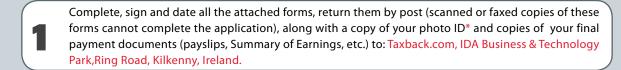




## **INSTRUCTIONS**

### IT'S EASY TO GET YOUR NZ TAX REFUND. JUST FOLLOW EITHER APPLICATION OPTION 1 OR 2!



To get things moving even faster, scan and email the above documents to: newzealand@taxback.com, prior to posting them. This way we can start processing your application way before your post is received.

Thank you for choosing to use **taxback.com**. We look forward to working with you to apply for your New Zealand tax refund. In this pack, you will find everything you need to authorise taxback.com to apply for this refund on your behalf. Please read this pack carefully, sign and return to your nearest taxback.com office.

*In order to apply for your* **2013** *tax refund we kindly ask you to follow these instructions:* 

## 1. New Zealand Tax Refund Application

Please fill in the enclosed form with as much detail as possible.

#### 2. Authorisation Form (IR597)

Please complete the form and sign where marked with an  $\checkmark$ .

#### 3. New Zealand Tax Return Form (IR3)

Please complete the form and sign where marked with an  $\checkmark$ .

#### 4. Early Assessment Form (IR50)

Please complete the form and sign where marked with an  $\checkmark$ .

#### 5. Customer Agreement

Please fill in the form with your name and surname, sign and date it at the places marked with an  $\checkmark$ .

#### taxback.com

IDA Business & Technology Park Ring Road, Kilkenny

**IRELAND** 

#### taxback.com

Level 2. 600 George Street Sydney NSW 2000 **AUSTRALIA** 

#### taxback.com

1<sup>st</sup> Floor. 277-281 Oxford Street London W1C 2DL

#### UNITED KINGDOM

#### taxback.com\*

Suite 1618. 24B Moorefield Rd Johnsonville, Wellinaton 6037

**NEW ZEALAND** 

<sup>\*</sup> Acceptable ID is a legal and valid document, showing your photo and signature. (Such as a driving licence, passport, ID card, student card, 18+ card, etc.) If you send us a copy of your passport please send us a copy of your NZ visa or work permit as well.

<sup>\*</sup> Postal Address only





## APPLICATION FORM

CONTACT INFORMATION				
First Name		Family Name		
Mr Mrs Miss Date of Birth // // // // Mrs Miss Date of Birth		Email		
Phone		How did you hear about our company?		
Home address and country				
Have you worked in any other country? UK Ireland Other		Have you appli	ed for a tax ref	fund from there? Yes No
Which tax years would you like to apply for:				
1 <sup>st</sup> April 2012 – 31 <sup>st</sup> March 2013	ch 2012		1 <sup>st</sup> April 2010 –	- 31 <sup>st</sup> March 2011
1 <sup>st</sup> April 2009 – 31 <sup>st</sup> March 2010	ch 2009		1 <sup>st</sup> April 2007 –	31st March 2008
Have you applied for a refund before? Yes No If Yes, please specify for which tax years:				
If you want us to check for you a previous tax year not listed above	ve pleas	e specify the tax	year:	
STATUS II	NFOR	MATION		
Date of arrival in New Zealand//	Dat	e of departure fr	om New Zeala	and/
Address while in New Zealand	'			
IRD Number	Nev	v Zealand Visa Ty	/pe	
Purpose for visiting New Zealand				
Did you receive any other income apart from salaries and wages in NZ? Yes No If yes, what type of income?				
Do you intend to return to New Zealand? Yes \( \square\) No \( \square\) If yes,	, approx	k. when MON	ΓH/ YEA	\R
WHERE DID YO	U WC	RK? EMPLOYE	:R <b>1</b>	
Company name	City	,		Postcode
Address				
Telephone & Fax	Occ	upation		
Worked From// Until//	Do	Do you have your cumulative pay slip? Yes No		
If no, would you like us to source replacements for you?* Yes No	Hav	e you received a :	Statement / Sui	mmary of Earnings? Yes No
WHERE DID YOU WORK? EMPLOYER 2				
Company name	City	,		Postcode
Address				
Telephone & Fax	Occ	upation		
Worked From// Until//	Do	you have your c	ımulative pay	slip? Yes No
If no, would you like us to source replacements for you?* Yes No Hav		lave you received a Statement / Summary of Earnings? Yes 🔲 No 🗌		
*Document retrieval fee applies				
If you had more than 2 employers, please include infor	motion	on a congrate	naga	



