

# New Application Form



Please complete this application and return it to us in the free post envelope provided.  
If you would prefer to apply online, simply visit [woohoo.co.nz](http://woohoo.co.nz) to get started.

## Your Details

First Name(s)	<input type="text"/>															
Last Name	<input type="text"/>															
WooHoo ID or IRD Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Date of Birth	<input type="text" value="DD"/>	<input type="text" value="/"/>	<input type="text" value="MM"/>	<input type="text" value="/"/>	<input type="text" value="YYYY"/>

## Your Contact Information

Email	<input type="text"/>										
Phone	<input type="text"/>					Mobile	<input type="text"/>				
Address 1	<input type="text"/>										
Address 2	<input type="text"/>					Suburb	<input type="text"/>				
City	<input type="text"/>					Postcode	<input type="text"/>				

## 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



## Payment Details

Bank Account Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account Holder Name	<input type="text"/>																
Or, payment by cheque	<input type="radio"/>	<b>Please only tick this box if you would like payment by cheque. Payment by cheque incurs additional fees. By ticking this box you agree to the \$5 postage fee as well as any other fees that may occur.*</b>															

\* Payment by cheque incurs an additional fee of \$5 for postal security. If you would like a cheque cancelled we will pass on the \$35 fee, charged by our bank, to you.

## Income Details

Please tick any of the below types of income that you 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 bursiness partnerships | <input type="radio"/> Any prior year losses to claim |

Have you purchased and subsequently sold any residential property or land, since 1 October 2015?  Yes  No

Have you lived or worked overseas since 1st April 2012? (Excluding short holidays)  Yes  No

If yes, please provide the dates you departed and/or returned to New Zealand:

Departure Date

DD / MM / YYYY

Arrival Date

DD / MM / YYYY

## Expense Details

Please only tick if you have received the below between 1 April 2012 to 31 March 2017.

Do you have any commissions on interest or dividend income (excluding bank fees)?  Yes  No

Do you have any interest on money you borrowed to buy shares or to invest?  Yes  No

Do you have any premiums on loss of earnings insurance?  Yes  No

Do you have any tax preperation fees?  Yes  No

## Donation Details

Have you made any donations greater than \$5 since 1 April 2012?  Yes  No

## Partner Details

This information is used to assess your eligibility for the Independent Earner or Working for Families Tax Credits. If you don't have a partner or you can skip this section.

First Name(s)

Last Name

WooHoo ID or IRD Number

Date of Birth

DD / MM / YYYY

## Dependent Children

Please list all children, 18 years or younger, that have been dependent on you (in your care) within the last 5 years. If your children do not have an IRD number then you'll need to download and complete an IR595 form for each child, which is available on our website in the Downloads section of the Help and Support area.

### First Child

Full Name

WooHoo ID or IRD Number

Date of Birth

When did the child enter your care?

Did you share care of the child? If you do, please share any extra details on the last page.  Yes  No

Is the child still in your care?  Yes  No

If no, when did they leave?

### Second Child

Full Name

WooHoo ID or IRD Number

Date of Birth

When did the child enter your care?

Did you share care of the child? If you do, please share any extra details on the last page.  Yes  No

Is the child still in your care?  Yes  No

If no, when did they leave?

### Third Child

Full Name

WooHoo ID or IRD Number

Date of Birth

When did the child enter your care?

Did you share care of the child? If you do, please share any extra details on the last page.  Yes  No

Is the child still in your care?  Yes  No

If no, when did they leave?

## Authorisations

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

- Talk to the IRD**  
By ticking this, WooHoo NZ Tax Refunds Ltd will act on my 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 my information from Inland Revenue.
- Update my details**  
By ticking this I will be linked to WooHoo NZ Tax Refunds Ltd. As my tax agent, WooHoo NZ Tax Refunds Ltd will be able to update my details at Inland Revenue and will be able to access my information.
- Collect my IRD mail**  
By ticking this I understand that my 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 my behalf.
- Manage my refund money**  
By ticking this I understand that my refund will be paid into WooHoo NZ Tax Refunds Ltd 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 my 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 at the end of this document, and that all information in this form is true and correct.

