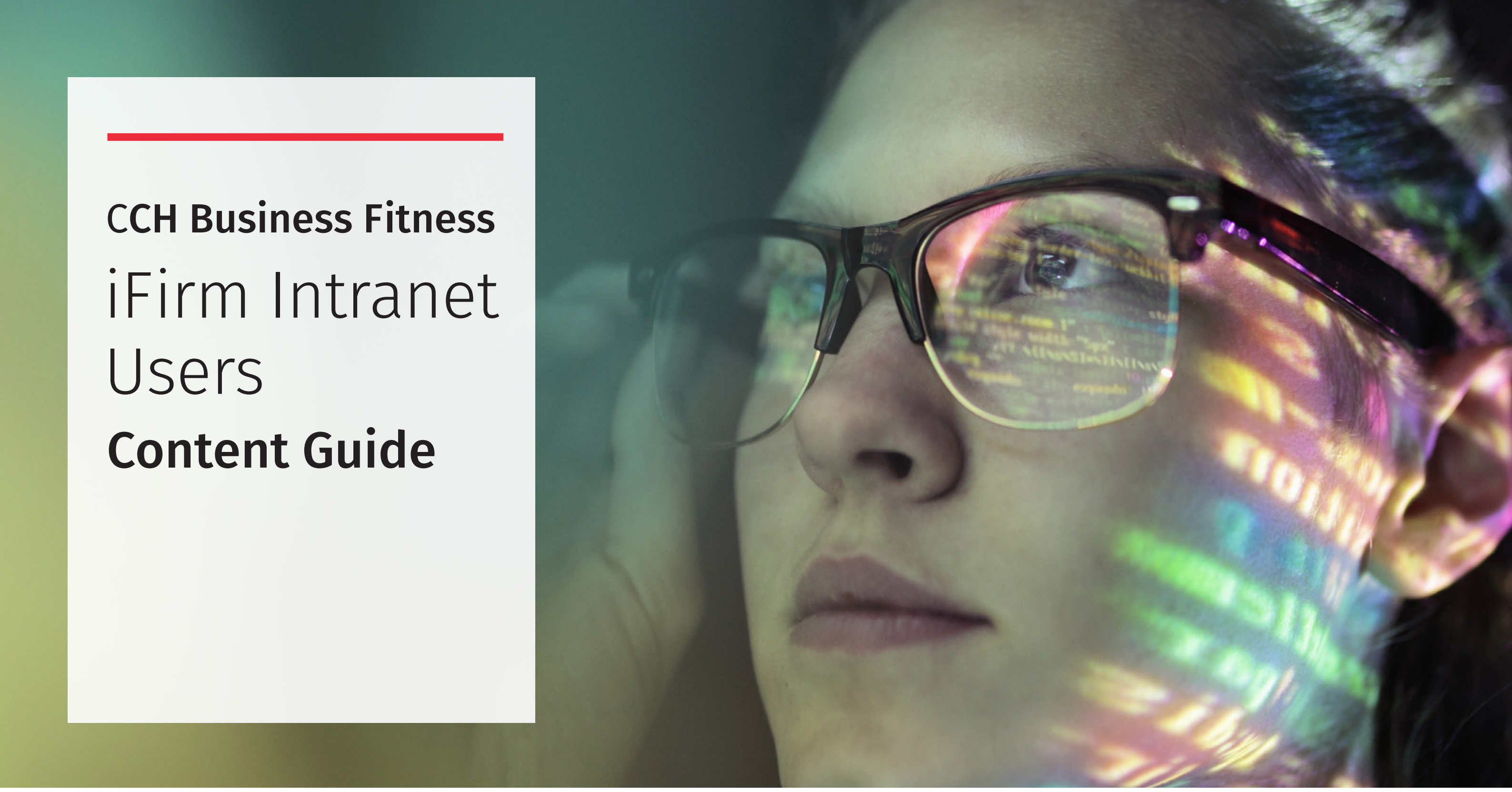

CCH Business Fitness

iFirm Intranet Users

Content Guide

Content Hub

In CCH iFirm Intranet, the Content Hub lets you find CCH Business Fitness NZ content easily. Divided into 5 key areas, the Content Hub is a central access point for browsing content.

- Client services
- Client queries (a library of frequently asked questions)
- Workpapers & calculators
- The coaching library (business mentoring resources)
- The firm (practice management)

It’s about systems

The CCH Business Fitness NZ content suite is a full systems manual for accounting firms. The content includes tools and resources to help simplify and streamline your business.

- Calculators
- Checklists
- Fact sheets
- Flowcharts
- Forms
- Guides
- Letters
- Policies
- Procedures
- Scripts
- Workpapers

Tools and resources are linked to detailed procedures to ensure tasks are performed consistently across the firm. And don’t forget, with iFirm Intranet, you have the flexibility to customise the content to fit perfectly with your firm.

Wolters Kluwer

Client services

This section incorporates all the services where you interact with your clients, from the initial New Client process, through Compliance and Value Add to winding up a client relationship.

Starting

This includes the resources needed when beginning new client relationships.

- New client setup process from admin to GL
- Engagement letters
- Buying or setting up a business (including due diligence)
- Appraisals
- Business structures
- IRD registrations
- IRD online services
- New entities

Compliance

Your day-to-day accounting processes.

- Annual accounts incl checklist builder and client questionnaires
- Client annual service plan
- Financial reporting
- Dividend preparation
- Shareholder remuneration review
- Statement of income
- Transitional rules — depreciation
- Working for families

Tax Suite

Current and comprehensive, the tax suite provides procedures and tools to meet your client's tax needs.

- Income tax
- FBT
- GST
- Income equalisation
- Mixed use assets
- PAYE
- Property
- Provisional tax
- Resolving tax debt
- Resolving tax disputes
- RWT
- Tax refunds
- Tax residence
- Tax specialist engagements
- Tax risk review
- UOMI

Value Add

As a trusted advisor, you have an opportunity to expand your services beyond accounting and taxes. Use these resources to deliver high quality value add services to clients.

- Company administration, from company formation, through annual and ongoing admin to wind-up of solvent companies
- Trust administration
- ACC administration & advisory
- Virtual CFO
- Client bank accounts
- Client accounts payment
- Employer documentation kit
- Seminars
- Statement of financial performance

Business Development

Use these resources to help grow your client's businesses.

- Business advisory needs flowchart
- Business needs assessment
- Business plan preparation
- Coaching programme
- Director's meetings facilitation
- Family advisory board facilitation
- Financing
- Planning days / sessions
- Confidentiality & property management agreements
- Sales & purchases (business/farm)

Profit Improvement

- Customer advisory board
- KPI monitoring
- Management control plans
- Profit & cashflow
- Profit improvement

Ending

- Business sale reports
- Client deletion procedure
- Dealing with death
- Succession planning
- Valuations

Client queries

Handy resources to help you deal with common client queries. FAQs include links to scripts, fact sheets and more.

Topics include:

- ACC & claims
- ACC levies & how they work
- Accounting terms & financial statements
- Allowances
- Audit
- Bad debts & tax
- Balance dates
- Benchmarking
- Business interest & RWT
- Business management cycle
- Business structures
- Charities - Reporting Requirements
- Client gift expenses
- Contractors, schedular payments & withholding tax
- Cost control
- Depreciation
- Employee accommodation
- Employee or contractor
- Employment
- Employment Relations Act & Holidays Act
- Entertainment expenses
- Equity partnerships
- Family businesses
- Farmhouse expenses
- FBT & vehicles
- FIF
- Fines
- Foreign superannuation
- Governance & family advisory boards
- GST & commission-based insurance agents
- GST & overseas suppliers

- GST ratio option
- Health & safety
- Home office expenses
- Income equalisation scheme
- IRD – tax disputes
- KiwiSaver
- Livestock valuation
- Loss Carry Back
- Minimum wage
- Mixed use assets
- Parental leave
- Partnerships & allocating profits
- Payday filing
- PAYE intermediary subsidy
- Payments to spouses
- PPSA/PPSR
- PPSR discharge
- Property & tax
- Provisional tax
- Public holidays & closedown periods
- QCs & LTCs
- Rental property
- Research & development
- Risk management
- Shareholder remuneration
- Simplifying tax
- Sponsorship
- Stocktake
- Student allowances & loans
- Succession planning
- Tax
- Tax debt
- Tax relief
- Terms of trade
- Travel allowances
- Travel expenses
- Trust Administration - legal costs and disclosures
- Use of money interest
- Vehicles — lease or buy
- Wage subsidies
- Working for Families

Workpapers & Calculators

We've combined the power of Excel with our in-built smarts to deliver a comprehensive set of workbooks.

Workpapers for Annual Financials

- Integrated with GL (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
- COVID-19 wage subsidy

Calculators

- FBT
- FIF
- Farmhouse expenses
- Fixed price agreement
- GST apportionment
- Income equalisation
- Interest
- Loss limitation
- Mixed use assets
- Mortgage interest
- NZ tax residence
- Private boarding services standard-costs
- Provisional tax
- Ring-fencing rental losses
- Rural business budget & cashflow
- RWT on interest input form
- Simple tax calculator
- Tax payment wallplanner
- