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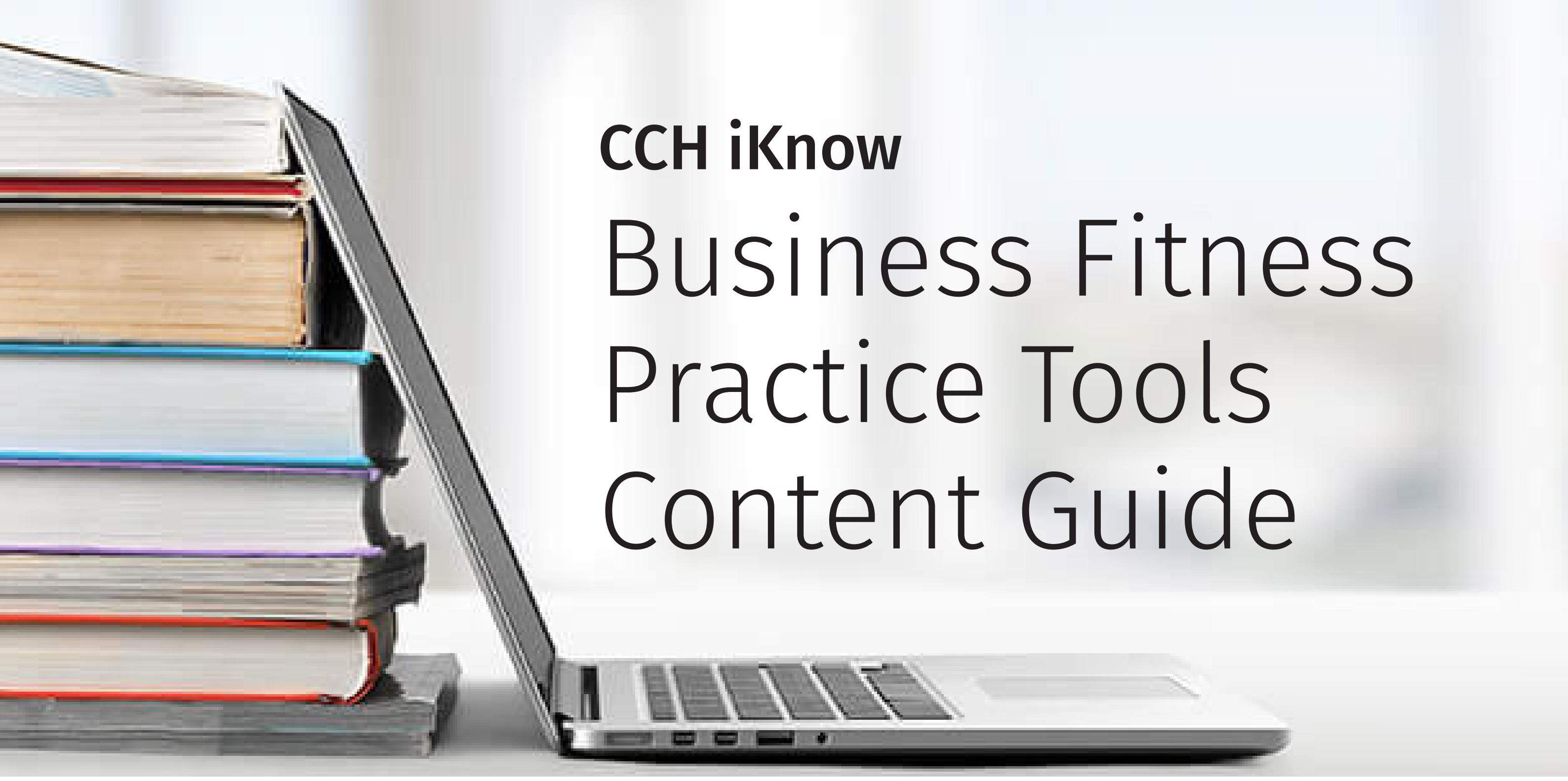
Business Fitness Practice Tools Content Guide



No two accountancy firms are the same. If you are a specialist accountancy firm, a sole practitioner or one dealing with a broad range of compliance and business advisory work, it’s easy to build a subscription package that suits your business focus and budget.

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Business Fitness Practice Tools Content Guide

Subscription packages

Select from:

- bronze
- silver
- gold

Flexible Bronze, Silver and Gold pricing packages and modules mean you only pay for the level of content you need.

Pricing Levels

Bronze — Advising Clients

- FAQs fact sheets
- White label newsletter + blog
- Social media posts (bimonthly + special alerts)
- Business advisory guides
- Tax payments wall planner

Silver (+ Bronze) — Smart tools

- Workpapers + NZ annual accounts guide
- Livestock workpapers
- Dividend workpapers
- Annual Accounts checklist builder including client questionnaire templates
- Calculators including Provisional Tax & Mixed Use Assets

Gold (+ Bronze & Silver) — Best practice procedures

- Procedures
- Quality control manual
- Letters to clients, Inland Revenue, govt depts and & professionals
- Forms, Checklists, Policies
- NCPFO – NZ Company Forms
- NZPTO – Trust Minutes, resolutions & Checklists

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Business Fitness Tools Content Guide

Packages

- **Bronze** Advising Clients
- **Silver** (+ Bronze) Smart tools
- **Gold** (+ Bronze & Silver) Best Practice Procedures

Agri-Industry

Smart tools

Workpapers

Worksheet: Electronic Workpapers Livestock Static
Worksheet: Electronic workpapers livestock
Guide: Livestock workpapers — administrator setup
Guide: Livestock workpapers — Integrated and Static
Worksheet: Rural Business Budget Cashflow

Best Practice Procedures

Ownership

Procedure: Equity partnership
Form: Information memorandum

Procedure: Sales and purchases (farms)
Guide: Sales and purchases (farms)

Procedure: Succession planning for a farming client
Worksheet: Succession planning
Form: Agenda
Form: Succession plan

Governance

Procedure: Family advisory board facilitation
Guide: Facilitating family advisory board meetings
Form: Key roles within the business
Client letter: Family advisory board info pack
Client letter: Family advisory board engagement
Checklist: Family advisory board
Checklist: Directors (for farming businesses)
Form: Family Advisory Board Agenda 1st Meeting
Checklist: Client board meeting preparation
Form: Family advisory board papers
Form: Family advisory board minutes
Form: Family advisory board action plan

Business management

Procedure: Business management cycle
Guide: Helping your client understand the business management cycle
Guide: Roles in business — helping your clients plan
Client letter: Business management cycle engagement

Procedure: Business management cycle analysis
Fact sheet: Key performance indicators
Form: Analysis of financial data: Key findings
Form: Action plan

Procedure: Business management cycle — evaluation
Checklist: Evaluation meeting
Guide: Conversation starters
Form: Evaluation key findings report
Client letter: Key findings report

Procedure: Business management cycle — monitoring

Procedure: Business needs analysis
Guide: How to engage with clients
Form: Business needs analysis — farming
Client letter: Example text for business needs analysis cover letter/email
Form: Key issues template

Procedure: Business plan preparation (for farming businesses)
Guide: Business planning
Form: Business plan
Fact sheet: Business plan preparation
Client letter: Business plan preparation
Form: Business Plan Questionnaire
Form: Business Plan: SWOT Analysis

Procedure: Business structures — new clients new entities
Form: New client business structure
Form: New clients progress chart

Procedure: Client discussion group facilitation
Guide: Client discussion / mentoring facilitation
Script: discussion group — client requested advice
Script: Discussion group — common questions
Client letter: Discussion group letter
Fact sheet: Discussion group
Checklist: Discussion / mentoring group
Client letter: Discussion mentoring group follow up letter
Script: Discussion group — follow up

Procedure: Client questionnaires
Form: Client questionnaire farmers we do GST
Form: Client questionnaire farmers they do GST
Form: Client questionnaire livestock sheet
Form: Client questionnaire livestock numbers

Procedure: Mentoring session facilitation
Script: Mentoring session — client has requested guidance
Script: Mentoring session — common questions
Client letter: Mentoring group

Agri-Industry continued

Fact sheet: Mentoring session
Client letter: Mentoring group thank you letter

Doing the Work

Procedure: Farm business access

Client letter: Farm business
Form: Farm business fax

FAQ Procedures

Procedure: Accounting terms and Financial Statements

Script: Accounting terms
Client letter: FAQ covering letter
Fact sheet: Accounting terms glossary

Procedure: Benchmarking

Script: Benchmarking
Fact sheet: Business benchmarking
Client letter: Benchmarking report

Procedure: Business management cycle FAQ

Script: Business management cycle
Fact sheet: Business management cycle
Fact sheet: Why is planning important

Procedure: Business structures

Script: Business structures
Fact sheet: Common business structures

Procedure: Cost control

Script: Cost control
Fact sheet: Cost control
Checklist: Cost Control Review

Procedure: Depreciation

Script: Depreciation
Fact sheet: Depreciation — what do I need to know?

