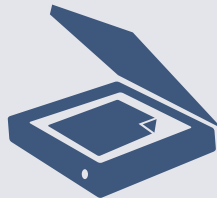


IT'S QUICK AND EASY TO GET YOUR NEW ZEALAND TAX RETURN.  
JUST FOLLOW THE STEPS BELOW:



Complete, sign and date all the attached forms.



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



Post the forms (scanned or faxed copies of them are not sufficient), along with a copy of your photo ID\* and copies of your final payment documents (payslips, Summary of Earnings, etc.) to:  
**Taxback.com,**  
**IDA Business & Technology Park,**  
**Ring Road, Kilkenny, Ireland.**

\*Acceptable ID is a legal and valid document showing your photo and signature. Such as: NZ Driver's license; NZ Passport (scan pages showing photo, name and signature); Overseas passport with NZ immigration visa/permit (scan pages showing photo, name, work or visa documentation and signature), NZ 18+ card; International Drivers Permit; NZ certificate of identity.

There are many reasons why you may be due tax back from IRD. At Taxback.com, we know that not everyone's tax affairs are the same.

That's why there is quite a lot of information in this pack. However, you only need to complete the sections that are relevant to you. If you'd like help with the form, let us know and we'll arrange for someone to talk you through filling it out.

Lastly, don't forget to refer to the handy check list below before returning the pack to us.

## CHECKLIST

**In order to apply for your 2017 tax refund we kindly ask you to follow these instructions.**

**Please note that we will need a fully completed pack before we can confirm your NZ tax position. We've put together the checklist below so you can make sure you've completed all sections and included the required documentation.**

1.  **New Zealand Tax Registration Form**

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

2.  **Authority to Act Form**

**Note:** Make sure your signature matches the one from your ID and do not fill in any additional details.

Please sign the form where marked with a ✓.

Please make sure you have ticked the boxes for all acts you give us authorisation for.

3.  **Customer Agreement**

Please fill in the form with your name and surname, sign and date it at the places marked with a ✓.

4.  **New Zealand Tax Return Form (IR3)**

Please only sign where marked with a ✓.

**Taxback.com**

Suite 1618  
24B Moorefield Rd  
Johnsonville  
Wellington 6037  
**NEW ZEALAND**

**Taxback.com**

Suite 3, Level 13  
222 Pitt Street  
Sydney, NSW 2000  
**AUSTRALIA**

**Taxback.com**

IDA Business &  
Technology Park  
Ring Road, Kilkenny  
**IRELAND**

**Taxback.com**

Unit 11, Bayford St.,  
Industrial Centre,  
Bayford Street, London  
E8 3SE  
**UNITED KINGDOM**

# NEW ZEALAND TAX REGISTRATION

EARLY ASSESSMENT

taxback.com

## CONTACT INFORMATION

First Name	Family Name
Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Date of Birth ____ / ____ / ____	Email
Phone	How did you hear about our company?
Home address and country	
Have you worked in any other country? UK <input type="checkbox"/> Ireland <input type="checkbox"/> Other <input type="checkbox"/>	Have you applied for a tax refund from there? Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Do you have any of the following income types:</b>	
Interest Yes <input type="checkbox"/> No <input type="checkbox"/>	Amount:
Dividends Yes <input type="checkbox"/> No <input type="checkbox"/>	Amount:
Self-employment, Partnerships or Companies Yes <input type="checkbox"/> No <input type="checkbox"/>	Amount:
Rental Property Yes <input type="checkbox"/> No <input type="checkbox"/>	Amount:
Income without tax deducted Yes <input type="checkbox"/> No <input type="checkbox"/>	Amount:
Trust Income Yes <input type="checkbox"/> No <input type="checkbox"/>	Amount:
Maori Authority Distribution Yes <input type="checkbox"/> No <input type="checkbox"/>	Amount:
Shareholder employee salary without tax deducted Yes <input type="checkbox"/> No <input type="checkbox"/>	Amount:
Have you applied for a refund before? Yes <input type="checkbox"/> No <input type="checkbox"/>	If Yes, please specify for which tax years:

## STATUS INFORMATION

Date of arrival in New Zealand ____ / ____ / ____	Date of departure from New Zealand ____ / ____ / ____
Address while in New Zealand	
IRD Number _____	New Zealand Visa Type
Purpose for visiting New Zealand	
Did you receive any other income apart from salaries and wages in NZ? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, what type of income?	
Do you intend to return to New Zealand? Yes <input type="checkbox"/> No <input type="checkbox"/> If yes, approx. when MONTH ____ / YEAR ____	
Which country do you plan to work and travel in next?	

## WHERE DID YOU WORK? EMPLOYER 1

Company name	City	Postcode
Address		
Telephone & Fax	Occupation	
Worked From ____ / ____ / ____ Until ____ / ____ / ____	Do you have your cumulative pay slip?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If no, would you like us to source replacements for you?* Yes <input type="checkbox"/> No <input type="checkbox"/>	Have you received a Statement / Summary of Earnings?	Yes <input type="checkbox"/> No <input type="checkbox"/>

## WHERE DID YOU WORK? EMPLOYER 2

Company name	City	Postcode
Address		
Telephone & Fax	Occupation	
Worked From ____ / ____ / ____ Until ____ / ____ / ____	Do you have your cumulative pay slip?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If no, would you like us to source replacements for you?* Yes <input type="checkbox"/> No <input type="checkbox"/>	Have you received a Statement / Summary of Earnings?	Yes <input type="checkbox"/> No <input type="checkbox"/>

**If you had more than 2 employers, please include information on a separate page.**

\* Document retrieval fee applies.

