

Deceased Customer Authority



We wish to offer our condolences during this difficult time and we appreciate that dealing with financial matters can be very stressful. This form is required for us to act on behalf of a customer who has passed on.

Checklist of items we need

- This form, completed
- A copy of your photo ID
- A copy of the death certificate
- A copy of the enclosed IR625, completed and stamped by a solicitor, Justice of the Peace, or an officer who is authorised to take statutory declarations, as proof that you have authorisation to act on behalf of the estate of the deceased.

Your Details

First Name(s)

Last Name

WooHoo ID or IRD Number

Date of Birth

DD / MM / YYYY

Contact Information

Email

Phone

Mobile

Address 1

Address 2

Suburb

City

Postcode

Their Details

First Name(s)

Last Name

WooHoo ID or IRD Number

Date of Birth

DD / MM / YYYY

Important information regarding payment

Due to IRD regulations we're required to issue any tax refunds as a cheque addressed to you, as the authorised representative. This will incur an additional \$5 fee for postal security. If you would like a cheque to be cancelled we will pass on the \$35 fee, charged by our bank, to you. We're unable to pay tax refunds for a deceased client by bank transfer, as we can only transfer payments directly into an account with the same name as the customer. In these circumstances, 'the customer' is regarded as the deceased.



Verifying Your Photo ID

Due to IRD regulations the signature on this application form must match the signature provided on your photo ID (if applicable).

We accept many types of photo ID, which are listed to the right. Please make sure that all copies of photo ID are clearly legible and show your name, photo and your signature (if applicable). **All photo ID must be current and valid.**

- ✓ NZ Driver Licence
- ✓ NZ Passport
- ✓ NZ 18+ Card
- ✓ NZ Certificate of Identity
- ✓ NZ Firearms or Dealers Licence
- ✓ International Drivers Permit
- ✓ Overseas Passport with Visa



Income Details

Please tick any of the below types of income the deceased received between 1 April 2012 to 31 March 2017:

- | | | |
|--|---|--|
| <input type="radio"/> Overseas income | <input type="radio"/> Self-employment | <input type="radio"/> Untaxed income |
| <input type="radio"/> Interest (over \$200) | <input type="radio"/> Income from a shareholder salary | <input type="radio"/> Income from trusts |
| <input type="radio"/> Dividends (over \$200) | <input type="radio"/> Income from rental properties | <input type="radio"/> LAQC/LTC losses |
| <input type="radio"/> Maori Authority Distributions (over \$200) | <input type="radio"/> Income from business partnerships | <input type="radio"/> Any prior year losses to claim |

Did they purchase and subsequently sell any residential property or land, since 1 October 2015? Yes No

Did they live overseas since 1st April 2012? Yes No

If yes, please provide the dates they departed and returned to New Zealand:

Departure Date

DD / MM / YYYY

Return Date

DD / MM / YYYY

Expense Details

Please select any of the below types of income they received after 1st April 2013:

- | | | |
|--|---------------------------|--------------------------|
| Did they incur any commissions on interest or dividend income (excluding bank fees)? | <input type="radio"/> Yes | <input type="radio"/> No |
| Did they incur any interest on money you borrowed to buy shares or to invest? | <input type="radio"/> Yes | <input type="radio"/> No |
| Did they incur any premiums on loss of earnings insurance? | <input type="radio"/> Yes | <input type="radio"/> No |
| Did they incur any tax preparation fees? | <input type="radio"/> Yes | <input type="radio"/> No |

Authority to Act

Please write the deceased's full name below:

I give authority to WooHoo NZ Tax Refunds to act on behalf of The Estate of

Important information regarding tax agency linking

After completing this form, we'll be able to link to the deceased as their tax agent. This means we can act on their behalf with the IRD, and will receive any communications from IRD for them, which will be uploaded to the documents section of their WooHoo account. As you're acting as a representative at this time the WooHoo account will be created under their name, as all accounts are directly related to IRD numbers.



If at any point in the future you would like to remove us as their tax agent you will need to let us know, then contact IRD directly. You'll also need to ask IRD to change their payment preference so any additional tax refunds don't end up in our trust account. If this does happen we simply return the full refund to IRD.

IRD Authorisations

Please tick **ALL** of the following to authorise WooHoo NZ Tax Refunds as their tax agent.

- Talk to the IRD**
By ticking this, WooHoo NZ Tax Refunds Ltd will act on their behalf for all tax types (excluding Child Support) at Inland Revenue.
- Find out my wages and tax information**
By ticking this, I give permission for WooHoo NZ Tax Refunds Ltd to obtain their information from Inland Revenue.
- Update my details**
By ticking this they will be linked to WooHoo NZ Tax Refunds Ltd. As their tax agent, WooHoo NZ Tax Refunds Ltd will be able to update their details at Inland Revenue and will be able to access their information.
- Collect my IRD mail**
By ticking this I understand that their tax correspondence will be sent to WooHoo NZ Tax Refunds Ltd.
- Sort my tax**
By ticking this I authorise WooHoo NZ Tax Refunds Ltd to prepare, submit and sign tax returns and personal tax summaries on their behalf.
- Manage my refund money**
By ticking this I understand that their refund will be paid into WooHoo NZ Tax Refunds Ltd's trust account prior to the balance being refunded to me.
- Stop when I tell you**
By ticking this I acknowledge that WooHoo NZ Tax Refunds Ltd will act on their behalf until I choose to terminate this arrangement. I will contact WooHoo NZ Tax Refunds Ltd and Inland Revenue to be delinked.

By signing this form you are confirming that you have read and understood the terms and conditions included with this letter, that all information in this form is true and correct. and you acknowledge that you are appointing WooHoo NZ Tax Refunds Ltd as the tax agent for the deceased.

Your Signature

Date

DD / MM / YYYY

We're Here to Help

If you have any questions please contact us on **0800 03 04 05** or live chat to our support team directly at **woohoo.co.nz**.

Contact Information

Postal Address

NZ Tax Refunds Ltd, PO Box 28125,
Christchurch 8242, New Zealand

Phone

0800 03 04 05
(+64 3 982 9504)

Email

team@woohoo.co.nz

Fax

(03) 982 9505