

ACC Assist Client Engagement

This Client engagement sets out the services that we will provide to you, including any important information you should know.

About ACC Assist

ACC Assist is an advocacy and consulting service which helps its self-employed clients – sole traders and business owners with ACC optimisation and management solutions.

Services of ACC Assist

By signing you agree to engage ACC Assist's services and you give authority for ACC Assist to link with your account/s via MyACC which will give us visibility to your account information and transaction history, it also allows us to provide management support including but not limited to:

- Conversion to cover plus extra as and when recommended/requested.
- Implementation of payment arrangements.
- Communication with ACC on your behalf.
- Invoice analysis
- CU code checks and adjustments.
- Apply for refunds.
- On going monitoring, management, and optimisation of all your ACC needs.
- Claim support.

Out of Scope

ACC Assist does not offer financial or taxation advice. We recommend you engage with your accountant and/or financial adviser. If you do not have an accountant or financial adviser, ACC Assist has referral partnerships and can refer you specialists in these areas, with your agreement.

Engagement

ACC Assist's service is an ongoing subscription-based service for a 12-month term and the subscription fees will be agreed upon at time of engagement. Due to our legal obligations no work will be undertaken until the engagement letter is signed off. Payment is required within 7 days upon engagement. Our preferred payment method is direct debit or credit card. Internet transfer is available also.

Ahead of each 12-month renewal term, our team will contact you with an account status overview and renewal information.

ACC Assist's Commitment

- Act in your best interests.
- Ensure that the information provided is suitable for you and when necessary, keep your financial adviser or accountant updated when requested.
- Maintain accurate and transparent records.
- Services are provided in a timely manner.
- Keep your personal information confidential in accordance with the Privacy Act 2020
- The information provided on this form and in the course of doing business together will only be used and disclosed for lawful purposes that are connected ACC Assist's service offering.

Termination

This Agreement will remain in place until it is terminated by either party giving the other at least thirty (30) days' written notice. At such time ACC Assist is obligated to unlink from your ACC account's in MyACC. However, if you have further time to run on your subscription you are welcome to engage with ACC Assist for unlimited support at no additional cost until the subscription renewal date. No part year refunds will be given.

Client Acknowledgement

You've reviewed this Client Agreement, and you wish to proceed with the agreed action / recommendations.

You give permission for ACC Assist to liaise on your behalf directly with ACC.

You understand that the information requested is for an analysis of your situation. It's not an application to ACC.

You understand that you need to complete our authority forms in order for us to make changes with ACC.

You hereby agree to engage with ACC Assist based on the terms of this agreement.

Client Details and Authorisation

Complete Section A with Company details:

A. Company Details:

Company Name			
ACC number – or		GST Number	
Postal Address			
Mobile Number		Email Address	

I have read and understood the above information and understand that ACC Assist will use this engagement form as authorisation to link with my ACC account, act on my behalf for the agreed action and to provide ongoing support solutions.

Your Signature		Date	
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Complete Section B if you are a Shareholder of the above company or Sole Trader:

B. Shareholder or Sole Trader Details:

Client Name			
Date of Birth			
Mobile Number		ACC number – or	
Email Address		IRD Number	
Postal Address			

I have read and understood the above information and understand that ACC Assist will use this engagement form as authorisation to link with my ACC account, act on my behalf for the agreed action and to provide ongoing support solutions.

Your Signature		Date	
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B. Shareholder or Sole Trader Details:

Client Name			
Date of Birth			
Mobile Number		ACC number – or	
Email Address		IRD Number	
Postal Address			

I have read and understood the above information and understand that ACC Assist will use this engagement form as authorisation to link with my ACC account, act on my behalf for the agreed action and to provide ongoing support solutions.

Your Signature		Date	
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