

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+/Kiwi Access ID#.....

Bank Account Name: Bank Account Number:

Declaration:

I certify that:

- I authorise Kiwi Personal Tax a division of Kiwi Financial Services Ltd here after referred to as of Kiwi Financial Services Ltd 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 of Kiwi Financial Services Ltd 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 application.
- 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 Financial Services Ltd 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 of Kiwi Financial Services Ltd as my "Tax Agent", I must contact of Kiwi Financial Services Ltd by telephone, fax or email before any work is started. If any work on my tax application has commenced before my change, cancellation or delink application is received by of Kiwi Financial Services Ltd, 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 of Kiwi Financial Services Ltd. 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 of Kiwi Financial Services Ltd as a result of this action.
- Our terms and conditions are available on request or they can be downloaded from our website - www.kiwipersonaltax.co.nz
- I understand my income tax correspondence will be sent to of Kiwi Financial Services Ltd and if I wish this to be forwarded on to myself I will contact of Kiwi Financial Services Ltd to request it.
- I understand of Kiwi Financial Services Ltd will be able to update my details at Inland Revenue and will be able to access my information.
- I authorise of Kiwi Financial Services Ltd to act on my behalf for all tax types at Inland Revenue.

Tax Year Processing Cost:

2021 - 2024: 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

2025 "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.

Kiwi Financial Services Limited | Level 2 – 86 Victoria Street | Wellington

PO Box 24217 Manners Street Wellington 6142 | Ph (04) 499 1101 | www.kiwipersonaltax.co.nz

Do you answer YES to any of these Questions?

In any of the last 5 financial years;		Yes	No
1.	I have received Maori authority income. How much?.....		
2.	I have received interest from money that I have invested/saved. Where & how much?.....		
3.	I have received dividends from shares. Where & how much?.....		
4.	Did you (or your partner) receive Family Assistance/ Working For Families/Child Support? If so, are you in arrears for any		
5.	I received Rent from a property that I own. What year did you buy/sell the property?.....		
6.	I worked overseas. What year did you leave and come back?.....		
7.	I lived overseas. When did you leave and come back?.....		
8.	I have been self-employed. When did you start and finish?.....		
9.	I have received Trust income. How much?.....		
10.	I have received other income with no tax deducted. Which years?.....		
11.	Do you have income protection?		
12.	Do you have an Employee Share Scheme or share plan (ESS)? If yes, please provide documentation		
13.	Do you have a student loan?		
14.	I have received interest payments Where & how much?.....		
15.	Do you have a foreign superannuation or pension scheme? If yes, please provide documentation and did you make any withdrawals or transfers from the scheme during the year?		
16.	I have made a donation to a Charity and/ or School or Kindergarten. (You will need to provide a receipt)		
17.	I would like to be contacted to see if my current KiwiSaver is right for my current situation.		