

First name:Middle name: Last Name:

Address:Suburb:Town/City:

Home/Mobile:Email: IRD No:

D.O.B.: Last year at High School: Identification:

Bank Account Name:

BANK BRANCH ACCOUNT NUMBER SUFFIX

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AUTHORITY TO ACT

- ❖ I certify that I am the above person and the IRD number and the Bank account number (if provided) above is my own and I authorise EZ Refunz Ltd to sign any tax returns/PTS's on my behalf.
- ❖ I authorise EZ Refunz Ltd to be my tax agent and also authorise EZ Refunz Ltd and its staff to obtain my information from Inland Revenue through all channels including electronic ones for all tax types (except child support) to enable my tax returns/PTS's to be completed until further notice. This may include cancellation of old bank accounts held by Inland Revenue.
- ❖ I will advise EZ Refunz Ltd or Inland Revenue if there is any change in my personal details.
- ❖ I acknowledge to the fee structure below and agree to pay this processing fee for the service provided by EZ Refunz Ltd in assessing and requesting my refunds due for all tax types and I understand that the service fee listed below is for each financial year and each tax type that a refund is assessed and requested on my behalf.
- ❖ I acknowledge that EZ Refunz Ltd will receive any refunds due to me on my behalf into their EZ Refunz Ltd trust account where the tax preparation fee will be deducted and then the remaining balance is transferred to my bank account(if given) or post a refund cheque to the address given above.
- ❖ I understand that when EZ Refunz Ltd links me to their agency I will be delinked from my current tax agent and I accept that I can delink EZ Refunz Ltd as my tax agent at any time by contacting EZ Refunz Ltd or Inland Revenue however doing so prior to my refund being issued will incur a cancellation charge of \$100.00.
- ❖ I authorise EZ Refunz Ltd to do my tax refund every year automatically until I notify EZ Refunz Ltd or Inland Revenue to withdraw authority to access my IRD information.
- ❖ I agree to pay EZ Refunz Ltd 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 and Ez Refunz holds the authority to deduct their processing fee from the other years tax refunds in order to cover their fee for tax assessment preparation.
- ❖ I will be interested in all future promotions/offers by EZ Refunz Ltd and can be contacted using my phone number, email or address.
- ❖ EZ Refunz Ltd reserves the right to delink any client any time and for any reason without any notification.
- ❖ EZ Refunz Ltd will not be responsible for cheques lost in the mail. Should a cheque be lost in the mail, we charge a \$25 cheque cancellation fee before a cheque is resent or a bank deposit made.
- ❖ EZ Refunz Ltd will not be responsible for any money deposited into a bank account provided in error.

SERVICE FEES

REFUND LEVEL PER TAX YEAR	PROCESSING FEE INCLUDING GST
REFUND UPTO \$285	ONLY \$37
REFUND OVER \$285	ONLY 13%

A \$5 per cheque fee will apply for each refund issued by cheque. We charge no fee if there is no refund for PTS. If you need to file an IR3 tax return there is a minimum fee of \$79.00 per tax year plus the processing fee of 13%. A cheque cancellation fee of \$25.00 will apply if a refund cheque needs to be cancelled due to any reason and will be deducted from the refund(s). A \$35.00 fee will apply if refund needs to be transferred to an overseas bank account. A \$50.00 fee will apply if EZ Refunz Ltd receives any unsolicited payments (if you delink from us and still we receive any payment) on your behalf.

I HAVE READ AND UNDERSTOOD ALL THE TERMS OF THIS AUTHORITY

SIGNED..... DATE.....

Disclaimer of Liability: We have not performed an audit or review and therefore neither we and nor any of our employees accept accountability for the accuracy of the information from which this client tax return/Personal Tax Summary has been prepared. In addition the tax return/PTS has been prepared at the request of and for the purpose of our client and neither we and nor our employees accept any responsibility & accountability on any ground whatsoever including liability in negligence to any other person.

Disclaimer of Fee: The fee mentioned on EZ REFUNZ website and on this online form is for online applications/ applicants only. Our face to face and door to door fee is different.

PLEASE TICK THE FOLLOWING THAT APPLIES TO YOU IN THE LAST 5 FINANCIAL YEARS & PROVIDE THE DETAILS BELOW:

- ☐ **Income from Salary/Wages/ Schedular(Withholding) Payments /Government Benefit/Pension/ACC**
- ☐ Income from Interest /Dividends
- ☐ Income from Rental Property
- ☐ Income from any Business/ Partnership
- ☐ Income from Maori Authority Distributions
- ☐ Income from a Trust
- ☐ Income from Shareholder Salary
- ☐ Income from Overseas
- ☐ Income from other source (Intellectual Property, Royalties & Cash Jobs)
- ☐ **You/Your Partner have received Working For Families tax Credits (Family Support)**
Partner/Spouse Name.....
Partner/Spouse IRD no. (Optional).....
- ☐ OR Tick this box if you have been a solo parent for the past 5 years
Name/Names of Children Under your care with their date of birth (DOB)
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- ☐ Have/had student loan
- ☐ Have/had paid any donations to an approved charitable organisation please provide copies of receipts
- ☐ Have/had expenses to claim
- ☐ Have you been out of New Zealand for 6 months or more at one time in the last 5 years: YES or NO
If YES, please provide us with the following details:
Temporarily left NZ.....Date you re-entered NZ.....

However if I earn any other income (other than wages or salary) or if any of my personal contact details (address, e-mail or phone number) changes in the present and future years, I will contact and inform EZ Refunz Ltd to update it so that they can stay in contact with me.

PLEASE NOTE: IF YOU HAVE TICKED ANY OF THE QUESTIONS STATED ABOVE WE WILL CONTACT YOU TO REQUEST & GATHER FURTHER INFORMATION.

I hereby certify that the information provided in this application form is true & correct to the best of my knowledge and belief.

SIGNED.....DATE.....