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

# Terms and Conditions



## 1. Definitions

In these terms and conditions, the following words have the following meanings:

"IRD" means Inland Revenue.

"PTS" means Personal Tax Summary.

"We", "us", "our" or "WooHoo" mean NZ Tax Refunds Limited.

"Working Day" means any day except a Saturday, Sunday, or public holiday in New Zealand.

## 2. Our Promise to You

1. As a valued customer we will always endeavour to treat you with the utmost respect and work with you if any issues arise to find a mutually acceptable solution.
2. We will contact you on at least an annual basis to confirm that you wish us to continue to provide you services. We won't provide services for you without obtaining your consent each year.
3. At any point you may 'opt out/delink' from our services. We will provide you with the relevant information for you to complete this process with the IRD. If you choose to opt out of our services after we have advised you of your expected refund (when we have completed the application process) or prepared your tax return you will be liable for payment of our fee.
4. We will only charge you a fee where we have undertaken work in preparation of your tax affairs. Preparation of a PTS includes calculation and estimation of your refund amount. Preparation of a tax return includes a calculation of your tax position and preparation of a tax return.
5. If you are legally required to submit a tax return we will advise you of this and outline the associated process and fees before undertaking any work in preparing your tax return.
6. We will securely store and protect any private data we have in regard to the preparation of your tax refund and/or tax return as per our Privacy Policy.
7. We will only send you emails/texts or letters as per your indicated communication preference.
8. We will not send you unsolicited marketing emails but will send you service related emails even if you unsubscribe from receiving marketing emails.
9. We will always act fairly and honourably in our preparation of your tax refund and/or tax return. If it is deemed an error on the part of WooHoo and this has caused a debt with the IRD, we will work with you to fully remedy the situation.
10. If an error is found we will fully investigate where the error has been made and provide full details to you. If the error is caused by WooHoo we will take all reasonable steps to resolve the situation. Subject to clause 2.11, if we cannot resolve the situation, we will reimburse you for any payment you may be obligated to make as a result of our error (but only to the extent that the payment obligation arose as a result of our error).
11. In relation to an error caused by WooHoo when preparing a tax return for a particular income year WooHoo will:
  - a. take all reasonable steps to resolve the error;
  - b. refund you two times the total fees paid by you to WooHoo for the preparation of that tax return; and
  - c. reimburse you for any penalties or interest charged by the IRD that you may be obligated to make as a result of our negligence (but only to the extent that the payment obligation arose as a result of our negligence). For the avoidance of doubt, WooHoo will never be liable for any increase in your liability for tax as a result of our negligence. This limitation does not restrict any rights under the Consumer Guarantees Act or Fair Trading Act.
12. We will always act to meet the obligations of the Consumer Guarantees Act, Fair Trading Act and Advertising Standards Authority Codes of Practice.

## 3. Our 60 Second Promise

1. Within 60 seconds of submitting a completed online application form you'll be able to see whether you're owed a tax refund for any of the last 5 years. We can make this promise thanks to our market leading software - Alpha.
2. If it is discovered through this process that you are legally required to

file an income tax return, we will advise you of this legal obligation and our fees to assist you to fulfil this legal obligation.

3. In order for us to fulfil the 60 second promise you must apply on-line. You must supply the correct IRD number and a valid New Zealand driver's licence or New Zealand passport. You must enter your name as stated on your IRD records.
4. The 60 Second Promise does not apply to those required to file a tax return, travellers, those with student loans, those receiving Working for Families tax credits, or those with any additional income such as interest/dividends/MAD (Maori Authority Distributions) and scheduler payments (withholding tax). The 60 Second Promise does not apply if the Veda and IRD websites are not live and your records are not accessible.