# Elect someone to act on your behalf



**IR 597**June 2009

Complete this form to nominate someone (for example, a family member or company's staff member) to act on your behalf with Inland Revenue. This includes making enquiries, receiving your statements, refunds and other correspondence. Having a nominated person does not change your responsibilities. You are still responsible for your own tax affairs, so you need to make sure that any returns are filed and tax paid by the due date.					
Use the space available on the	Use the space available on the back of this form if you need to nominate more than one person.				
For individuals, a nominated per	For individuals, a nominated person can only be chosen by the person whose account the nominated person will have authority.				
	For a non-individual, a nominated person (for example, payroll clerk or office administrator) can only be set up by a company director, a trustee or estate administrator, or an executive officer.				
To protect your privacy and secu act on your behalf (your nominee	rity we can only discuss your tax affairs ).	and/or child support with you o	r the person you nominate to		
Child support customers will need to complete an Elect someone to make child support enquiries on your behalf (IR146) form. To order a copy, phone Child Support on 0800 221 221					
Your first name(s)		Your surname			
Your IRD number	(8 digit numbers start in the second box.	Your phone number	)		
Your postal address (We need this information to validate the nomination)	(o digit numbers start in the second box.	/ 2 3 <del>4 3</del> 0 / 0 J			
Non-individuals only Organisation's name					
Organisation's IRD number		Nominator's position (eg director)			
Please provide details of the person who will act on your behalf					
Your nominee's first name(s)	Your nominee's surname				
Your nominee's IRD number	1 0 2 6 7 5 5 7 6 Your nominee's phone number +353 1 887 1999				
Tour Horninee 3 IIID Humber	10201010	our nominee's phone number	+353) 1 887 1999		
Your nominee's postal address	EUROPEAN STUDENT SERVIC	·	+353) 1 887 1999		
		CES LTD			
	EUROPEAN STUDENT SERVIC	CES LTD			
Your nominee's postal address  Position occupied – non-individuals	EUROPEAN STUDENT SERVIC IDA Business & Technology Par TAX PREPARER	CES LTD			
Your nominee's postal address  Position occupied – non-individuals (eg office administrator)  Show which accounts your nominand how long they will act for Please tick:	EUROPEAN STUDENT SERVIC IDA Business & Technology Par TAX PREPARER	CES LTD k, Ring Road, Kilkenny, Irel Start date	and End date		
Your nominee's postal address  Position occupied – non-individuals (eg office administrator)  Show which accounts your nominand how long they will act for Please tick:  • the appropriate circles • complete dates you want your	EUROPEAN STUDENT SERVICE IDA Business & Technology Pare TAX PREPARER Tax prepare will act on your behalf for	CES LTD k, Ring Road, Kilkenny, Irel Start date	and End date		
Your nominee's postal address  Position occupied – non-individuals (eg office administrator)  Show which accounts your nominand how long they will act for Please tick:  • the appropriate circles	EUROPEAN STUDENT SERVICE IDA Business & Technology Pare TAX PREPARER Inee will act on your behalf for  Working for Families Tax Credits*	CES LTD k, Ring Road, Kilkenny, Irel Start date	and End date		
Your nominee's postal address  Position occupied – non-individuals (eg office administrator)  Show which accounts your nominand how long they will act for Please tick:  • the appropriate circles  • complete dates you want your nominee to act on your behalf by completing the start date and	EUROPEAN STUDENT SERVICE IDA Business & Technology Pare TAX PREPARER Inee will act on your behalf for  Working for Families Tax Credits*  Fringe benefit tax	CES LTD k, Ring Road, Kilkenny, Irel Start date	and End date		
Your nominee's postal address  Position occupied – non-individuals (eg office administrator)  Show which accounts your nominand how long they will act for  Please tick:  the appropriate circles  complete dates you want your nominee to act on your behalf by completing the start date and end date boxes.  If you want them to act indefinitely leave the end date blank  You can end a nominated person's authority at any time by phoning	EUROPEAN STUDENT SERVICE IDA Business & Technology Par TAX PREPARER  The will act on your behalf for  Working for Families Tax Credits*  Fringe benefit tax  Goods and services tax	CES LTD k, Ring Road, Kilkenny, Irel Start date	and End date		
Your nominee's postal address  Position occupied – non-individuals (eg office administrator)  Show which accounts your nominand how long they will act for  Please tick:  the appropriate circles  complete dates you want your nominee to act on your behalf by completing the start date and end date boxes.  If you want them to act indefinitely leave the end date blank  You can end a nominated person's	EUROPEAN STUDENT SERVICE IDA Business & Technology Par TAX PREPARER  Incee will act on your behalf for  Working for Families Tax Credits*  Fringe benefit tax  Goods and services tax  Income tax	CES LTD k, Ring Road, Kilkenny, Irel Start date	and End date		
Your nominee's postal address  Position occupied – non-individuals (eg office administrator)  Show which accounts your nominand how long they will act for  Please tick:  the appropriate circles  complete dates you want your nominee to act on your behalf by completing the start date and end date boxes.  If you want them to act indefinitely leave the end date blank  You can end a nominated person's authority at any time by phoning us on 0800 227 774 (individuals) or	EUROPEAN STUDENT SERVICE IDA Business & Technology Pare TAX PREPARER  Inee will act on your behalf for  Working for Families Tax Credits*  Fringe benefit tax  Goods and services tax  Income tax  PAYE	CES LTD k, Ring Road, Kilkenny, Irel Start date	and End date		
Your nominee's postal address  Position occupied – non-individuals (eg office administrator)  Show which accounts your nominand how long they will act for  Please tick:  the appropriate circles  complete dates you want your nominee to act on your behalf by completing the start date and end date boxes.  If you want them to act indefinitely leave the end date blank  You can end a nominated person's authority at any time by phoning us on 0800 227 774 (individuals) or	EUROPEAN STUDENT SERVICE IDA Business & Technology Pare TAX PREPARER  Incee will act on your behalf for  Working for Families Tax Credits*  Fringe benefit tax  Goods and services tax  Income tax  PAYE  Rebate claims	CES LTD k, Ring Road, Kilkenny, Irel Start date	and End date		
Your nominee's postal address  Position occupied – non-individuals (eg office administrator)  Show which accounts your nominand how long they will act for  Please tick:  the appropriate circles  complete dates you want your nominee to act on your behalf by completing the start date and end date boxes.  If you want them to act indefinitely leave the end date blank  You can end a nominated person's authority at any time by phoning us on 0800 227 774 (individuals) or	EUROPEAN STUDENT SERVICE IDA Business & Technology Pare TAX PREPARER  Incee will act on your behalf for  Working for Families Tax Credits*  Fringe benefit tax  Goods and services tax  Income tax  PAYE  Rebate claims  Student loan	CES LTD k, Ring Road, Kilkenny, Irel Start date	and End date		
Your nominee's postal address  Position occupied – non-individuals (eg office administrator)  Show which accounts your nominand how long they will act for  Please tick:  the appropriate circles  complete dates you want your nominee to act on your behalf by completing the start date and end date boxes.  If you want them to act indefinitely leave the end date blank  You can end a nominated person's authority at any time by phoning us on 0800 227 774 (individuals) or	EUROPEAN STUDENT SERVICE IDA Business & Technology Par TAX PREPARER  Incee will act on your behalf for  Working for Families Tax Credits*  Fringe benefit tax  Goods and services tax  Income tax  PAYE  Rebate claims  Student loan  KiwiSaver  Other	CES LTD k, Ring Road, Kilkenny, Irel Start date	and End date		

	,
2013 provisional tax	
38 Is the amount in Box 35A a debit of more than \$2,500?	
No Go to Question 39 Yes You may have to pay 2013 provisional tax. See page 50 of the guide, then print the details below.	
Print the option used (S, E or R) in Box 38A.	
Print your 2013 provisional tax payment in Box 38B.      Print your 2013 provisional tax payment in Box 38B.      Section 1.	)
39 Did you at any time during the income year hold rights in a foreign company, unit trust, superannuation scheme or life insurance policy for which disclosure is required?	
No Go to Question 40 Yes See page 52 of the guide.	
40 Is this return for a part-year?	
No Go to Question 41 Yes See page 53 in the guide. If "Yes", tick the situation below that applies to you	l.
You arrived in (or returned to) New Zealand and you're now a tax resident	
You left New Zealand permanently (for more than 325 days)	
You were declared bankrupt	
This return is for a deceased person to the date of their death	
Your balance date changed during the year.  Print the start and end	
dates the return is for in the spaces provided.  Day Month Year Day Month Year	
Notice of assessment and declaration	
41 Please see page 53 in the guide, then read and sign the following:  The information in this return is true and correct and represents my assessment for the year ended 31 March 2012 as required under the Tax Administration Act 1994. It is also a correct statement of my earnings for the purposes of the Injury Prevention, Rehabilitation, and Compensation Act 2001.  Signature  Date	
Please make a copy of this return for your own records.	
There are penalties for not filing a tax return or for filing a false return. See page 6 in the guide.	
<ul> <li>What to do next</li> <li>Attach your summary of earnings or Working for Families Tax Credits form to your return if you've made any changes on them.</li> <li>Print your name and IRD number on all other papers attached to your return.</li> <li>Send us your return on or by 7 July 2012, unless you have an extension of time or a non-standard balance date.</li> <li>Send your completed return in the envelope supplied, or to the address shown below. Keep a copy for your records.</li> <li>If you have tax to pay, you need to pay it by 7 February 2013 to avoid any penalties (if you have a tax agent see page 55 in the guide) You can pay earlier if you want to. If you want to pay now, staple your cheque to the front page of this return.</li> </ul>	
Privacy  To find out what may happen to the information you provide on this form, see page 62 in the guide.	
Injury Prevention, Rehabilitation, and Compensation Act 2001  See page 61 in the guide to understand how the information you provide on this form will be used for ACC purposes.	
Send this form to:  Inland Revenue PO Box 39090 Wellington Mail Centre Lower Hutt 5045	
OFFICE USE ONLY  April 2012  Operator Corresp indicator Payment attached Return Al Yes No Scanner	

12.	Will you keep property in New Zealar	and (such as land, buildings or shares)? If "Yes" give details below.		
		Yes No (Tick one)		
	The address of any property	Street address or PO Box number		
		Town or city		
	Details of shares (attach a separate note if necessary)			
	,			
	What arrangements have you made for the shares and property?			
13.	Will you be keeping any New Zealand	nd bank accounts open? If "Yes" attach details.		
		Yes No (Tick one)		
14.	Will you have any other income from	New Zealand paid or credited to you after you leave? If "Yes" attach details.		
		Yes No (Tick one)		
15.		rmonantly or for more than 225 days and I will not have an and wing relationship		
	I will be away from New Zealand permanently or for more than 325 days and I will <b>not</b> have an enduring relationship with New Zealand after I leave. I understand that if I return to New Zealand my tax situation may be reviewed.  Signature			
		Date		
Priva	cy Act 1993			
Meeti		g accurate information to Inland Revenue. We ask you for information so we can assess		

You must, by law, give us this information. Penalties may apply if you do not.

We may exchange information about you with the Ministry of Social Development, Ministry of Justice, Department of Labour, Ministry of Education, New Zealand Customs Service, Accident Compensation Corporation or their contracted agencies. Information may be provided to overseas countries with which New Zealand has an information supply agreement. Inland Revenue also has an agreement to supply information to Statistics New Zealand for statistical purposes only.

You may ask to see the personal information we hold about you by calling us on 0800 377 774. Unless we have a lawful reason for withholding the information, we will show it to you and correct any errors.

#### **Notes**

A New Zealand tax resident is anyone who:

- is in New Zealand for more than 183 days in any 12 months, or
- has an "enduring relationship" with New Zealand.

A person becomes a non-resident if they:

- are away from New Zealand for more than 325 days in any 12 months, and
- don't have an "enduring relationship" with New Zealand.

An "enduring relationship" with New Zealand covers presence in New Zealand, accommodation, social and economic ties, employment or business, personal property, intentions, benefits and pensions. Our booklet New Zealand tax residence (IR 292) has more information.

OFFICE USE ONLY			
1.	IRD number provided.		
2.	Return completed and signed.		
3.	Confirmation of earnings, PAYE and earners' account levy and residual claims levy attached.		
4.	Refund application - people leaving New Zealand (IR 50) completed and signed.		
5.	Student loan assessment calculation (SL 50) completed if needed.		
6.	Person will be absent for more than 325 days.		
7.	Departure date confirmed (tickets, or a travel agent's itinerary and proof of full payment, attached).		
8.	Flight number:		
	Day Month Year		
9.	FIRST checked – prior year ind/arrears/previous return filed/SL and CS details updated.		
	Checked by:		
	Day Month Year		





## **CUSTOMER AGREEMENT**

The terms and conditions below refer to the taxback.com tax returns and refund services. Please read these points in full and ensure you understand them before signing.

#### I confirm that:

- 1. I understand that taxback.com is a trading name for the services of Taxback Inc., Chicago, USA, and hereby contract with Taxback Inc. to carry out the services described herewith.
- 2. I understand that Taxback Inc will utilise its parent company Taxback and its subsidiary and affiliate companies to gather information regarding the services where necessary and that the contract remains with Taxback Inc for the duration of the service.
- 3. I have signed the necessary power of attorneys to authorise Taxback. Inc, and / or its subsidiary undertakings trading as taxback.com and referred to hereafter as the Agent, to prepare this tax return and represent me before the Inland Revenue Department (IRD).
- 4. I have not filed and will not file an income tax return or apply for an income tax refund for the New Zealand tax year(s)
  I have authorised taxback.com to apply for and will not authorise any other party to do so on my behalf.
- 5. I authorise the Agent to receive all correspondence from the IRD on my behalf.
- 6. I want to avail of the offer to "pay no fee up-front" when I sign up for the service. In order to avail of this option, I understand that the fee will need to be paid by me when the refund has been issued by the New Zealand tax authorities.
- 7. I authorise the Agent to receive my refund cheque(s) from the tax authorities.
- 8. I further authorise the Agent to endorse the cheques, deduct the necessary fee and to send me the remaining amount.
- 9. I understand that once my refund is processed, I will be contacted by the Agent with regard to payment options for receiving my refund and will be able to provide my bank details.
- 10. Should I receive the refund directly from any other source other than the Agent, I understand and agree that I will pay the fee due to the Agent for the work completed.
- 11. I understand that the New Zealand tax authorities will make the final decision on the value of any refund due. I understand that the Agent will provide the best estimation possible based on current tax law and information given, however this is an estimation only, not a guarantee.
- 12. I agree to and accept the terms and conditions of service as written online at www.taxback.com and to any changes in the terms and conditions which taxback.com may affect from time to time, and to the fees of the Agent which represents the services I have requested and which are provided by taxback.com and/or its affiliate companies.
- 13. I understand that information collected in writing and/or verbally for New Zealand tax return filing services can and may be used for internal auditing purposes by taxback.com and provided to the Inland Revenue Department (IRD) for external auditing purposes.
- 14. I confirm that I have given the Agent all the information needed and available to me.
- 15. I commit to updating the Agent of any change in my contact details.
- 16. I understand that taxback.com will submit my application to the relevant tax office as soon as I have been informed of the refund amount and have sent all necessary documentation. Should I wish to cancel my application, I will contact taxback.com immediately. I understand that while taxback.com will make every effort to recall my application, this may not be possible.

Signature 🎷	Date ❤️
Name in print 🎺	Date of birth 🎷