



WORKING FOR FAMILIES FORM

The amount of Family Assistance available to families is thousands of dollars, so we encourage you to complete the application forms and return them to TaxRefunds.co.nz Ltd as soon as possible.

Please use black or blue ink only.

Year ended 31 March _____

Personal Contact Details:

Please fill out the following contact details:

Personal IRD Number: _____

Surname: (family name) _____

First name/s: _____

Email address: _____

Telephone number: _____

Postal Address:

Street number/name _____ Suburb _____ Town/City _____ Postcode _____

In what tax years ended 31st March, if any, have you had a New Zealand student loan, please circle:

2005 2006 2007 2008 2009

Spouse or Partner details:

If you currently have or had a spouse or partner during the year above, please complete:

Personal IRD Number: _____

Surname: (family name) _____

First name/s: _____

Dependent Children:

Please list all dependent children 18 years or under:

Child's First Name:	Child's Surname:	Date of Birth: (dd/mm/yyyy)	IRD Number:
		/ /	
		/ /	
		/ /	
		/ /	
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		/ /	

PLEASE NOTE:

If you do not have IRD Number for your children, the principal caregiver must complete an IR595 form, downloadable from taxrefunds.co.nz. Take the completed IR595 form with two forms of identification to your nearest PostShop or Automobile Association (AA) to obtain them.

PLEASE TURN OVER...

Complete and return this signed form to:

TaxRefunds.co.nz Ltd POSTAL: PO Box 248, Oamaru 9444 FAX: +64 9 353 1433 EMAIL: familyassistance@taxrefunds.co.nz

If you have any questions please contact us at familyassistance@taxrefunds.co.nz FREEPHONE: 0800 526 527

DECLARATION

APPOINTMENT OF TAX AGENT

By signing below, the client, whose IRD number, name and personal details are completed above-

1. Acknowledges that those details are correct;
2. That he/she has read, and agrees to be bound by the Standard Terms and Conditions of Engagement of TaxRefunds.co.nz Limited as his/her tax agent; and
3. Hereby authorises TaxRefunds.co.nz Limited to link to his/her client details at the Inland Revenue, and to act as his/her registered tax agent for all purposes associated with his/her income or other tax status for the above tax year.

The client-

1. Agrees that if the client proceeds to apply for a refund through TaxRefunds.co.nz Limited, the client shall pay TaxRefunds.co.nz Limited the filing fee of 12.5% of the refund to a maximum of \$500.00 per return, with a minimum fee of \$12.50 per return; and
2. Agrees that if the client proceeds to apply for a refund themselves or through a third party, the client agrees to pay TaxRefunds.co.nz Limited the filing fee of 12.5% of the refund to a maximum of \$500.00 per return, with a minimum fee of \$12.50 per return.

TAXREFUNDS.CO.NZ AS YOUR TAX AGENT

A Tax Agent's obligation is to ensure all your taxation is up to date. By submitting for a free estimate and signing this form you are authorising us to become your Tax Agent. All tax agents must be registered with the Tax Agents' Board and must follow strict regulations that ensure they act in a professional manner. TaxRefunds.co.nz Ltd is under the jurisdiction of NZICA.

Appointing TaxRefunds.co.nz as your Tax Agent allows us to access your earnings information from the IRD e-services website. The IRD e-services website is available only for Registered Tax Agents and Chartered Accountants within NZ to view and is a secure website.

These records include your earning details, employer details, and taxation details that the IRD hold. Some records we cannot view without special permission from you, even as your tax agent, such as child support arrears.

Appointing TaxRefunds.co.nz as your Tax Agent can also be referred to as "Linking". "Linking" to TaxRefunds.co.nz will result in any income tax related documents being mailed to TaxRefunds.co.nz's address for us to establish whether or not the correct amount of taxation has been calculated. Documents such as Working for Families and Student Loans will continue to be mailed to you.

When you appoint TaxRefunds.co.nz as your Tax Agent the IRD will send you a generic letter stating that you have now been linked to TaxRefunds.co.nz Ltd. It will state the most current tax year but this does not mean we will be processing that tax year. **WE ONLY PROCESS THE YEARS THAT YOU REQUEST US TO CALCULATE.** We cannot do past or future years unless you specifically give permission for those particular years.

We do not deduct a fee for any Working for Families Tax Credits that are calculated by the IRD and paid to you weekly or fortnightly. Once you are in the IRD system and they have calculated your application correctly, then there is no fee deducted.

WHAT HAPPENS IF YOU RECEIVE A REFUND?

If a refund is calculated, we will ask you to confirm the refund.

Once you have confirmed any refunds, the bank account will be updated to a Client Trust Account in the name of Tax Refund Management Ltd Client Trust Account, which is fully audited by PriceWaterHouse Coopers.

TaxRefunds.co.nz Ltd, then deducts any tax return preparation fee and returns the net amount to you directly into your bank account.

Signature: _____
(Principal caregiver)

Print Name: _____

Signature: _____
(Spouse or partner)

Print Name: _____

OFFICE USE ONLY

Date received:

Date contacted:

Complete and return this signed form to:

TaxRefunds.co.nz Ltd **POSTAL:** PO Box 248, Oamaru 9444 **FAX:** +64 9 353 1433 **EMAIL:** familyassistance@taxrefunds.co.nz

If you have any questions please contact us at familyassistance@taxrefunds.co.nz **FREEPHONE:** 0800 526 527