

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 position 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 Intermediary centre. 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 signing up 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?

Only an Owner logon can apply to become a registered bookkeeper. If you are registering your company or partnership you need to have already set up an Owner logon under this entities IRD number - you cannot use your personal myIR logon for this, even if you have access to your company/partnership from your personal logon.

To apply to become a registered bookkeeper:

1. Log in to myIR as an Owner
2. Select 'I want to ...'
3. Select 'Apply to be an intermediary'
4. Choose the type of intermediary you want to become
5. Fill out the 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**
- 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 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.

You can register as 1 or more intermediary types if you meet the requirements.

Example: ABC Accounts is a registered tax agent but meets the requirements to register as a bookkeeper also. ABC Accounts have clients they only offer bookkeeping services to, who are linked to a different tax agent for some tax types. ABC Accounts registers as a bookkeeper in order to be able to link to the clients' accounts without impacting the tax agent link.

Customers can have more than 1 intermediary acting on their behalf. However, they cannot have more than 1 intermediary of the same type linked to the same account at any time. For example, a client can have a tax agent, bookkeeper and other representative linked to income tax at the same time. But a client cannot have a tax agent and 2 bookkeepers linked to income tax at the same time.

Using this service to link to a client's account where the same intermediary type is already linked, will override the current link.



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