbers and exact name as it appears on licence, or scanned copy of, NZ passport (please scan/copy the pages showing photo, name and specimen signature) Overseas passport with New Zealand immigration visa / permit (please scan/copy the pages showing photo, name, any pages showing current work, visitor permits, or residency documentation and a specimen signature) or call Inland Revenue on 0800 227 774 for exempt list, NZ firearms or dealers' licence, NZ 18+ card, International Drivers' Permit (issued by a member country of the UN Convention on Road Traffic. Applications other than those with driver licence details require a printed signed application form to accompany them. Persons under the age of 16 years old at the time of application need to contact MyRefund prior to applying.

MISC

MyRefund Ltd reserves the right to charge for any time involved in the recovery of unpaid fees and to disclose to any debt collection agency details necessary to recover those unpaid fees. Fees are incurred as soon as the application is processed. If you delink MyRefund Ltd as your tax agent prior to any refunds being issued you will incur a \$100 cancellation fee for unpaid fees. I agree that all interest earned on all monies received on my behalf will accrue to the benefit of MyRefund Limited until such time as those funds are received by me.

PRIVACY ACT 1993

Information the company obtains in the course of this engagement is subject to confidentiality requirements, in addition to obligations under the Privacy Act 1993. My Refund Limited will not disclose that information to other unrelated parties without your express consent, except as required by law. However, you agree to allow MyRefund Limited and associated MyGroup Businesses, or others for which you have made product or service enquiries, to communicate with you by mail/email and/or phone/text message.

OFFICE USE ONLY

Date received:

Entered By: