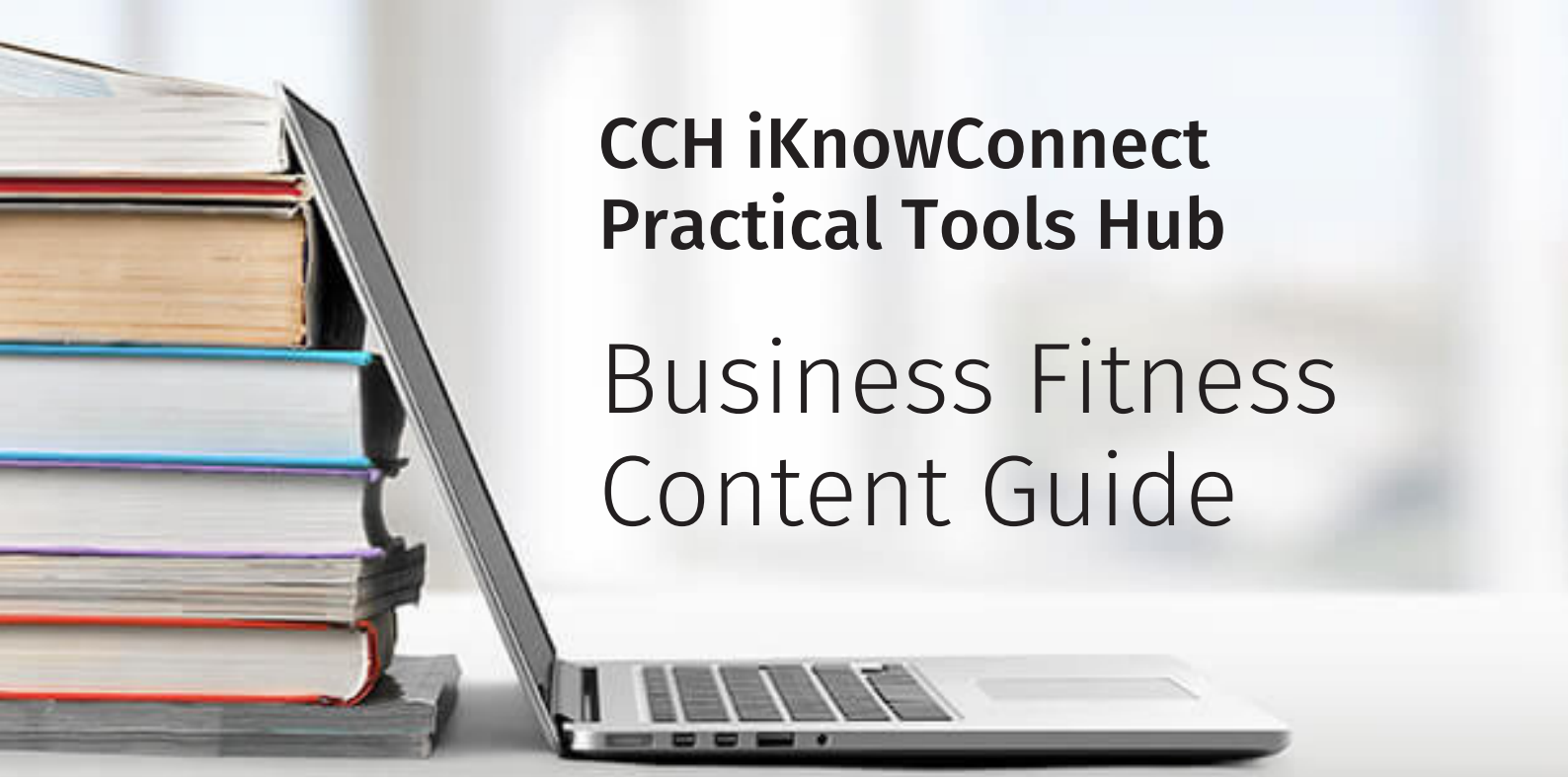


CCH iKnowConnect Practical Tools Hub

Business Fitness Content Guide

Helping Accountants Work Smarter

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

Our content solution can help you achieve what is really important to you – the things that will improve your firm's performance and your bottom line. It's a way to ensure consistency across the team and help them produce accurate results. It makes it easier to delegate tasks and easier to train staff and bring new team members up to speed quickly.

