

## STANDARD TERMS & CONDITIONS OF ENGAGEMENT Vs15.

### 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.(address below)
- 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 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 Tax Returns

**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 each tax year processed. All fees are exclusive of GST.

#### Salary + Wage earners

Auto Assessed Refunds \$25 flat fee

#### Tax Return Preparation fees

Tax Bill	\$25
\$0 to \$200	Min fee \$30
\$200 - \$300	\$49
\$300 - \$500	\$69
Over \$500	\$99 Max Fee

#### IR3 Returns

Min Fee of \$119

#### IR526 Donations

\$30 Flat Fee

#### Discretionary Fees

ID Authentication per attempt \$2.00

Payments issued by cheque \$5.00

Cheque Reissue fee \$30.00

Collection cost for unpaid fees \$50.00

Direct credit track and trace fee \$50.00

Note all fees are GST exclusive.

**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 \$50 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.

Postal Address: MYREFUND, PO Box 6490, Christchurch 8442 [info@myrefund.co.nz](mailto:info@myrefund.co.nz) [www.myrefund.co.nz](http://www.myrefund.co.nz)