



Inland Revenue Registered Intermediary

To act for your clients with Inland Revenue you need to be either a Registered Intermediary or a Nominated Party. Being be an **Inland Revenue registered intermediary** has many advantages. This blog covers:

- Why you should be an Inland Revenue Registered Intermediary
- What type(s) of Inland Revenue intermediary you can be
- How to use 2Shakes to help when you register
- Frequently Asked Questions about 2Shakes and Inland Revenue.

If you are already a registered intermediary then find out more about how 2Shakes gets clients [IR Authority here](#).

Why get registered?

IR registered Intermediaries can access more IR services, quicker. Providing a much better service to clients. When registered you'll get:

- Recognised by IR, so you can communicate with IR on behalf of your clients
- A single sign on in myIR login for all client's notifications, correspondence, returns and details.
- Access to additional reports, such as client list reports, agency activity reports, web logon reports.
- Ability to link your new clients (after sign up) to get online access
- Access automatically set up to any new account types you register for your clients
- Bulk file PAYE for multiple clients
- Asked your help to test new products or services offered by Inland Revenue

In the past, Inland Revenue only recognised Tax Agents. But this has been widened to Bookkeepers, Payroll and other intermediaries to better reflect client's choices and changes in the accounting sector. If you're a bookkeeper in particular, it's worth looking at Inland Revenue's guides on [Becoming an IR registered bookkeeper \(IR1064\)](#) or [Register as a Bookkeeper \(IR1063\)](#).

What type of Inland Revenue Registered Intermediary should you be?

IR Intermediary



Bookkeeper



Tax Agent



Payroll

More than 10 clients

- Tax Agent, and/or
- Registered Bookkeeper, and/or
- Payroll Intermediary, and/or
- Other

2Shakes captures you proof of authority to act from clients.

