



Become a registered bookkeeper - Te kaikaute

Have you thought about maximising your business offering and becoming a registered bookkeeper?

In this guide, you will find information about the benefits of becoming a registered bookkeeper and how you can apply.

What is a registered bookkeeper and what do they do?

Bookkeepers typically represent clients for GST and PAYE.

They record the financial transactions of a business and make sure records are accurate for tax purposes.

A registered bookkeeper is someone who has met the criteria and been **approved** by Inland Revenue.

What are the benefits of becoming a registered bookkeeper?

As a registered bookkeeper, you can easily act and communicate with Inland Revenue on behalf of your clients. It also makes it easier to stay on top of your clients' tax positions and offer them a seamless service.

Using an existing myIR login, you'll have a single log on to access all of your clients, receive notifications and correspondence, be able to file returns and update client details all in one place.

You can also customise your account in a way that works best for you and gain access to reporting under the tax preparer tab. Here you'll have access to a range of reports, such as:

- client list reports
- agency activity reports
- web logon reports.

Once you've completed sign up of a new client, you'll be able to link them for immediate online access and when registering them for a new account type you'll be automatically linked to it without any further action required. The option to bulk file PAYE for multiple clients will also increase efficiency for clients.

This intermediary access allows Inland Revenue to engage with you directly when testing products and services specific to you and your clients. It also means that you're more likely to be kept up to date on the latest changes via targeted messaging.

Who can apply to be a registered bookkeeper?

You can apply to become a registered bookkeeper when you have a signed authority to act from 10 or more clients (written or electronic) to complete their tax affairs or social policy entitlements.

How do I apply to become a registered bookkeeper?

To apply to become a registered bookkeeper:

1. Log in to your myIR account
2. Select 'More' beside I want to
3. Select 'Apply to become an intermediary'
4. Choose the type of intermediary you are applying to become
5. Fill out your details for your application
6. Check and declare.

What you'll need:

To apply for yourself to become a registered bookkeeper you'll need:

- a completed and signed **Declaration for an intermediary - IR768**
- the full names and IRD numbers for 10 clients, and
- your authority to act template.

To apply for a non-individual to become a registered bookkeeper you'll need:

- the names and positions of all key officeholders, and
- a completed and signed **Declaration for an intermediary - IR768** for each key office holder, and a separate declaration on behalf of the entity, and
- the full name and IRD number of 10 clients, and
- your authority to act template.

Who is a key office holder depends on the type of non-individual

- Closely held company – all shareholders.
- Partnership – all partners.
- Unincorporated body – each member of the body.
- Body corporate (other than a closely held company):
 - tax manager(s)
 - chief financial officer
 - chief executive officer, and
 - directors.

Next steps

Inland Revenue will review your application and contact you within 15 working days to discuss the outcome.

If your application is approved, Inland Revenue will be in touch to set up a visit to answer any questions and assist you with how best to utilise your new access.



ird.govt.nz

Go to our website for information and to use our services and tools.

- **Log in or register for myIR** - manage your tax and entitlements online.
- **Calculators and tools** - use our calculators, worksheets and tools, for example, to check your tax code, find filing and payment dates, calculate your student loan repayment.
- **Forms and guides** - download our forms and guides.

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