## 4. Your Obligations

1. You hereby authorise WooHoo to obtain any information - by phone, internet, fax, mail, email or e-services - that is necessary for WooHoo to perform the services requested. This may include all available information from IRD and/or any relevant information from financial institutions and your past and current employer, regarding outstanding debt, child support payment details, and additional income.
2. You acknowledge that by submitting your personal information during the application process, WooHoo is authorised to submit an application to the IRD for any refunds owed to you over the last five tax years or file a tax return where you are legally obliged to do so. You also authorise WooHoo to link with the IRD as your tax agent until the process is complete, and give authority to WooHoo to act for you in respect of the relevant tax year and on an ongoing basis (with your consent each year) until you notify WooHoo otherwise.
3. You acknowledge that WooHoo will contact you on an annual basis via the contact details you have provided to confirm that WooHoo is to continue to act on your behalf and obtain a tax refund or file your tax return.
4. You agree to provide WooHoo with such information, documents or identification as it may request from time to time.
5. You warrant that all information you have provided WooHoo is true and correct and that you have supplied all information required.
6. If you are required to file a tax return you understand that WooHoo will recommend a tax technical position based on the information you provide. WooHoo will have no liability to you if the information provided by you is incorrect, incomplete or misleading.
7. You give full permission for WooHoo to sign tax returns on your behalf (as agent). (Note that we will only do so after seeking our annual confirmation from you that WooHoo can continue to act on your behalf). Where you have a tax bill to pay to IRD, you are solely responsible for the payment of that tax (and any associated penalties, interest or other charges).

## 5. Fees and Charges

1. You have read the fees structure and agree to the following:
  - d. if you are a PTS customer, our fee will be deducted from your refund. If you do not have a PTS refund, WooHoo will not charge a fee.
  - e. if you are a tax return customer and:
    - i. you receive a tax refund that is equal to or greater than our fee, our fee will be deducted from your refund, and WooHoo will pay you the balance (if any);
    - ii. you have a tax liability, WooHoo will send you a tax invoice. You must pay this tax invoice before WooHoo will file your tax return.
2. If you are legally required to file a tax return, you will be charged a package deal as set out in our fee schedule. If there is additional work required to complete your tax return, WooHoo will advise you of the additional costs before preparing your tax return.
3. If you are a PTS customer, you acknowledge that WooHoo will receive any refunds due to you on your behalf and can deduct any monies owed to WooHoo from the refund amount.

# Terms and Conditions



- If you are entitled to a tax refund (through filing a PTS or a tax return) and your refund is not paid through WooHoo, you confirm that you will remain liable to WooHoo for the fee which would otherwise be paid for processing your tax refund and will pay the fee within 7 days of receipt of a tax invoice from WooHoo. This could be because you changed tax agents, dealt directly with the IRD, had your refund taken by the IRD for an existing debt or another reason. You agree to be responsible for any costs incurred by us in the collection of unpaid fees.
- From time to time we may make commission payments to referrers of customers to us - any such payments will be at our expense and result in no additional charge to you.

## 6. Authorisations

- You authorise WooHoo and/or its nominated debt collection agency (currently EC Credit Control) to:
- collect, retain and use any information about you from credit reporting agencies, for the purpose of assessing your creditworthiness in circumstances of debt collection; and
- share and collect information about you with Easy Giving Limited if you have used Easy Giving Limited's services.
- You authorise WooHoo to disclose information about you, whether collected by WooHoo from you directly or obtained by WooHoo from any other source, to our nominated debt collection agency (currently EC Credit Control) for the purposes of debt collection or notifying a default by you.

## 7. Communications

- All service related emails to you will be sent to the email address provided by you at registration. You will notify WooHoo of any change in your contact details.
- You consent to WooHoo contacting you for all service related reasons by electronic message. These cannot be unsubscribed from as they relate to services specific to your account.
- WooHoo only sends marketing messages to those who choose to receive them. If you would like to opt out of receiving future electronic messages from us, please use the 'unsubscribe' link located at the bottom of our email.
- If provided, you consent to WooHoo validating the authenticity of your driver's licence and/or passport through a third party.
- You understand that calls and chats with WooHoo may be recorded for training and auditing purposes and we will endeavour to remind you of this during each contact.

## 8. Authorising a Representative

- If you wish to nominate a representative to act on your behalf when dealing with us then you will need to download, fill out and mail us the completed form, which is available from our website.

## 9. Three Working Day Payments

- If you are a PTS customer, WooHoo will use its best endeavours to pay you your refund (less our fees) within 3 Working Days from the date we receive your completed application. Three Working Day payments (where available) are subject to the following additional terms and conditions:
  - You understand that the prepayment of your tax refund is being financed by WooHoo.
  - In the unlikely event that an error occurs (whether outside of our control or due to an internal error) and the refund received from the IRD is lower than the amount paid by WooHoo to you, you will repay both the overpaid upfront amount and any fees due to WooHoo.
  - If you receive Working for Families Tax Credits or pay child support or have debts with the IRD, you are not entitled to the 3 Working Day payments.
  - You must provide a valid New Zealand bank account to be eligible.
  - You must have a valid New Zealand driver licence or New Zealand passport to receive any refunds within 3 Working Days.
  - You acknowledge that this offer is subject to the IRD's availability
  - This offer does not apply for any tax year until the IRD begins processing PTS requests for that year.
  - If you are required to file a tax return you will not be eligible for this 3 Working Day payment.
  - You authorise WooHoo and/or its nominated debt collection

agency (currently EC Credit Control) to collect, retain and use any information about you from credit reporting agencies, for the purpose of assessing your creditworthiness in circumstances of debt collection.

- You authorise WooHoo to disclose information about you, whether collected by WooHoo from you directly or obtained by WooHoo from any other source, to our nominated debt collection agency (currently EC Credit Control) for the purposes of debt collection or notifying a default by you.

## 10. Privacy of Your Data

- WooHoo ensures that all client information is held as private and confidential. Information collected in writing and/or verbally for tax return filing services can and may be used for internal auditing purposes by WooHoo, provided to the IRD for external auditing purposes, used for the purpose of third party identity verification with approved organisations such as Veda, and shared with nominated debt collection agencies such as EC Credit Control for the purpose authorised by you as outlined in clause 6. Further details are contained in our privacy policy.

## 11. Cancellation

- By completing your application for a tax refund or tax return you are appointing WooHoo as your tax agent until further notice. If you change your mind or wish to revoke that appointment you can advise us at any time that you no longer want WooHoo as your tax agent. If you choose to remove WooHoo as your tax agent after we have advised you of your expected refund (when we have completed the application process) or prepared your tax return you will be liable for payment of our fee.

## 12. Complaints

- Your satisfaction is important to us. Please read our complaints procedure and let us know if you think we've made a mistake or if you are not satisfied with our service. Full details on the process and policy available to you can be found on our website.

## 13. Statement of Disclaimer

- We have not audited or reviewed the information provided and therefore neither we nor any of our employees accept any responsibility for the accuracy of the materials from which the PTS's or tax returns have been prepared. Further, the PTS and tax returns have been prepared at the request of, and for the purposes of the client only, and neither we nor any of our employees accept any responsibility on any ground whatever, including liability in negligence, to any other person, except where required by consumer law.

## 14. Updates and Changes

- We reserve the right to update our terms and conditions or fees from time to time on 10 days' notice to you (via email and on our website), but if:
  - your tax refund or tax return is already in progress for a tax year (Current Tax Year) at the time we notify you; or
  - you have taken active steps towards providing us with the relevant information we require to carry out our services for the Current Tax Year at the time we notify you,
- These changes won't apply to the services we are providing to you for your Current Tax Year.
- If the changes notified in accordance with clause 14.1 do apply to you but you don't agree with them, you may cancel our services without penalty by notifying us before the new terms, conditions or fees are stated to come into effect.
- You will be asked to agree to our current set of terms, conditions and fees before we begin to provide services to you. If we notify you that our terms, conditions and/or fees have changed in accordance with clause 14.1 and you do not cancel our services in accordance with clause 14.2, you will be deemed to have accepted the updated terms, conditions and/or fees.