

# ACC Online Agent/Advisor

## Registration form

Use this form if you are an Agent or an Advisor and wish to manage a portfolio of levy payer accounts online. If you require assistance to complete this form please call us on freephone 0800 222 991.

### Section 1 – Agent/Advisor Organisation details

|                                                                |                                |                                      |
|----------------------------------------------------------------|--------------------------------|--------------------------------------|
| Agent/Advisor trading name (as currently registered with ACC): | <input type="text"/>           |                                      |
| Agent/Advisor legal name (if different):                       | <input type="text"/>           |                                      |
| ACC number:*                                                   | <input type="text"/>           |                                      |
| IR number:*                                                    | <input type="text"/>           |                                      |
| Physical address:                                              | Street <input type="text"/>    |                                      |
|                                                                | Suburb <input type="text"/>    | City + Postcode <input type="text"/> |
| Postal address: (if different)                                 | Street <input type="text"/>    |                                      |
|                                                                | Suburb <input type="text"/>    | City + Postcode <input type="text"/> |
| Email address:                                                 | <input type="text"/>           |                                      |
| Phone:                                                         | Area code <input type="text"/> | Business number <input type="text"/> |
|                                                                | <input type="text"/>           | <input type="text"/>                 |
| Mobile:                                                        | Code <input type="text"/>      | Mobile number <input type="text"/>   |
|                                                                | <input type="text"/>           | <input type="text"/>                 |

**Important note:** If your core business activity and classification unit is not defined as a member of one of the professional bodies listed below, you can still apply, but the functions you can perform on the website will be restricted.

- NZICA – New Zealand Institute of Chartered Accountants
- TINZ – Tax Agents Institute of New Zealand

### Section 2 – Client details

You must supply the details of at least 10 of your clients to be eligible to manage a portfolio of ACC clients. To ensure that the privacy of your client is protected, please include copies of a signed ACC 1766 – Giving access to your ACC information for each of your listed clients.

| Client ACC account name | Client ACC account number | ACC1766 attached (please tick) |
|-------------------------|---------------------------|--------------------------------|
|                         |                           | <input type="radio"/>          |
|                         |                           | <input type="radio"/>          |
|                         |                           | <input type="radio"/>          |
|                         |                           | <input type="radio"/>          |
|                         |                           | <input type="radio"/>          |
|                         |                           | <input type="radio"/>          |
|                         |                           | <input type="radio"/>          |
|                         |                           | <input type="radio"/>          |
|                         |                           | <input type="radio"/>          |
|                         |                           | <input type="radio"/>          |

#### Remember

It is important to remember to obtain authority from the clients you wish to access online before you link them to your account and keep these permissions on file in case of an audit.

Continued overleaf ...

### Section 3 – Agent/Advisor applicant details

Please supply the details of the person who will be registering for ACC Online. This person will be considered the owner of the account, and will be able to perform all ACC Online system actions. The applicant must hold a position of authority within the company.

|                                |                      |                                         |
|--------------------------------|----------------------|-----------------------------------------|
| First name:*                   | <input type="text"/> |                                         |
| Surname:*                      | <input type="text"/> |                                         |
| Title/Position:*               | <input type="text"/> |                                         |
| Affiliated professional body:* | Membership number:*  | <input type="text"/>                    |
| Email address:*                | <input type="text"/> |                                         |
| Phone:                         | Area code<br>0       | Business number<br><input type="text"/> |
| Mobile:                        | Code<br>0            | Mobile number<br><input type="text"/>   |
| Secret phrase:                 | <input type="text"/> |                                         |

\* compulsory fields must be completed.

The secret phrase must be at least 7 characters long and will need to be recalled during the activation of your ACC Online account. Please ensure it is a phrase you can easily remember, but that is also difficult for others to guess. Please ensure you print the details carefully and be aware it is case sensitive.

Please define how you would like to activate your account:  by email  by post

### Section 4 – Agent/Advisor acceptance

I declare that the information given in this form is true and correct, and that ACC is authorised to verify this information. I have approved the Agent/Advisor Applicant listed on this application.

I accept that ACC may decline any application, or revoke access from any system at any time. I have read understood and accepted ACC's conditions of use located at: <https://online.acc.co.nz/ConditionsOfUse.aspx>

I understand that the ACC 1766 - Giving access to your ACC levy information - form must be completed and signed by my client and kept on my client's file for audit. I also understand that if I am not a member of the one of the listed Professional Bodies under Section 1 of this form, I must return the completed copy of the ACC1766 - Giving access to your ACC levy information form - to ACC for client linking.

I understand that the information complies with the obligations of the Privacy Act 1993 and the Official Information Act 1982.

|         |                      |           |                                                                           |
|---------|----------------------|-----------|---------------------------------------------------------------------------|
| Name:   | <input type="text"/> | Position: | <input type="text"/>                                                      |
| Signed: | <input type="text"/> | Date:     | DD <input type="text"/> MM <input type="text"/> YYYY <input type="text"/> |

**By signing this agreement the signatory agrees that they are authorised to act on behalf of the Agent/Advisor Organisation shown in section 1 of this form.**

▶ **Send the original completed form to: ACC Business Service Centre, P O Box 795, Wellington 6140**

*In the collection, use and storage of information ACC will at all times comply with the obligations of the Privacy Act 1993 and the Official Information Act 1982.*