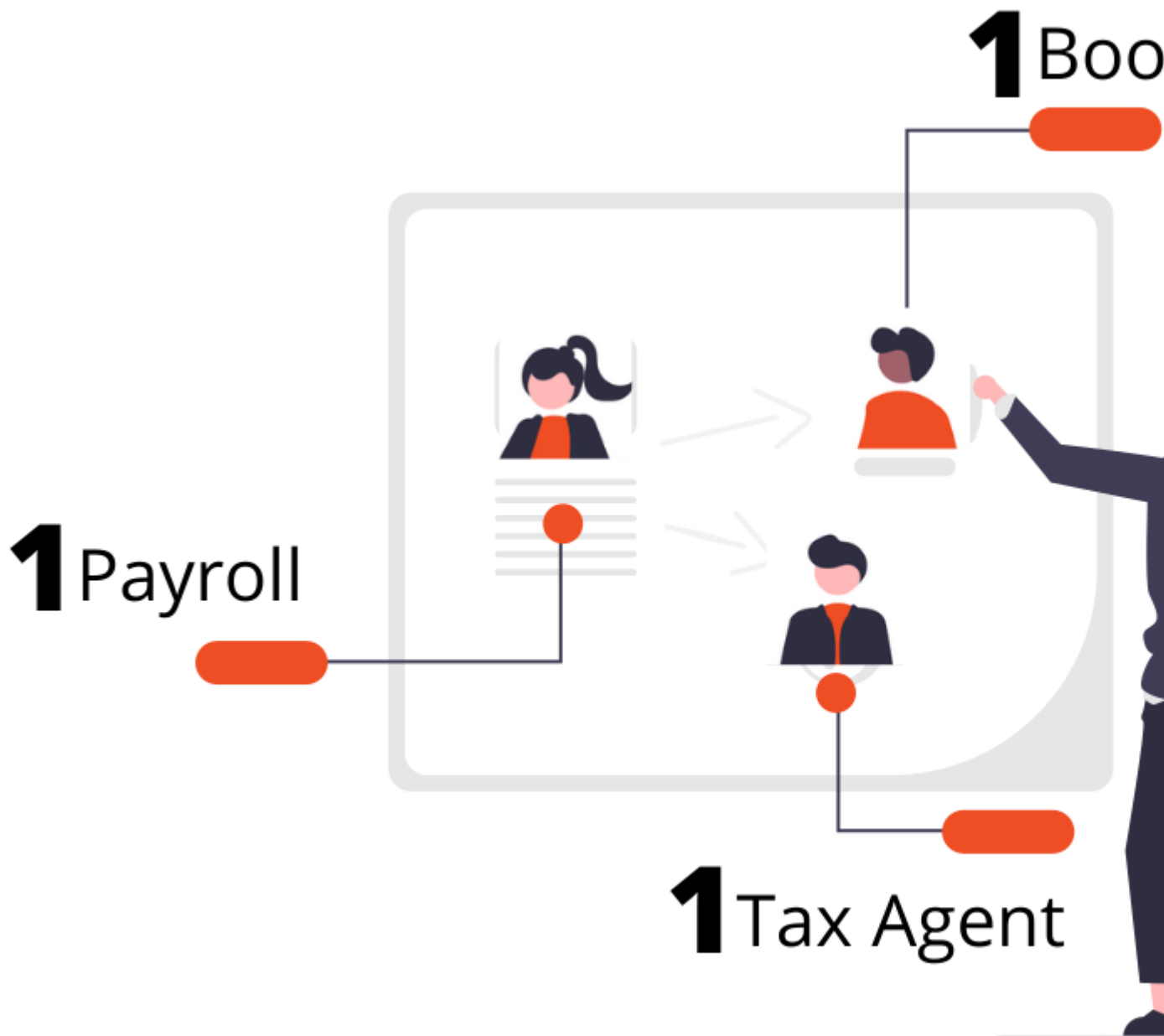
Less than 10 clients

Nominated Party

Don't have 10 clients yet? Start as a nominated party. 2hakes helps with the IR 597 form and stores them to help you register when you have 10 clients.

A clients can have 1 of each of these 4 intermediary types

Inland Revenue allows each client tax number to be associated to 1 of each intermediary type. So, if your client works with you for their annual tax returns, but asks someone else to do their payroll, and someone else to do their bookkeeping and GST all these can't all be the clients tax agent! But they can all connect to the client online through myIR, if one is a tax agent, and one is a registered bookkeeper and one a registered payroll intermediary type.



Register as more than one type of IR intermediary

It may be useful for you considered registering as more than one type of intermediary with IR. So, you can sometimes offer a client services alongside another intermediary. For example, offering payroll services while someone else providing tax agent services. Then offer tax agent services to other client who uses someone to do their bookkeeping and administration.

IR Registration – What you'll need

To apply for registration you'll need work through the following 3 steps:



IR768

Complete [Declaration for an Intermediary \(IR768\)](#)

Log into MyIR and click *I want to...* then under *Registration, Application and Enrolment* select *Apply to be an Intermediary*. Enter your details and professional memberships and then upload completed and signed [Declaration IR768](#) forms for each [key holder](#) and one for the organisation.



A 2 A

An Authority to Act template

When you use 2Shakes and select Inland Revenue your agreements will (by default) include the Inland Revenue's recommended wording for your clients to sign to give you Authority to Act. You can upload a copy of one of your own 2Shakes agreements here or download our example below to use.

[2Shakes agreement & A2A for IR example](#)



10 x IR#

Names and IRD number of 10 clients.

If you filter your 2Shakes dashboard to show **Sign Ups** that are **Complete**. Copy the full name and IR numbers for each client from the top of each agreement into your application.

Search for Client

Search for Person

Biometric IDV

Client Name ✕

From: ✕

Sign up

Include Archived

AML only

Allow delete

Pe

Dr



Found 36 records. Current page: 4 / 4 Results per page

Client name	Sign up	AML	Status
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THE ALARM LIMITED

Andrk BUIS



Complete

Brent IVOR

MCGREGOR RIGGING LIMITED

GREEN MCGREGOR TRUST

MCGREGOR RIGHTS LIMITED

Ann Added Person WRIGHT



Complete

Kenneth MCGREGOR

Lorenzo Edward Columbano GREEN

Ralph Julian GREEN

Veronica Silvia GREEN

NOTE: This screen shot the dashboard shows 2 completed sign ups. One agreement has 3 client IR#, the second has 8 IR#.

Frequently Asked Questions

This section includes some of questions that are commonly asked about Inland revenue authority to act and 2Shakes.

Getting IR Authority Signed

Can you sign an IR authority with an electronic signature? What does an electronic signature look like?