Procedure: Employees and contractors

Script: Employees and contractors
Guide: Employees and contractors
Fact sheet: Employees and contractors — tax treatment
Fact sheet: Employees and Contractors — the difference (Contractor)
Fact sheet: Employees and Contractors — the difference (Employer)

Procedure: Employment

Script: Employment
Fact sheet: Signposts for rural employers
Fact sheet: Employment standards
Guide: Helpful links on employment, tax and paying people

Procedure: equity partnerships FAQ

Script: equity partnerships script
Fact sheet: Equity partnerships

Procedure: family businesses

Script: family businesses script
Fact sheet: Family businesses

Procedure: Farmhouse expenses

Script: Farmhouse expenses script
Fact sheet: Farmhouse expenses and tax deductibility
Fact sheet: Types of farmhouse expenses
Fact sheet: Farmhouse expenses Type One farms
Fact sheet: Farmhouse expenses Type Two farms
Flowchart: Farmhouse expenses Decision Tree
Flowchart: Type 1 and 2 Farms Decision Tree
Calculator: Farmhouse expenses

Procedure: Financial statements

Script: Financial statements
Fact sheet: Financial Statements

Procedure: Governance and family advisory boards

Script: Governance and family advisory boards
Fact sheet: Governance and advisory boards for family businesses
Fact sheet: What is a family advisory board
Fact sheet: Your responsibilities as director
Fact sheet: Your responsibilities as an independent director
Fact sheet: Governance and advisory boards: factors to consider

Procedure: Health and safety

Script: Health and safety
Fact sheet: Health and safety — ACC
Fact sheet: ACC and NZ Superannuation

Procedure: Income Equalisation Scheme

Script: Income equalisation
Fact sheet: Income Equalisation fact sheet
Fact sheet: Income Equalisation fact sheet — how it works

Procedure: Livestock valuation methods

Script: Livestock valuation methods
Letter: Livestock valuation methods
Worksheet: Livestock Valuation Herd Scheme Values
Fact sheet: Livestock — Explaining the Herd and NSC Livestock Valuation Methods

Minimum wage

Script: Minimum wage
Fact sheet: Minimum wage
Fact sheet: Minimum wage and averaging
Fact sheet: Minimum wage and empoyment requirements
Form: Agreement on benefits & reimbursements

Procedure Risk Management

Scrit: Risk management
Fact sheet: Risk management
Checklist: Risk Assessment

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Packages

- **Bronze** Advising Clients
- **Silver** (+ Bronze) Smart tools
- **Gold** (+ Bronze & Silver) Best Practice Procedures

Agri-Industry continued

	Bronze	Silver	Gold
Procedure: Succession planning FAQ			●
Script: Succession planning script			●
Fact sheet: Succession planning fact sheet	●	●	●
Fact sheet: Roles in business — helping you plan	●	●	●
Procedure: Tax			●
Script: Tax script			●
Fact sheet: FBT	●	●	●
Fact sheet: FBT fact sheet — what items are exempt from FBT?	●	●	●
Fact sheet: FBT fact sheet — calculating and filing FBT	●	●	●
Fact sheet: GST	●	●	●
Fact sheet: Registering for GST	●	●	●
Fact sheet: What we need from you to register you for GST	●	●	●
Fact sheet: Tax and paying people Fact sheet: PAYE	●	●	●
Fact sheet: Tax and paying people — schedular payments	●	●	●
Fact sheet: Tax and paying people — CAE	●	●	●
Fact sheet: Tax and paying people — seasonal workers	●	●	●
Fact sheet: Tax and paying people — allowances, benefits, lump sums	●	●	●
Fact sheet: Provisional tax	●	●	●

Knowledge Base

	Bronze	Silver	Gold
Procedure: Annual farming production cycles			●
Guide: Production cycle dairy			●
Guide: Production cycle kiwifruit			●
Guide: Production cycle beef Nth Is			●
Guide: Production cycle beef Sth Is			●
Guide: Production cycle sheep Nth Is			●
Guide: Production cycle sheep Sth Is			●
Guide: Production cycle pipfruit			●
Guide: Dairy farming KPIs glossary			●
Guide: Farming terms glossary			●
Web Links			
Guide: Web links			●

Business Advisory & Coaching Services

Client Resources

Client Newsletters

	Bronze	Silver	Gold
Accelerate — A bi-monthly Tax & Business newsletter with special alerts on relevant topics. Brand as your own and send to clients. Accelerate has both your newsletter & social media sorted!	●	●	●
Guide: Newsletter — Accelerate	●	●	●
Guide: Accelerate index	●	●	●
Guide: Accelerate newsletter — working with Word	●	●	●
Guide: Accelerate newsletter — working with email	●	●	●
Guide: Accelerate newsletter — working with the blog	●	●	●
Guide: Accelerate newsletter — working with social media	●	●	●

Best Practice Procedures

Business Advisory

	Bronze	Silver	Gold
Procedure: Accounting systems evaluation			
Checklist: Accounting systems evaluation			●
Procedure: Appraisals			
Client letter: Business appraisal			●
Guide: Business appraisals preparation	●	●	●
Checklist: business Appraisal Preparation			●
Form: Business appraisal questionnaire			●
Procedure: Business Fitness coaching programme			
Form: Business coaching referral note			●
Checklist: Business improvement	●	●	●
Guide: Top 30 issues facing SMEs			●
Script: Business coaching referral script			●
Form: Business focus meeting agenda			●
Form: Business coaching action plan			●
Client letter: Business coaching letter			●
Procedure: Business needs assessment			●
Form: Business needs analysis			●
Form: Business needs analysis — farming			●
Client letter: Business needs analysis letter			●
Sample text: Business needs analysis email example			●
Form: Business needs summary of issues			●
Flowchart: Business needs			●

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Business Advisory & Coaching Services continued

Procedure: Business plan preparation

Client letter: Business plan — engagement and quote

Procedure: Buying or setting up a business

Script: Buying or setting up a business — help me buy a business
Guide: Buying a business
Client letter: Guide to buying a business covering letter
Checklist: Due diligence checklist — buying a business
Checklist: Due Diligence — Information Request List
Script: Buying or setting up a business — help me set up a new business
Client letter: Setting up a business cover letter

Procedure: Confidentiality agreements

Form: Confidentiality agreement

Procedure: Customer advisory board facilitation

Script: Customer advisory board script
Client letter: Customer advisory board letter
Guide: Customer advisory board
Client letter: Customer advisory board invitation letter
Checklist: CAB follow up checklist
Checklist: CAB client checklist
Checklist: CAB facilitator checklist
Form: Customer advisory board key issues
Form: Customer advisory board action report
Client letter: Customer advisory board thank you letter

Procedure: Directors meetings — facilitation

Guide: Directors meetings — facilitation
Form: Directors meetings — board papers
Form: Directors meetings — action plan
Checklist: Directors' checklist

Procedure: Financing

Checklist: Business financing

Procedure: KPI monitoring

Guide: Establishing the key performance indicators in your business
Guide: Key traits of a successful business
Form: KPI analysis
Form: Retailer business review questionnaire
Form: Manufacturing business review questionnaire
Form: Service provider business review questionnaire
Form: Farming business review questionnaire
Checklist: Specialist KPIs for accommodation and foods
Checklist: Specialist KPIs for construction and engineering
Checklist: Specialist KPIs for customer service
Checklist: Specialist KPIs for HR management
Checklist: Specialist KPIs for manufacturing
Checklist: Specialist KPIs for property management
Checklist: Specialist KPIs for sales and marketing
Checklist: Specialist KPIs for wholesale and retail
Worksheet: KPI selection worksheet
Sample text: KPI monthly report

Procedure: Management control plans

Form: Management meeting agenda

Procedure: Newsletters — Accelerate

Procedure: Planning days and planning sessions

Checklist: Business development services — client selection checklist
Client letter: Planning day engagement letter
Flowchart: Business improvement process — client business
Form: Client monthly management meeting agenda
Form: Client monthly management meeting minutes
Guide: Planning event
Checklist: Business development client selection
Form: Planning event agenda
Client letter: Planning event confirmation letter
Checklist: Planning
Form: Planning event report
Form: planning event action plan
Client letter: Planning event cover letter

Procedure: Profit and cash flow forecasts

Letter: Profit and cash flow letter
Checklist: Budget preparation
Form: Profit and cash flow plan

Procedure: Profit improvement potential model

Calculator: Profit improvement potential calculator

Procedure: Property management services agreement

Form: Property management services agreement

Procedure: Sale reports

Sample letter: Sale information memorandum letter
Checklist: Sale information memorandum checklist
Form: Sale information memorandum

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Business Advisory & Coaching Services continued

Procedure: Succession planning			●
Form: Succession planning seminar invitation			●
Form: Succession and sale of business			●
Form: Succession action plan			●
Client letter: Succession planning engagement letter			●
Checklist: Succession planning			●
Procedure: Valuations			●
Guide: Business valuations — internal			●
Worksheet: Business valuation workbook			●
Client letter: Business valuation engagement (non-independent) letter			●
Client letter: Business valuation engagement (independent) letter			●
Client letter: Business valuation information required letter			●
Client letter: Business valuation draft report letter			●
Client letter: Business valuation letter of representation			●
Client letter: Business valuation report letter			●
Procedure: Virtual Chief Financial Officer (CFO)			●
Client letter: VCFO proposal			●

Coaching Library

Guide: Business fitness coaching library

Guide: Coaching Library Resources — Beginning and buying a business			●
Checklist: CAB client checklist			●
Guide: Business structures	●	●	●
Guide: Companies	●	●	●
Guide: Family trusts	●	●	●
Guide: Partnerships	●	●	●
Guide: Sole trader	●	●	●
Guide: Legislative requirements	●	●	●
Form: Working capital required		●	●
Checklist: Buying a business — checklist of issues to consider			●
Guide: Coaching Library Resources — Financial management			●
Calculator: Breakeven point		●	●
Worksheet: Simple budget		●	●
Form: Ratio analysis			●
Calculator: Debtors days outstanding		●	●
Guide: ACC levies	●	●	●
Guide: Cashflow and cost control	●	●	●
Guide: Coaching Library Resources — Accounting systems			●
Guide: Tips for keeping track of business expenses	●	●	●
Guide: Motor vehicle deductions	●	●	●
Guide: Motor vehicle business use and FBT	●	●	●
Guide: Motor vehicle deductions and GST	●	●	●
Guide: Motor vehicle deductions Partnerships and sole traders	●	●	●
Guide: Motor vehicle business use and reimbursements	●	●	●
Guide: Coaching Library Resources — Business systems			●
Guide: Business systemisation	●	●	●
Guide: Process management	●	●	●
Form: Procedure template			●
Form: Checklist template			●
Form: Script template	●	●	●
Guide: Coaching Library Resources — Human resources			●
Guide: Employment kit	●	●	●
Guide: Recruitment	●	●	●
Guide: Writing position descriptions	●	●	●
Guide: Placing an ad	●	●	●
Guide: Interviewing	●	●	●
Guide: Skills testing	●	●	●
Guide: Behavioural profiling	●	●	●
Guide: Induction	●	●	●
Guide: Building an employment agreement	●	●	●
Guide: Trial and probation	●	●	●
Guide: Performance management	●	●	●
Guide: Dismissal	●	●	●
Guide: Coaching Library Resources — Pricing and margins			●
Guide: Pricing	●	●	●
Guide: Pricing and Profit	●	●	●
Guide: Should you be increasing your prices	●	●	●
Calculator: Increasing prices		●	●
Guide: Should you be discounting your price	●	●	●
Calculator: Discounting		●	●
Calculator: Charge rates calculator		●	●
Checklist: Gross profit			●
Guide: Coaching Library Resources — Debtor management			
Guide: Debtor management kit	●	●	●
Guide: Debtor Management	●	●	●
Guide: Debtor Management Strategy	●	●	●
Script: Debtor telephone	●	●	●
Sample letter: Debtor management	●	●	●
Guide: Terms of trade	●	●	●
Guide: Credit Control	●	●	●
Guide: Debt factoring and invoice financing	●	●	●
Guide: What if debtors still don't pay	●	●	●
Guide: Legal remedies for debt	●	●	●
Guide: Coaching Library Resources — Technology in business			●
Guide: Technology in business kit	●	●	●
Guide: Software applications in small business	●	●	●
Guide: Telecommunications in small business	●	●	●
Guide: Computers in small business	●	●	●
Guide: Business sustainability in uncertain times	●	●	●
Guide: Coaching Library Resources — Customer management			●
Guide: Customer management kit	●	●	●

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Business Advisory & Coaching Services continued

Guide: Profit improvement — customer retention
Guide: Customer service
Checklist: Mystery shopper
Checklist: Appointments
Checklist: Contact
Checklist: Telephone answering
Script: Telephone — helpful telephone guidelines
Guide: Client databases
Checklist: Database management
Guide: Loyalty & reward systems
Guide: Managing queries & complaints
Form: Client Complaint
Checklist: Professional complaint handling
Guide: Surveys and market research
Guide: Market research survey planning

Guide: Coaching Library Resources — Marketing and selling

Guide: Marketing
Checklist: Marketing plan checklist
Guide: Branding & promotions
Form: Promotion plan template
Guide: Advertising
Guide: Direct marketing
Guide: Sales
Checklist: Sales visit
Checklist: Quoting checklist

Guide: Coaching Library Resources — Exporting

Guide: Exporting
Guide: Exporting web links

Guide: Coaching Library Resources — Risk management

Guide: Risk management
Checklist: Risk management audit checklist
Guide: Insurances
Checklist: Insurances
Checklist: Disaster recovery
Guide: Safeguard your business

Guide: Coaching Library Resources — Directorship

Guide: Directors

Guide: Coaching Library Resources – Time management

Guide: Managing your time
Form: Daily time log worksheet
Form: Time quadrant worksheet
Checklist: Time management
Form: Your energy cycle worksheet

Guide: Coaching Library Resources — Family businesses

Guide: Family businesses
Checklist: Family business

Guide: Coaching Library Resources — Profit improvement

Guide: How to increase profit
Guide: Profit improvement — adding value
Guide: Profit improvement and productivity
Guide: Your profit improvement potential

Guide: Coaching Library Resources — Succession planning

Guide: Succession planning

Guide: Coaching Library Resources — Selling the business

Guide: Valuation of a business
Guide: Selling your business
Checklist: Selling your business

Guide: Coaching Library Resources — Retirement planning

Guide: Retirement Planning

Company Administration

Best Practice Procedures

Procedure: Company Administration

Note: Business Fitness practice tools for company administration interlink with CCH Companies Forms and Precedents.
Guide: Company Minutes and Resolutions
Overview
Guide: Company Letters Overview

Company Formation and Setup

Procedure: Company Formation – Internet

Fact sheet: Companies and Limited Partnership
Changes fact sheet
Form: Company formation – information required
Form: Incorporation Details – Supporting Documents
Letter: New company letter
Letter: BankLink New Accounts Letter
Checklist: New company checklist

Procedure: Company Formation — Online Setup Tasks

Procedure: Company Administration — Adopting or Altering a Constitution

Company Administration continued

Procedure: Company Formation — Company Statutory Documents Folder

Guide: Statutory Requirements for a Company to Keep Records
Form: Company documents

Procedure: Company Administration — Review

Letter: Company administration review engagement
Checklist: Company administration review
Letter: Company admin review — letter to solicitor
Letter: Company admin review — letter to client
Letter: Company admin review — letter to existing client

Ongoing Company Administration

Guide: Issuing of Shares
Guide: Interests Register
Guide: Distributions

Procedure: Company Administration — Appointment of Alternate Director

Procedure: Company Administration — Change of Company Name

Letter: Certificate of Incorporation Letter to Bank
Letter: Certificate of Incorporation Letter to Client
Letter: Certificate of Incorporation Letter to IRD

Procedure: Company Administration — Change of Director's Address

Procedure: Company Administration — Change of Director's Name

Form: Company Minute Noting Change of Directors Name

Procedure: Company Administration — Change of Registered Office, and Other Company Addresses

Form: Change of Registered Office Directors Resolution

Procedure: Company Administration — Change of Shareholder's Address

Procedure: Company Administration — Directors' Appointments

Form: Company Directors Details
Letter: Company change of directors consent
Letter: Company changes letter to IRD

Procedure: Company Administration — Directors' Resignations

Letter: Resignation of director
Letter: Change of Directors Letter

Procedure: Company Administration — Dividends

Procedure: Company Administration — LTCs

Form: Election to become an LTC
Form: Election to become an LTC — Shareholders
Letter: Look through company election
Letter: LTC revocation
Guide: Look-Through Companies — Revocation of Status
Letter: LTC Revocation letter notifying owners
Letter: LTC revocation reversal letter

Procedure: Company Administration — Major Transactions

Guide: Company Administration — Major Transaction
Form: Major Transaction – Directors Resolution
Form: Major Transaction – Shareholders resolution

Procedure: Company Administration — QCs

Guide: Qualifying Companies
Checklist: QC status monitoring
Form: Resolution for QC or LAQC – Shareholders
Form: Election to Revoke QC status

Procedure: Company Administration — Removal of a Director

Form: Removal of Directors – Directors Minutes no meeting held

Procedure: Company Administration – Search for Security Interests (PPSR)

Procedure: Company Administration – Share Transfers

Checklist: Share transfer
Form: Disclosure of Personal Interest of Director
Form: Disclosure – Directors Resolution

Procedure: Company Administration – Transmission of Shares

Guide: Transmission of Shares

Company Annual Administration and Financials

Procedure: Company Administration – Annual Returns

Letter: Annual returns fee

Procedure: Company Administration – Annual Meeting of Shareholders

Form: AGM – Agenda
Form: AGM – Proxy
Form: Financial Reporting Opt Out Motion

Procedure: Company Administration – Annual Meeting of Shareholders (No Meeting)

Procedure: Company Administration – Directors Fees

Letter: Directors salaries

Company Cessation

Procedure: Company Administration – Amalgamation of Commonly Owned Companies

Guide: Qualification for short form amalgamation – Commonly Owned

Company Administration continued

Checklist: Amalgamation
Guide: Check Companies Office for Amalgamating Companies
Form: Amalgamation Director Resolution –Commonly Owned Companies
Guide: Director Resolutions – Commonly Owned Companies
Form: Amalgamation Notice to Secured Creditor – Commonly Owned Companies
Letter: Amalgamation Letter to Directors
Letter: Amalgamation Letter to IRD

Procedure: Company Administration – Amalgamation of Holding Company with Subsidiaries

Guide: Qualification for short form amalgamation – Holding with Subsidiaries
Form: Amalgamation Director Resolution –Holding Company with Subsidiaries
Guide: Director Resolutions – Holding Company with Subsidiaries
Guide: Amalgamation Guide – Subsidiary Becomes Amalgamated Company
Form: Amalgamation Notice to Secured Creditor – Holding Company with Subsidiaries

Procedure: Company Administration – Director Certificates for Amalgamation

Form: Amalgamation Director Certificate
Form: Amalgamation Director Certificate Re Creditors

Procedure: Company Administration – File Amalgamation Documents

Form: Amalgamation – Directors Details

Procedure: Company Administration – Liquidation by Directors Resolution

Procedure: Company Administration – Liquidation by Shareholders Resolution

Letter: Liquidations Engagement
Form: Deed of Indemnity to Liquidator
Form: Liquidations Report 1st
Letter: Liquidations 1st Report to Creditors
Letter: Liquidations NZ Gazette 1st
Letter: Liquidations Local Newspaper 1st
Form: Liquidations Report 6 Month
Letter: Liquidations 6 Month Report to Creditors
Letter: Liquidations IRD Tax Clearance
Form: Liquidations Report Final
Letter: Liquidations Final Report to Creditors
Letter: Liquidations Local Newspaper 2nd
Letter: Liquidations NZ gazette 2nd
Letter: Liquidations – Advice to IRD

Procedure: Company Administration – Removal from Register by Directors

Letter: Company removal initial cover letter
Letter: Company removal by directors – letter to IRD
Letter: Company removal letter – director authorised
Letter: Company administration – advice to IRD

Procedure: Company Administration – Removal from Register by Shareholders

Letter: Company removal by shareholders – letter to IRD
Letter: Company removal letter – shareholder authorised

Procedure: Company Administration – Reserve Company Name

Practice Management

Best Practice Procedures

Administration

Procedure: Banking

Procedure: Computer System

Procedure: Computer system — backups

Procedure: Computer system — restoring from backups

Procedure: Computer system – update practice software

Sample text: Practice management software — installing updates

Procedure: Correspondence – filing

Sample text: Filing correspondence

Procedure: Correspondence – writing

Procedure: Couriers

Form: Courier log

Procedure: Dealing with death

Letter: Dealing with death – letter to solicitor
Letter: Dealing with death – executor letter to IRD
Letter: Dealing with death – KiwiSaver letter
Letter: Dealing with death – letter to IRD
Checklist: Dealing with death

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Practice Management continued

Procedure: Debtor Control
Guide: Eleven Keys to Prompt Payment
Letter: Debtors – 1st letter to debtor
Script: Second telephone call to overdue debtor
Letter: Debtors – 2nd letter to debtor
Letter: Debtors – 3rd letter to debtor

Procedure: Debtor management – smartAR
Sample letter: smartAR Fee Funding sample debtors
Sample text: smartAR Fee Funding sample newsletter article
Guide: smartAR – 10 things the firm should know
Script: smartAR Fee Funding
Sample letter: smartAR application
Form: smartAR Fee Funding forms for approval
Guide: smartAR Whitepaper – Eradicate Overdue Debtors
Guide: smartAR client brochure
Guide: smartAR Banners

Procedure: Debtor receipting

Procedure: File naming and saving protocols
Sample text: File naming and saving example

Procedure: Fixed assets control
Form: Fixed asset register

Procedure: Insurance register and review

Procedure: Mail handling
Form: Mail ledger

Procedure: Office security and maintenance
Form: Key and alarm monitoring
Form: Maintenance authorisation

Procedure: Ordering goods and services
Form: Purchase order

Procedure: Payment of accounts

Procedure: Payment of accounts for the firm

Procedure: Payment of accounts – auto payments and direct debits

Procedure: Payment of accounts – desk banking
Example: Desk banking (Westpac Trust)

Procedure: Client – payment of accounts

Procedure: Payroll and PAYE

Procedure: Petty cash

Procedure: Practice management – changing firm details
Letter: Changing firm details
Checklist: Changing firm details
Letter: Changing client manager

Procedure: Reception maintenance

Procedure: Stationery and office supplies

Procedure: Telephone answering

Procedure: Timesheets

Procedure: Trust account administration
Letter: Trust account bank notice
Form: Trust account – client authorisation for deposit
Form: Trust account – client authorisation for withdrawal
Client letter: Trust account – confirmation of withdrawal of funds

Clients

Procedure: Appointments
Form: Appointment detail
Client letter: Confirmation of appointment

Procedure: Client categorisation
Form: Client categorisation
Client letter: Letter to a D client

Procedure: Contact
Script: Greeting a visitor
Form: Refreshments menu
Form: Visitor log

Procedure: Deletions
Client letter: Ethical clearance – deleted client
Checklist: Deletion of client

Procedure: Fee queries
Client letter: Fee queries invoice in order
Client letter: Fee queries credit note
Client letter: Fee queries service quality in order
Client letter: Fee queries service quality deficiency
Worksheet: Fee analysis spreadsheet
Client letter: Fee queries fee analysis

Procedure: Feedback from clients
Sample text: Feedback – covering text for letter or email
Form: Feedback on completion of work
Form: Feedback – annual feedback
Form: Feedback – service standards

Procedure: Fixed price agreement preparation
Calculator: Fixed price agreement
Client letter: Fixed price agreement
Form: Automatic payment

Procedure: myIR Secure Online Services – Client Maintenance
Form: IRD information authority

Procedure: New clients
Flowchart: New client setup
Checklist: Welcome Kit Preparation

Procedure: Meetings – new clients
Guide: Meetings – tips for a successful meeting
Guide: Why clients change accountants
Guide: Ideal client profile
Form: Meeting agenda – new clients
Form: Prospect tracking sheet
Client letter: Prospect follow up letter

Packages
- **Bronze** Advising Clients
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Practice Management continued

Form: Authority to act as accountant
Form: New client & MYOB setup
Form: New Client Detail

Procedure: New clients – administration

Sample letter: Ethical clearance letter on acceptance of engagement
Client letter: Referral thank you letter
Checklist: New clients

Procedure: New Clients – Welcome Pack

Client letter: Engagement – new clients
Client letter: New client welcome
Client letter: Our relationship
Form: Deed of guarantee for company

Procedure: New clients – setup

Procedure: Client queries and complaints

Script: Dealing with complaints
Client letter: Complaints – reply

Procedure: Client records folders

Sample text: Client records folders tabs
Client letter: Client records folders
Form: Client records folders instructions for use

Procedure: Returning records

Form: Records return cover sheet

Procedure: Client screening

Form: Client screening questions
Client letter: New Clients before initial meeting
Guide: ID and Proof of Address

Strategic

Procedure: ATE Application

Letter: ATE cover letter

Procedure: Mentor application

Letter: Registered mentor status cover letter

Procedure: Practice review preparation

Guide: Practice review preparation
Form: Practice review preparation action plan

Procedure: Strategic planning day

Form: Strategic planning day agenda
Sample text: Organisation Chart
Guide: SWOT analysis guidelines
Form: SWOT analysis
Guide: AML guidance available
Guide: What do accountants have to do to comply with the AML Act?
Checklist: Is your accounting practice captured by the AML regime?
Form: Client analysis summary
Form: Client services summary
Form: Marketing summary
Form: Trading history and KPI summary
Guide: Team effectiveness exercise
Form: Strategic planning day action plan
Form: Strategic planning day debrief
Form: Information Technology report

Marketing

Procedure: Press kits

Checklist: Press kit preparation

Procedure: Client Seminars, Webinars, Discussion and Mentoring Groups

Client letter: Seminar invitation
Form: Seminar registration
Script: Seminar invitation
Client letter: Seminar reminder
Client letter: Seminar invitation reminder
Form: Seminar booking sheet
Client letter: Seminar confirmation of registration
Form: Seminar registration reminder – onsite
Form: Seminar registration reminder – online
Form: Seminar feedback
Client letter: Seminar thank you

Policies

Areas of operation

Client relationships

Courtesy

Email

Ethics standards

Guide: Ethical standards – situations facing members on a regular basis
Client letter: Conflict of interest letter email template

Health and safety

Guide: Health and safety responsibilities chart

Mission statement

Policy: Petty Cash

Quality control manual

Letter: Annual independence declaration

Service standards for dealing with clients

The Privacy Act 1993

Knowledge Base

Rates and Thresholds Table

Web Links

Guide: Web links

HR Team

Procedure: Employment process

Flowchart: Employment process diagram

Procedure: Employment – recruitment

Form: Review practice tasks
Guide: Employing an executive assistant (EA)
Guide: Employing a client services assistant (CSA)
Guide: Employing a business manager
Form: Position analysis
Form: Position description
Sample text: Position description examples

Practice Management continued

Sample text: Position description – accountant ●
Sample text: Position description — accounting technician ●
Sample text: Position description — business advisor ●
Sample text: Position description – business manager
Sample text: Position description — client manager ●
Sample text: Position description — client services assistant (CSA) ●
Sample text: Position description — client
services manag-er (CSM) or office manager ●
Sample text: Position description — executive assistant (EA) ●
Sample text: Position description — IT manager ●
Sample text: Position description — office junior ●
Sample text: Position description — partner or director ●
Sample text: Position description — receptionist ●
Sample text: Position description — tax administration manager ●
Sample text: Position description — firm policies ●
Sample text: Position description — accounts receivable ●
Guide: Drafting and placing an advertisement ●
Form: Reference check ●
Letter: Rejection email ●
Letter: Rejection ●
Form: Employment agreement ●
Letter: Recruitment — employment agreement ●
Letter: Recruitment — offer of employment ●

Procedure: Employment — selection ●

Script: Interview process ●
Guide: Recruitment questions examples ●

Procedure: Employment – induction ●

Checklist: Pre-induction ●
Checklist: Induction itinerary ●
Guide: Team member handbook ●
Form: New team member ●

Procedure: Employment — confirmation of appointment ●

Form: Review form — month 1 ●
Form: Review form — month 2 ●
Form: Review form — month 3 ●
Form: Salary review ●
Letter: Employment — confirming position ●

Procedure: Employment — training programmes ●

Form: Individual team member training record ●
Guide: Training tools and resources ●
Checklist: Internal training ●
Form: Training feedback ●
Form: Course request ●
Form: Course review

Procedure: Employment – performance management ●

Form: Career development review ●
Form: Team member performance evaluation ●
Form: Career development action ●
Letter: Career development review salary ●

Procedure: Employment — Termination ●

Guide: Dismissal guidelines ●
Checklist: Employee leaving ●
Letter: Acceptance of resignation ●
Letter: Giving a reference ●
Form: Exit interview questionnaire ●

Procedure: Grievances ●

Form: Grievance ●

Procedure: Health and safety

– accident and incident re-porting ●
Form: Accident and incident report ●
Form: Near miss or incident report ●
Checklist: Investigating an accident or incident ●

Procedure: Health and safety – emergencies ●

Guide: Emergency evacuation map ●
Guide: Floor plan for exits fire extinguishers first aid kit and hose reels ●
Form: Local service directory ●

Procedure: Health and safety — first aid ●

Checklist: First aid kit ●

Procedure: Health and safety — guidelines ●

Procedure: Health and safety — visitors to the workplace ●

Form: Contractor induction ●

Procedure: KiwiSaver — administration ●

Letter: KiwiSaver existing employee info pack ●
Letter: KiwiSaver IRD advice existing employee joined ●
Form: KiwiSaver information ●

Procedure: Leave entitlement ●

Form: Application for leave ●
Form: Calendar ●

Procedure: Personnel file ●

Form: Employee personal file tabs ●
Checklist: Employee personal file ●
Form: Expense reimbursement claim ●
Form: Standard career development ●
Form: Team member monthly report ●
Form: Client manager monthly report ●
Form: Team member annual feedback ●
Form: Holidays cash up request ●
Form: Transfer of public holidays request ●
Form: Team member change of details ●
Form: Previous employment history ●
Form: Current employment history ●
Form: Skills and qualifications record ●
Form: Training record ●
Form: Absence and lateness record ●
Form: Benefits ●

Procedure: Team – meetings ●

Form: Team meeting minutes ●

Procedure: Training – annual schedule ●

Form: List of training providers ●

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Business Fitness Tools Content Guide

Packages

- **Bronze** Advising Clients
- **Silver** (+ Bronze) Smart tools
- **Gold** (+ Bronze & Silver) Best Practice Procedures

Tax and Accounting

Best Practice Procedures

Compliance

Procedure: ACC — administration and advisory

Guide: Comparing ACC CoverPlus extra with ACC CoverPlus

Guide: ACC access types

Procedure: ACC — market the administration and advisory service

Client letter: ACC pre-engagement

Client letter: ACC engagement

Guide: ACC engagement

Procedure: ACC – register and activate MyACC

Guide: Key features of MyACC

Client letter: ACC updated authority for existing clients

Procedure: ACC – review and implement cover

Procedure: ACC – applying for CoverPlus Extra

Guide: ACC CoverPlus Extra clients that will benefit

Guide: ACC CoverPlus Extra acceptance levels

Client letter: ACC CoverPlus Extra letter to client

Letter: ACC applying for ACC CoverPlus Extra

Letter: ACC acceptance form

Procedure: ACC – manage clients' levies

Checklist: ACC – invoices

Guide: ACC payment options

Client letter: ACC CoverPlus levies due for payment

Client letter: ACC CoverPlus extra levies due for payment

Client letter: ACC workplace cover levies due for payment

Letter: ACC multiple employer adjustment

Form: File note

Procedure: ACC – oversee claims

Procedure: Annual accounts process

Procedure: Annual accounts – collect client records

Form: Annual accounting scheduling

Client letter: Client checklist

Client letter: Year end questionnaire cover letter for C and D clients

Client letter: Year end questionnaire cover letter – remote clients

Form: Records and documents required

Script: Setting up the annual planning Meeting – A and B

Script: Setting up the annual planning meeting – remote

Client letter: Engagement

Client letter: Records required

Client letter: Engagement — cover letter

Client letter: Client end of year reminder

Procedure: Annual records checklist builder

Form: Annual records checklist builder

Form: Checklist builder hub

Procedure: Annual accounts — prep client records and accounting job

Script: Setting up the annual planning meeting – C and D

Form: Workflow entry sheet – annual financial statements

Procedure: Annual accounts – workpapers

Worksheet: Electronic workpapers

Worksheet: Electronic workpapers static

Procedure: Annual accounts – draft financials

Guide: Special purpose reporting guide

Letters: Insolvency letter to directors

Checklist: Finalisation – company

Checklist: Finalisation – trust

Checklist: Finalisation – partnership and sole trader

Checklist: Finalisation – individual and non-resident

Client letter: Financial Statements Reporting

Client letter: Financial Statements Reporting - Company

Client letter: Financial Statements Reporting – Trust

Worksheet: Tax payment wallplanner

Procedure: Annual accounts – collate client pack

Worksheet: Client taxation cover sheet

Letter: Bank letter

Procedure: Balance date – changing

Guide: Election to change a balance date

Procedure: Business structures

Procedure: Business structures — making changes for clients

Checklist: Change of entity

Client letter: Business structures letter to farmer

Checklist: Change to company — farming

Client letter: Business structures letter to trader

Checklist: Change to company — trading

Procedure: Client annual service plan

Form: Annual client service plan

Procedure: Client — general ledger set up

Procedure: Client – printing and binding reports

Procedure: Client bank accounts

Guide: Operating client bank accounts

Client letter: Client bank accounts – sample letter 20ths

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Business Fitness Tools Content Guide

Packages

- **Bronze** Advising Clients
- **Silver** (+ Bronze) Smart tools
- **Gold** (+ Bronze & Silver) Best Practice Procedures

Tax and Accounting continued

Client letter: Client bank accounts — sample letter rental
Client letter: Client bank accounts — sample letter emergency
Client letter: Client bank accounts — terms of engagement
Form: Client bank accounts — register of signing authorities

Procedure: Client profiles

Form: Client profile form sole trader
Form: Client profile form partnership
Form: Client profile form company
Form: Client profile form trust

Procedure: CRS obligations for accountants

Guide: CRS guidance for accounting firms
Guide: CRS – Trusts and corporate trustees

Procedure: Depreciation – building fit-out

Checklist: Depreciation - Transitional Rule Eligibility

Procedure: Dividend preparation

Worksheet: Dividend electronic workpapers

Procedure: FBT – preparing returns

Calculator: FBT calculator

Procedure: FBT – workflow reports

Procedure: Financial statements

Procedure: Financial statements – client questionnaires

Form: Client questionnaire business we do GST
Form: Client questionnaire business they do GST
Form: Client questionnaire trust we do GST
Form: Client questionnaire trust they do GST
Form: Client questionnaire rental
Form: Client questionnaire individual
Form: Client questionnaire Sole Trader
Form: Client questionnaire NZ tax residency
Form: Client questionnaire farmers we do GST
Form: Client questionnaire farmers they do GST
Form: Client questionnaire livestock sheet
Form: Client questionnaire livestock numbers

Procedure: Financial statements – reporting requirements

Flowchart: Decision tree to identify which reporting framework applies to an entity
Flowchart: Company reporting decision tree
Financial reporting IRD minimum requirements
Form: Compilation report – example
Form: Compilation report – basic template
Form: Compilation report – annual accounts – GAAP companies
Form: Compilation report – annual accounts – companies SP
Form: Compilation report – annual accounts – voluntary GAAP
Form: Compilation report – annual accounts – non-companies special purpose
Form: Compilation report – budget & cash flow
Form: Compilation report – monthly management ac-counts
Form: Compilation report – profit & cash flow
Form: Compilation Report – Sale Information Memorandum

Procedure: Financial statements – interims

Procedure: GST – advising changes to IRD

Letter: Advice of business changes to IRD
Letter: Advice of GST changes to IRD

Procedure: GST – annual reconciliation

Letter: GST adjustment

Procedure: GST – audit

Guide: Shortfall penalties

Procedure: GST – private use adjustments

Calculator: GST apportionment
Worked example: GST apportionment calculator

Procedure: GST – private use adjustments sole traders

Procedure: GST – private use adjustments trusts and partnerships

Procedure: GST – private use adjustments sole traders trusts and partnerships

Procedure: GST – processing assessments

Client letter: GST refund

Procedure: GST – processing large refunds

Checklist: GST – property sale and purchase

Procedure: GST – return control

Form: GST – GST returns filed report

Procedure: GST – Returns and management reports

Checklist: GST – client questionnaire
Checklist: Management reports

Procedure: GST – returns due and mail merges

Client letter: GST letter to client requesting GST infor-mation
Form: GST fax or compliment slip

Procedure: GST – risk management

Client letter: GST – engagement
Checklist: GST for high risk clients

Procedure: GST and provisional tax payment options

Client letter: Provisional tax payment options
Guide: Income tax – payment dates

Tax and Accounting continued

Guide: GST ratio method
Client letter: GST ratio method

Procedure: Income equalisation deposit scheme

Calculator: Income equalisation deposit scheme cost benefit
Guide: Income equalisation deposit (IED) scheme
Form: Income Equalisation Adverse Event

Procedure: Income tax – audit

Form: IRD health check

Procedure: Income tax – filing elections with IRD

Client letter: Election to enter herd scheme
Client letter: Election to add additional classes of livestock
Client letter: Election to defer fertilizer expenditure
Client letter: Election to claim deferred fertiliser expendi-ture
Client letter: Election as provisional taxpayer
Client letter: Election not to depreciate an asset

Procedure: Income tax – filing returns

Worksheet: Tax return filed report example
Worksheet: Tax return filed report

Procedure: Income tax – foreign investments

Calculator: FIF
Worked example: FIF training guide
Guide: FIF tax rules for individuals and family trusts

Procedure: Income tax – foreign superannuation

Client letter: Foreign superannuation
Flowchart: Foreign superannuation decision tree

Procedure: Income tax – preparing tax forecasts

Client letter: Tax forecast reporting

Procedure: Income tax – receipting of income tax payments

Procedure: Income tax returns

Worksheet: Tax return planning
Guide: Sale of land – tax consequences
Flowchart: Brightline test (sale of residential land within 10 years)
Flowchart: Scheme for Making a Profit
Flowchart: Rezoning
Flowchart: Purpose of Resale
Flowchart: Dealers
Flowchart: Developers
Flowchart: Builders
Flowchart: Subdivisions
Checklist: Income tax return preparation – IR4 company
Checklist: Tax return preparation – IR7L/P
partnerships and look-through companies (LTCs)
Checklist: Tax return preparation – IR6 estate or trust
Checklist: Tax return preparation – IR3 individual
Checklist: Tax Return Preparation – IR10

Procedure: Inland revenue — processing assessments

Client letter: Income tax request for reassessment – rental losses
Client letter: Income tax request for reassessment – dividends
Script: Tax refund error
Client letter: Tax refund incorrect period
Client letter: Tax refund incorrect period client authority

Procedure: Interest and principal calculators

Calculator: Interest
Calculator: Mortgage interest

Procedure: IRD – applying for IRD registrations

Procedure: IRD – disputes resolution process

Guide: Tax disputes overview
Flowchart: Taxpayer issued NOPA
Flowchart: IRD Issued NOPA
Guide: NOPA phase
Letter: NOPA
Letter: Disputes letter to IRD – acceptance
Letter: Disputes Letter to IRD – part Acceptance
Guide: NOR phase
Letter: NOR
Letter: Disputes letter to IRD – rejection
Guide: Conference phase
Guide: Opt out phase
Guide: SOP phase
Letter: SOP Letter
Guide: Adjudication phase
Form: Disputes Process File Tabs
Form: Disputes – records required
Worksheet: Disputes – NOPA
Worksheet: Disputes – NOR
Letter: Disputes letter to IRD – opt out request

Procedure: Loss offsets and subvention payments

Guide: Loss offsets and subvention payments
Form: Subvention agreement
Form: Subvention Payment Notice

Procedure: Mixed use assets – calculate GST and income tax

Calculator: Mixed use assets

Procedure: Partnership formation

Client letter: Partnership letter with checklist
Checklist: Partnership formation
Form: Partnership – Information Required
Form: Limited Partnership – Information Required
Form: Partnership Agreement
Client letter: Partnership Letter with Enclosures
Checklist: New Partnership

Procedure: PAYE – returns due report

Tax and Accounting continued

Procedure: Provisional tax — managing payments
Client letter: Income tax or provisional tax due
Client letter: TMNZ Reassessment Payment
Client letter: TMNZ Tax Purchase Payment
Client letter: TMNZ Tax Finance
Client letter: TMNZ Tax Deposit

Procedure: Provisional tax — voluntary payments up to 2017 income year

Procedure: Provisional tax — voluntary payments 2018 income year onwards

Procedure: Provisional tax calculation
Calculator: Provisional tax

Procedure: Provisional tax estimates

Procedure: RWT – returns due report

Procedure: Sales and purchases (business)
Guide: Sales and purchases (business)

Procedure: Shareholder remuneration review
Checklist: Shareholder remuneration
Client letter: Shareholder remuneration review

Procedure: Statements of financial performance
Worksheet: Statement of financial performance

Procedure: Student allowances – statement of income
Form: Student allowance – detailed statement of income
Letter: Statement of income
Client letter: Student allowance letter to client

Procedure: Tax – engaging a tax specialist
Client letter: Engagement letter introducing tax specialist

Procedure: Tax – NZ residence
Checklist: Tax – NZ residence
Calculator: Tax – NZ residence
Worked example: Tax – NZ residence

Procedure: Tax – resolving tax debt process
Flowchart: Tax Debt Process Map
Form: Tax debt cover sheet
Form: Tax debt – records required
Flowchart: Resolving tax debt
Guide: Tax debt – meeting preparation guide
Client letter: Tax debt – fee proposal
Letter: Summary of account
Guide: Using the tax debt decision tree
Guide: Payment guide – pre-emptive
Guide: Payment – full payment
Guide: Payment – lump sum and instalments
Guide: Payment – instalment
Guide: Payment – lump sum and write off
Guide: Payment – lump sum instalment and write off
Guide: Payment – instalment and write off
Guide: Payment – hardship relief
Guide: Payment – remission of penalties
Letter: Tax debt – instalment arrangement
Letter: Tax debt – full payment
Letter: Tax debt – lump sum and instalments
Letter: Tax debt – lump sum and write off
Letter: Tax debt – lump sum instalments and write off
Letter: Tax debt – instalment and write off
Letter: Tax debt – hardship and write off

Client letter: Tax debt – remission

Procedure: Tax – finalising tax debt
Client letter: Tax debt – arrangement confirmation
Letter: Tax debt – acknowledgement to IRD

Procedure: Tax – risk management review

Procedure: Tax – sale and purchase of land
Checklist: Purchase of land
Guide: Purchase of land – tax consequences training
Checklist: Sale of land
Guide: Sale of land – tax consequences training

Procedure: Tax refunds
Script: Tax transfer
Client letter: Tax refund transfer
Client Letter: Tax Refund Transfer Confirmation
Form: Tax refund client authority
Client letter: Tax refund authority
Client letter: Tax refund fees deducted
Client letter: Tax refund fees offset
Client letter: Income tax refund
Client letter: Tax refund direct credit

Procedure: Use of money interest calculation
Calculator: Use of money interest 2017 and prior
Calculator: Use of money interest

Procedure: Workflow – logging client work

Procedure: Working for families tax credits
Checklist: Working for families tax credit eligibility
Guide: Working for families tax credit

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Business Fitness Tools Content Guide

Packages
- **Bronze** Advising Clients
- **Silver** (+ Bronze) Smart tools
- **Gold** (+ Bronze & Silver) Best Practice Procedures

Tax and Accounting continued

Item	Bronze	Silver	Gold
Procedure: Working for families tax credits calculation			●
Checklist: Working for families calculation			●
Calculator: Working for families kit			●
Procedure: Workpapers and calculators			●
Workpapers and calculators as listed above, as well as:			●
Calculator: Interest Limitation			
Calculator: Loss limitation kit		●	●
Calculator: Ring-Fencing Rental Losses		●	●
Worksheet: RWT on interest input		●	●
Calculator: Simple tax		●	●
Worksheet: COVID-19 Wage Subsidy Calculation		●	●
Procedure: Workflow – logging client work			●
Procedure: Working for families tax credits			●
Checklist: Working for families tax credit eligibility			●
Guide: Working for families tax credit			●
Procedure: Working for families tax credits calculation			●
Checklist: Working for families calculation			●
Calculator: Working for families kit		●	●
Procedure: Workpapers and calculators			●
Workpapers and calculators as listed above, as well as:			●
Calculator: Loss limitation kit		●	●
Calculator: Ring-Fencing Rental Losses		●	●
Worksheet: RWT on interest input		●	●
Calculator: Simple tax		●	●
Worksheet: COVID-19 Wage Subsidy Calculation		●	●

FAQ procedures

Item	Bronze	Silver	Gold
Letter: FAQ report – cover letter			●
Procedure: ACC and claims			●
Script: ACC and making a claim			●
Fact sheet: ACC and making a claim	●	●	●
Procedure: ACC levies and how they work			●
Script: ACC levies and how they work			●
Fact sheet: ACC and Employer Levies	●	●	●
Fact sheet: ACC and Shareholder Employees	●	●	●
Fact sheet: ACC Better safety lower costs	●	●	●
Fact sheet: ACC CoverPlus Extra	●	●	●
Fact sheet: ACC Levies and how they work	●	●	●
Fact sheet: ACC Levies if you are Self-Employed	●	●	●
Procedure: Audit			●
Script: Audit			●
Fact sheet: Audit	●	●	●
Procedure: Bad debts and tax deductions			●
Fact Sheet: Bad debts and tax	●	●	●
Procedure: Balance dates – changing			●
Script: Change of balance date			●
Fact sheet: Change of balance date			
Procedure: Balance dates – options			●
Script: Balance dates			●
Fact sheet: Balance dates	●	●	●
Procedure: Balance dates for kiwifruit orchardists			●
Script: Balance dates for kiwifruit orchardists			●
Fact sheet: Balance dates for kiwifruit orchardists	●	●	●
Procedure: Business interest and RWT			●
Script: Business interest and RWT			●
Fact sheet: Business interest and RWT	●	●	●
Procedure: Business structures – changing			●
Script: Change of business structure			●
Fact sheet: Change of business structure farmer	●	●	●
Fact sheet: Change of business structure trader	●	●	●
Procedure: Business structures — options			●
Script: Business structures			●
Fact sheet: Business structures	●	●	●
Procedure: Client gift expenses			●
Script: Client gift expenses			●
Fact sheet: Client gift expenses	●	●	●
Procedure: Commission based insurance agents and GST			●
Script: GST and commission based insurance agents			●
Fact sheet: GST and commission based insurance agents	●	●	●
Procedure: Contractors schedular payments and withholding tax			●
Script: Contractors and schedular payments			●
Fact sheet: Contractors and schedular payments	●	●	●
Procedure: Disputes – IRD issued default assessment			●
Client letter: Disputes Cover Letter			●
Script: Disputes – IRD issued assessment			●
Script: Disputes – IRD issued assessment outside time limit			●
Fact sheet: Disputes – IRD issued assessment	●	●	●
Fact sheet: Disputes – IRD issued assessment outside time limit	●	●	●
Procedure: Disputes – IRD issued NOPA			●
Script: Disputes – IRD issued NOPA			●
Script: Disputes – IRD issued NOPA outside time limit			●
Fact sheet: Disputes – IRD NOPA			●
Fact sheet: Disputes – IRD NOPA sent to agent	●	●	●
Fact sheet: Disputes – IRD NOPA outside time limit	●	●	●
Procedure: Disputes – taxpayer mistake			●
Script: Disputes – mistake in tax return			●

Tax and Accounting continued

Script: Disputes – mistake in tax return outside time limit
Fact sheet: Disputes — amend a mistake outside time limit
Fact sheet: Disputes — I need to amend a mistake

Procedure: Employee accommodation expenses

Script: Employee accommodation and tax treatment
Fact sheet: Employee accommodation and tax treatment

Procedure: Employee versus independent contractor

Script: Employee versus independent contractor
Fact sheet: Employee versus independent contractor

Procedure: Employment Relations Act and Holidays Act 2003

Script: Employment Relations and Holidays Act
Fact sheet: Employment Relations and Holidays Act
Checklist: Employment Relations and Holidays Act

Procedure: Entertainment Expenses

Script: Entertainment expenses
Fact sheet: Entertainment expenses
Fact sheet: Entertainment expenses table

Procedure: FBT and company vehicles

Script: FBT on company vehicles
Fact sheet: FBT on company vehicles
Fact Sheet: Motor vehicle deductions
Client letter: Motor vehicle use

Procedure: Fines

Script: Fines and their deductibility
Fact sheet: Fines and deductibility

Procedure: Foreign investment fund

Script: Foreign investment fund
Fact sheet: Foreign investment fund
Fact sheet: Foreign Investment Fund short version

Procedure: Foreign superannuation tax rules

Script: Foreign superannuation tax rules
Fact sheet: Foreign superannuation tax rules

Procedure: GST and overseas suppliers

Script: GST and overseas suppliers
Fact sheet: GST and overseas suppliers
Client letter: Remote supplier advice re GST

Procedure: GST ratio option

Script: GST ratio option
Fact sheet: GST ratio method

Procedure: Home office expenses

Script: Home used as office expenses
Fact sheet: Home used as office expenses
Fact sheet: Working from home

Procedure: Livestock valuation methods

Script: Livestock valuation methods
Letter: Livestock valuation methods
Worksheet: Livestock Valuation Herd Scheme Values
Fact sheet: Livestock – Explaining the Herd and NSC Livestock Valuation Methods

Procedure: KiwiSaver

Script: KiwiSaver
Fact sheet: KiwiSaver
Letter: Employment continuing KiwiSaver
Letter: Employment opt-out of KiwiSaver
Letter: KiwiSaver existing employee joining
Letter: KiwiSaver changing contribution rate
Letter: Career development review salary
Form: Formal acknowledgement
Form: Document of variation to Employment Agreement

Procedure: Livestock valuation methods

Script: Livestock valuation methods
Letter: Livestock valuation methods
Fact sheet: Livestock – Explaining the Herdand NSC Live-stock Valuation Methods
Worksheet: Livestock valuation herd scheme values

Procedure: Loss carry-back

Script: Loss carry-back
Fact sheet: Loss carry-back scheme

Procedure: Minimum wage rates

Script: Minimum wage rates
Fact sheet: Minimum wage entitlement
Fact sheet: Minimum wage rates

Procedure: Mixed use assets

Script: Mixed use assets
Fact sheet: Mixed use assets
Form: Keeping track of mixed usage

Procedure: Parental leave

Script: Parental leave
Fact sheet: Parental leave – employers
Fact sheet: Parental leave – if you are self-employed

Procedure: Partnerships and allocating profits

Script: Partnerships – allocation of profits
Fact sheet: Partnerships – allocation of profits

Procedure: Payday Filing

Fact sheet: Payday Filing

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Business Fitness Tools Content Guide

Packages
- ● **Bronze** Advising Clients
- ● **Silver** (+ Bronze) Smart tools
- ● **Gold** (+ Bronze & Silver) Best Practice Procedures

Tax and Accounting continued

Procedure: PAYE intermediary subsidy ●
Fact sheet: PAYE intermediary subsidy ● ● ●

Procedure: Payments to spouses ●
Script: Payments to spouse ●
Fact sheet: Payments to spouse ● ● ●
Letter: Payments to spouses – letter to IRD ●

Procedure: Personal Property Security Act 1999 ●
Script: Personal property security Act 1999 ●
Fact sheet: Personal Property Security Act 1999 ● ● ●

Procedure: PPSR discharge ●
Script: PPSR discharge ●
Fact sheet: PPSR discharge ● ● ●
Fact sheet: Securities Interest Report via PPSR ● ● ●
Letter: PPSR – formal request for discharge ●

Procedure: Property and tax ●
Script: Property and tax ●
Fact sheet: Property and Tax – the bright-line test and more ● ● ●
Fact sheet: Tax and property – ring-fencing rental losses ● ● ●
Fact sheet: Property and Tax update ●
Fact sheet: Interest limitation on residential investment property ● ● ●