## AUTHORITY TO ACT

**This is the legal document that you must sign in order to authorise Taxback.com to act on your behalf. Please fill out the fields where you see the ✓ indicated.**

Taxpayer Name ✓			
IRD Number (if known) ✓	Date of birth ✓ ____/____/____		
Representative details: <b>Taxback.com, IDA Business and Technology Park, Ring Road, Kilkenny, Ireland</b>			
We have indicated all possible tax years a tax refund is claimable for. Please cross out any that do not apply to your experience in New Zealand.			
Type of Tax Refund	Tax years		
Income tax	1 <sup>st</sup> April 2017 – 31 <sup>st</sup> March 2018 <input checked="" type="checkbox"/>	1 <sup>st</sup> April 2016 – 31 <sup>st</sup> March 2017 <input checked="" type="checkbox"/>	1 <sup>st</sup> April 2015 – 31 <sup>st</sup> March 2016 <input checked="" type="checkbox"/>
	1 <sup>st</sup> April 2014 – 31 <sup>st</sup> March 2015 <input checked="" type="checkbox"/>	1 <sup>st</sup> April 2013 – 31 <sup>st</sup> March 2014 <input checked="" type="checkbox"/>	1 <sup>st</sup> April 2012 – 31 <sup>st</sup> March 2013 <input checked="" type="checkbox"/>
	Other		
ID verification	Please, add here the number of ID you provide for verification: _____ (driving license, passport or other document as per the instructions)		

### Acts authorised:

The representative is authorised to receive and inspect confidential tax information and to perform any and all acts that I can perform with respect to the tax types and periods described above.

**In order to proceed with your tax return we need you to tick all the check boxes in front of the below listed authorised acts.**

#### This includes:

- I grant full access to the information held by Inland Revenue on my behalf and modifying the information related to the tax types this authority gives rights for
- I authorise Taxback.com to obtain information from Inland Revenue in relation to my tax affairs
- I authorise Taxback.com to prepare, sign and submit my tax return; and
- I authorise Taxback.com to receive all correspondence from the IRD on my behalf for the linked tax types.
- I agree any payments of refunds related to the tax types in this authority are to be transferred to Taxback's Trust account
- I agree to and accept the terms and conditions of service as written online at [www.taxback.com](http://www.taxback.com) and to any changes in the terms and conditions which Taxback may effect 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.
- I understand that once my refund is processed, I will be contacted by Taxback.com with regard to payment options for receiving my refund and will be able to provide my bank details.
- I understand that this document will be used when filing my tax return and that it is valid for two years from the date of signing.
- I declare information provided is true, correct and complete.

Taxpayer Signature ✓	Date ✓ ____/____/____
Print name ✓	

#### FOR TAXBACK.COM USE

#### I declare that:

- ⇒ I have prepared this income tax return in accordance with the information supplied by the individual.
- ⇒ I have received a declaration made by the individual that the information provided to me for the preparation of this document is true and correct; and
- ⇒ I am authorised by the individual to give the information in this document to the Commissioner.

Accountant Signature	Date ____/____/____
Print name	

## CUSTOMER AGREEMENT

***The customer agreement forms the basis of the relationship between Taxback and you. It is an important document, please read the 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](http://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.

Name in print ✓	Date of birth ✓ ____/____/____
Date ✓ ____/____/____	Signature ✓

# Refunds and/or transfers

**34 Refunds** Refund from Box 32B

Overpayment of 2017 provisional tax

Add Box 34 and Box 34A

**Transfer refund to:**

- 2017 provisional tax
- this year's student loan
- someone else's income tax account.  
Are you "associated"? See page 45 in the guide

Name of taxpayer receiving your refund Year ended 31 March

- someone else's 2016 student loan.  
Are you "associated"? See page 45 in the guide

Name of taxpayer receiving your refund

- other. To transfer your refund to another period or tax type, staple a *Tax agent's request (IR 796)* form to the left of the front page of this return

Subtract Boxes 34C, 34D, 34G and 34J from Box 34B.

**34** \$

**34A** ▶ \$

**34B** ▶ \$

**34C** ▶ \$

**34D** ▶ \$

**34E** ▶ Yes  No

Their IRD number

**34F** ▶

**34G** ▶ \$

**34H** ▶ Yes  No

Their IRD number

**34I** ▶

**34J** ▶ \$

**34K** ▶ \$

The fastest and safest way to receive your refund is by direct credit to your bank account. Please check the correct bank account number is preprinted at Question 8. If you bank account isn't preprinted, please include it at Question 8.

## 2017 provisional tax

**35 2017 provisional tax** Option used (S, E or R) **35A** ▶  2017 provisional tax **35B** ▶ \$  **00**

**36 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?**

**36** ▶ No  Go to Question 37 Yes  See page 48 in the guide

**37 Is this return for a part-year?**

**37** ▶ No  Go to Question 38 Yes  (tick the appropriate situation below)

- 37A** ▶  You arrived in (or returned to) New Zealand and are now a tax resident
- You left New Zealand permanently (for more than 325 days)
- You're a student loan borrower and you've left New Zealand for 184 days or more
- 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 From **37B** ▶  Day  Month  Year to **37C** ▶  Day  Month  Year

## Notice of assessment and declaration

**38 Please read page 48 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 2016 as required under the Tax Administration Act 1994. It is also a correct statement of my earnings for the purposes of the Accident Compensation Act 2001.*

Signature

Date

**There are penalties for not filing a tax return or for filing a false return. Read page 7 in the guide.**

### Privacy

To find out what may happen to the information you provide on this form, read page 58 in the guide.

### Accident Compensation Act 2001

To understand how the information you provide on this form will be used for ACC purposes, read page 55 in the guide.

**OFFICE USE ONLY** **40** ▶ Operator code  Corresp indicator  Payment attached  Return cat  All Yes  No  Scanner