IR accept 2shakes electronic signatures. For an electronic signature it actually doesn't matter what the signature looks like on screen. It doesn't matter if it was signed on screen, or typed, or even if it looks blank – the electronic signature can still be valid. The key is that the agreement says electronically signed on 2Shakes with a reference number. You find out more about electronic signing on the 2Shakes website.

With 2Shakes everyone's signatures are on the same agreement. Is it okay with Inland Revenue for multiple people to sign the same authority document?

At the top of each completed agreement is the full name and IR number of each person and entity on it. Each person who signs with 2Shakes is shown the IR authority statement and asked to confirm it when they sign. This forms a valid IR authority. Find out more information [here](#).

Do I need everyone (from the company or the trust) to sign?

IRD want the signature of the person (or people) who have authority to represent the company or trust.

For the vast majority of limited companies one director is enough. But very occasionally a company may require all directors to sign. The director of the company will know. It is worth confirming with your client that a single director has authority to sign on behalf of the company.

Trusts often require multiple trustees to sign. You will need to see the trust deed. You can refer to IR's correspondence guidelines. If a single trustee is signing then there needs to be resolution in place that allows for this.

Managing Proof of IR Authority

Do I need 10 clients, or 10 IR numbers to register?

You need to have 10 clients IR numbers, not 10 agreements. It is common to have several IR numbers on the same agreement in 2Shakes.

Do I need to get IR authority statements re-signed each year? Do I have to do an annual IR authority renewal?

An IR authorities is normally indefinite, unless there has been an end date on it. IR doesn't require an indefinite authority to be periodically redone.

However, if you are a member of a professional body, they might require you to re-engage your client periodically and reconfirm IR authority as part of this process.

If I use 2Shakes, do I still need a separate form for IR authority to act?

No – the 2Shakes agreement meets IRD correspondence guidelines for authority to act.

My client needs my help to get set up with IR. If I am applying for an IR number for my client, can I get IR authority set up before the IR number is set up?

Your client needs an IR number before you can apply for IR authority. If you are helping someone set up their IR number and you really want to have an agreement in place first then you can sign them up without an IR authority, but only include services and fees. You can even add the service of setting up of an IR number on this initial agreement.

Then when the IR number is set up, you can do a free renewal in 2Shakes and add the IR authority in.

When I apply to be a registered bookkeeper, I am asked to provide a template of my authority letter. But I don't use a letter – I use 2Shakes so what do I show them?

You can upload a copy of one of your own 2Shakes agreements here or download our example below to use.

[2Shakes agreement & A2A for IR example](#)

Inland Revenue want specific wording on the authority. How does IR wording compare to the wording in 2Shakes? Is the wording I use in 2Shakes correct.

Yes of course, 2Shakes worked with IRD to make sure that we worded the IR authority statement correctly. Find out more information [here](#).

Identify clients for IR (& AML CDD)

Do I need to verify the identity of clients? If I don't need to do AML CDD, so do I need to do identity checks to get IR authority?

Yes, you need to verify the identity of your clients when you get IR authority to act for them. In fact, it Yes, has always been an IR requirement that you check someone is how they say they are before you can act for them.

Identity fraud is a risk we all need to avoid. The bar is being raised constantly over what is required to do this to make sure Identity Verification is robust enough.

In 2Shakes when you select a govt authority, you are prompted to confirm identity in the same way you would for AML customer due diligence.

If I registered as an IR intermediary does that mean I have to be an AML reporting entity too?

The requirement to be an AML reporting entity is dependent on the services you perform for clients. If you don't perform tax transfers or any other AML in scope services then you do not need to be an AML reporting entity.

When you register as an IR intermediary you have the 'ability' to do a tax transfer via myIR. But this does not mean that you will actually choose to do this.

You may wish to record evidence of your businesses policy NOT to perform AML in-scope services. You can email your AML supervisor to ask them to confirm.

Getting help

2Shakes worked with Inland Revenue to confirm the information on this page is correct. Our aim is to support you to meet IRs authority requirements when onboarding your clients. You can find out more information on [Inland Revenues – Becoming an Intermediary](#) web page.

If you have any other questions that we haven't answered here please contact us at support@2Shakes.co.nz. Our friendly team are waiting to help.