Procedure: Provisional tax ●
Script: Provisional tax ●
Fact sheet: Provisional Tax – avoiding the pitfalls ● ● ●
Fact sheet: Provisional Tax – calculation options ● ● ●
Fact sheet: Provisional Tax – the basics ● ● ●
Fact sheet: Provisional Tax – when do I have to pay ● ● ●
Fact sheet: Understanding the Provisional Tax System ● ● ●

Procedure: Public holidays and closedown periods ●
Script: Public holidays ●

Procedure: QCs and LTCs ●
Script: QC and LTC – explaining the features ●
Fact sheet: QCs and LTCs – Explaining the features ● ● ●
Guide: QCs and LTCs – comparison with companies ●

Procedure: Reimbursing allowances ●
Script: Reimbursing allowances paid to employees ●
Fact sheet: Reimbursing allowances paid to employees ● ● ●
Form: Agreement – Reimbursement for telecommunication tools ●

Procedure: Rental accommodation ●
Fact sheet: Renting Short-stay accommodation in the home ● ● ●
Fact sheet: Renting Short-stay accommodation at the bach ● ● ●
Fact sheet: Renting Short-stay accommodation and GST ● ● ●
Fact sheet: Renting Short-stay accommodation owned by a trust ● ● ●
Fact sheet: Renting to tenants ● ● ●
Fact sheet: Renting to flatmates ● ● ●
Fact sheet: Renting to boarders in the home ● ● ●
Calculator: Private Boarding Services Standard-Costs

Procedure: Rental properties – structures and expenses ●
Script: Rental properties ownership expenses ●
Fact sheet: Rental properties ownership expenses ● ● ●
Fact sheet: Rental deductibility table ● ● ●

Procedure: Reporting requirements for charities ●
Script: Reporting requirements for charities ●
Fact sheet: Reporting requirements for charities ● ● ●

Procedure: Research and Development ●
Script: Research and Development ●
Fact sheet: Research and Development ● ● ●
Fact sheet: Research and Development Tax Incentive ● ● ●
Fact sheet: RDTI - Excluded Activities ● ● ●
Fact sheet: Research and Development Loss Tax Credit ● ● ●

Procedure: Shareholder remuneration ●
Script: Shareholder remuneration ●
Fact sheet: Shareholder remuneration ● ● ●

Procedure: Simplifying tax ●
Script: Simplifying tax ●
Fact sheet: Simplifying tax ● ● ●

Procedure: Sponsorship expenses ●
Script: Sponsorship ●
Fact sheet: Sponsorship ● ● ●

Procedure: Stocktake ●
Script: Stocktake ●
Fact sheet: Stocktake ● ● ●
Worksheet: Stock sheet ●
Checklist: Stocktake ●
Script: Stocktake reminder ●

Procedure: Student allowances and loans ●
Script: Student allowances and loans ●
Fact sheet: Student allowances and loans ● ● ●
Fact sheet: Student allowances and loans other assistance and fees ● ● ●
Fact sheet: Student allowances eligibility ● ● ●
Fact sheet: Student loans eligibility ● ● ●
Fact sheet: Student loan repayments ● ● ●

Procedure: Tax debt – accountant ID ●
Script: Tax debt – accountant ID ●
Client letter: Tax debt cover letter ●
Fact sheet: Tax debt – accountant IDs issue LPP charged ● ● ●
Fact sheet: Tax debt – accountant IDs issue no penalties ● ● ●

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Business Fitness Tools Content Guide

Packages
- **Bronze** Advising Clients
- **Silver** (+ Bronze) Smart tools
- **Gold** (+ Bronze & Silver) Best Practice Procedures

Tax and Accounting continued

Procedure: Tax debt – IRD audit or dispute ●
Script: Tax debt– IRD audit or dispute ●
Fact sheet: Tax debt – audit or dispute LPP charged ● ● ●
Fact sheet: Tax debt – audit or dispute no penalties ● ● ●

Procedure: Tax debt – IRD legal ●
Script: Tax debt – IRD legal ●
Fact sheet: Tax debt – IRD legal ● ● ●

Procedure: Tax debt – IRD notice ●
Script: Tax debt – IRD issued notice ●
Fact sheet: Tax debt – late payment no penalties ●
Fact sheet: Tax debt – LPP charged ● ● ●

Procedure: Tax Relief ●
Fact sheet: COVID-19 Business Support ● ● ●
Fact sheet: Small Business Cashflow Loan Scheme ● ● ●
Fact sheet: COVID-19 Business Support update ● ● ●

Procedure: Terms of Trade ●
Script: Terms of trade ●
Fact sheet: Terms of trade ● ● ●
Sample text: Terms of trade example 1 ●
Sample text: Terms of trade example 2 ●
Sample text: Terms of trade example 3 ●
Form: Credit control application ●

Procedure: Travel allowances ●
Script: Travel allowances ●
Fact sheet: Travel allowances ● ● ●

Procedure: Travel expenses ●
Script: Travel expenses, domestic and international ●
Fact sheet: Travel expenses, domestic and international ● ● ●

Procedure: Trust Administration — legal costs and disclosures ●
Script: Trust administration and legal costs ●
Script: Trusts and information disclosures ●
Fact sheet: Trust administration and legal costs ● ● ●
Fact sheet: Trusts and information disclosures ● ● ●
Fact sheet: Trusts – disclosure requirements for foreign trusts

Procedure: Use of money interest ●
Script: Use of money interest ●
Fact sheet: Use of money interest ● ● ●

Procedure: Vehicles – lease or buy ●
Script: Vehicles – lease or buy ●
Fact sheet: Vehicles – lease or buy ● ● ●
Worksheet: Vehicle – buy vs lease vs HP asset analysis

Procedure: Wage subsidies ●
Script: Wage Subsidy COVID-19 ●
Fact sheet: Wage Subsidy COVID-19 ● ● ●
Fact sheet: Wage Subsidy Extension COVID-19 ● ● ●
Script: Wage subsidies ●
Fact sheet: Wage subsidies ● ● ●

Procedure: Working for families ●
Script: Working for families ●
Fact sheet: Working for families ●

Trusts

Best Practice Procedures

Procedure: Trust Administration Service ●
Letter: Trusts Act 2019 ●
Letter: Trust Beneficiary Disclosure short ●
Letter: Trust Beneficiary Disclosure long ●
Guide: Trust Minutes and Resolutions Overview ●
Guide: Trust Letters Overview ●

Procedure: Trust Administration Engage Clients ●
Fact Sheet: Trusts ● ● ●
Guide: Trust Administration ●
Guide: Trust Administration Service Engagement Meeting ●
Checklist: Trustee Obligations ●
Checklist: Appointment as Trustee Risk Management ●
Letter: Trustee Engagement ●
Client Letter: Trust Administration Engagement ●
Client Letter: Trust Administration Engagement with Risk Review ●

Procedure: Trust Administration Initial Tasks ●
Form: Trust Information Required ●
Guide: Trust Legal Documentation ●
Form: Memorandum of Wishes ●
Form: Trust Beneficiary Schedule ●
Guide: Partner or Director as Independent Trustee ●
Client Letter: New Trust with Enclosures ●
Checklist: New Trust Client ●
Form: Summary of Key Provisions ●
Form: Family Tree for a trust ●

Procedure: Trust Administration – Files and Register ●
Form: Trust Administration File Index ●
Form: Trust Administration File Tabs ●
Form: Trust Register ● ●

Trusts continued

Item	Bronze	Silver	Gold
Procedure: Trust Administration — Gifting			●
Fact sheet: Gifting	●	●	●
Client Letter: Gifting Review Script: Gifting			●
Guide: Gifting Decision Tree			●
Guide: Gifting Documentation			●
Checklist: Gifting Documentation			●
Form: Trust Administration Declaration of solvency			●
Form: Trust Administration Certificate of solvency			●
Letter: Solicitor Gifting Reminder			●
Client Letter: Gifting Cover			●
Procedure: Trust Administration — Annual Gifting			●
Letter: Solicitor Trust Documentation			●
Procedure: Trust Administration Ongoing Tasks			●
Checklist: Trusts AGM Checklist and Record			●
Letter: Trustee Resignation			●
Form: Trustee Retirement and Appointment Minute			●
Form: Trustee Retirement and Appointment Deed			●
Guide: Trustee Retirement, Removal and Appointment Preparation			●
Letter: Trustee Retirement Appointment Letter to Solicitor			●
Letter: Trustee Retirement Letter to IRD			●
Procedure: Trust Administration Risk Review			●
Client Letter: Trust Risk Review Engagement			●
Letter: Trust Risk Review Advice to Solicitors			●
Guide: Mirror or Dual Trusts Filing			●
Form: Trust Administration Risk Summary			●
Guide: Trust Review			●
Guide: Electronic Trust Register Information to Include			●
Letter: Trust Risk Review Results Advice to Solicitors			●
Sample text: Trust Risk Review Results – Sample Letter to Solicitors			●
Client Letter: Trust Risk Review Results Advice to Client			●
Sample text: Trust Risk Review Results –Sample Letter to Client			●

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