We have a dedicated content team constantly reviewing and updating the suite to keep it fresh and accurate. Included in our content suite are electronic workpapers, specialised calculators, targeted service kits, and newsletter services for you to brand as your own and publish to your clients.

Business Fitness NZ Content and Workpapers are available through CCH iKnowConnect Practical Tools Hub and CCH iFirm.



Wolters Kluwer

Helping accountants work smarter

It's about systems

The CCH iKnowConnect Practical Tools Hub is a full systems manual for accounting firms. The content includes tools and resources to help simplify and streamline your business. These include:

- Workpapers and calculators
- Checklists
- Letter/email templates
- Procedures
- Forms
- White label client newsletters.

It's about you

What are your priorities?

Compliance work

- Streamline your annual accounts workflow, with client questionnaires/checklists to gather information, workpapers which are integrated with your GL to prepare annual accounts, and tax calculators to pull the figures together.
- Prepare for the annual client meeting with financial reporting letters, KPI reports from the workpapers, and branded giveaways like the tax payment wallplanner.

Growing your business

- Recruiting new team members is expensive and time consuming. Help your employees fast track their onboarding, training and development with step-by-step procedures, checklists, scripts and templates for effectively communicating with clients.
- Empower your team to grow your brand with access to trusted and reliable information.

Quality control

- Ensure your accounting practice is resilient with access to client engagement letter templates, policies, and systems for quality management.

Extending service offerings

- Engage clients with compliance and business advisory newsletters. Promote your business development services with coaching guides and calculators.



How the CCH iKnowConnect Practical Tools Hub can help

Focus on the tasks that add the most value to your business

Annual accounts and CCH Workpapers

- Prepare annual accounts for clients with state-of-the-art workpapers, assuring consistency and quality throughout the firm with practical advice to ensure tax compliance.

Business development services

- Provide coaching and value add services to clients to grow their business and improve profitability.

Client advice

- Empower your team to respond speedily to client queries and create opportunities to market additional services.

Client management

- Enable your team to deliver the best possible experience to clients, from onboarding to offboarding.

Compliance services

- Calculators, procedures, templates, and guides for best practice delivery to clients of accounting and tax, company, and trust administration services.

Newsletters

- White label client newsletter templates on tax compliance and business advisory topics to nurture clients and make them aware of additional services.

Practice management

- Make it easier to induct and train your team, manage day-to-day tasks, and achieve strategic goals for your accounting firm.

The tools your firm needs in one easy to use location



What our customers say...

'We have always found the content and the support provided by CCH Business Fitness to be of the highest standard and would thoroughly recommend them to any accounting firm'.

'I love the fact that they link with MYOB Accountants Office and with the click of a button my GL is loaded into the workpapers. If I make a change in the GL, I just click the refresh button and all of my workpapers are instantly updated - brilliant!'.

'It was a business case. There's money in systemisation. We wanted to make more money'.

CCH iKnowConnect Practical Tools Hub

Topic-by-topic overview



Workpapers for Annual Financials

- Integrated with GL (CCH iFirm, MYOB AO & AE, APS & Reckon One, Xero)
- Static workpapers (non-integrated)
- Livestock workpapers (integrated and non-integrated)
- Dividend workpapers, includes ICA rec and dividend minutes
- Annual Accounts Guide on red flags to look for when preparing clients' annual accounts. Practical advice to ensure tax compliance on accounts receivable, fixed assets, entertainment expenses, FBT, repairs and maintenance.



Business development services

- **Coaching, library services for:**

  - Accounting systems
  - Business systems
  - Customer management
  - Debtor management
  - Directorship
  - Exporting
  - Family businesses
  - Financial management
  - Human resources
  - Marketing and selling
  - Pricing and margins
  - Retirement planning
  - Risk management
  - Selling the business
  - Succession planning
  - Technology in business
  - Time management

- **Value-add services including:**

  - Appraisals
  - Business management cycle
  - Business needs assessment
  - Business plan preparation
  - Confidentiality agreements
  - Customer advisory board facilitation
  - Directors' meetings - facilitation
  - Family advisory board facilitation
  - Financing
  - KPI monitoring
  - Management control plans
  - Planning days and planning sessions
  - Property management services agreement
  - Sale reports
  - Succession planning
  - Valuations
  - Virtual Chief Financial Officer (CFO)

- Resources to assist clients starting and buying a business
- Profit improvement tools to help clients envision and implement strategies to increase profitability

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Newsletters

- **White label client newsletters (ACCELERATE) are published bimonthly, with special alert editions as needed.**

  - With tax and business news to grow your brand as a trusted advisor.
  - Brand it as your own newsletter to engage with clients and prospects through email, your blog, and social media.

CCH iKnowConnect Practical Tools Hub

Topic-by-topic overview

Client advice

- **Advise clients on:**

  - Business Advisory
  - Company requirements
  - Employment
  - Farming businesses
  - Financial reporting
  - Property
  - Tax
  - Trust requirements

Client management

- **Empower the team to engage and respond to clients to a consistent professional standard.**

  - Complaints
  - Engagements
  - Offboarding
  - Onboarding

Compliance services

- **Core content for service provision on:**

  - Accounting services
  - Company and Trust administration
  - Tax

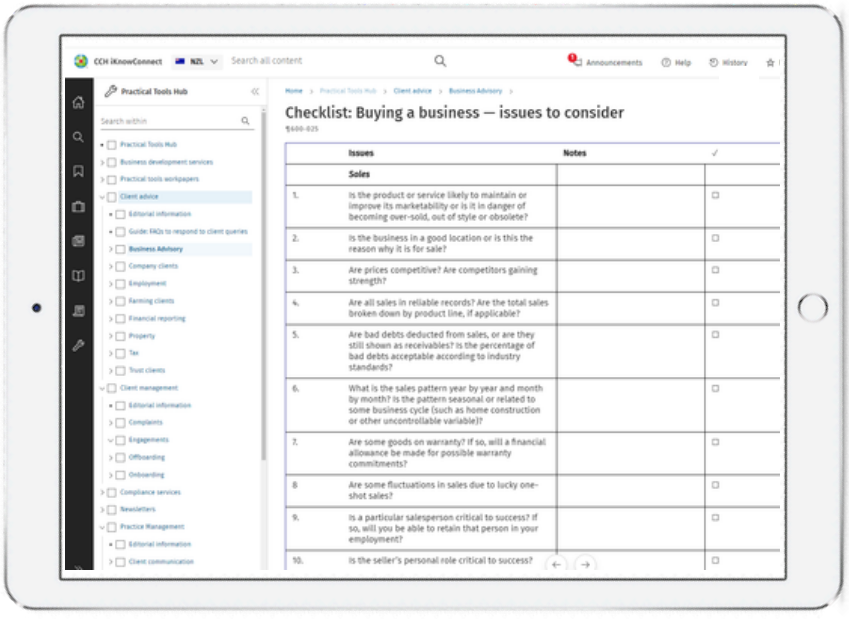
Practice management

- **Grow your firm with clear guidelines on both day-to-day and strategic tasks within the firm:**

  - Client communication
  - File maintenance
  - Firm policies
  - Office management
  - Resources for the accounting team
  - Strategy
  - Team and HR

Category: Client Advice

Checklist: Buying a business - Issues to consider



FLEXIBLE PACKAGES TO SUIT YOUR FIRM

No two accounting firms are the same, so if you are a specialist accounting firm, a sole practitioner or dealing with a broad range of tax compliance and business advisory tasks, it's easy to build a subscription package that suits your business focus and budget.

Flexible pricing packages and modules mean you will only pay for the level of content you need.

Contact us today to learn how you can access a 12-month subscription through CCH iKnowConnect, Wolters Kluwer's next-generation online research platform with powerful search capabilities to speed up your research.

CONTACT US

T. 0800 500 224

E. nz-bfsupport@wolterskluwer.com

Explore all our practice areas in CCH iKnowConnect to find solutions that best fit your business or practice's requirements.

- Business Law
- Company and Financial Markets Law
- Employment and HR Law
- Property Law
- Workplace Health & Safety
- Trust Precedents
- Trusts
- New Zealand Master Tax Guide
- Income Tax
- GST
- Duties
- Superannuation
- Practical Tools Hub
- Questions and Answers on Tax
- Practitioner articles
- Tax Solutions
- APAC HR and Employment
- Asia Tax
- BEPS
- Worldwide Tax

Visit our website: wolterskluwer.com/en-nz/solutions/cch-iknowconnect

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Wolters Kluwer fuels global commerce by enabling tax and accounting professionals and businesses of all sizes to drive productivity, navigate change, and deliver better outcomes. We provide information, software, and services that deliver vital insights, intelligent tools, and the guidance of tax experts. With workflows optimised by technology and guided by deep domain expertise, we help organisations grow, manage, and protect their businesses and their client's businesses.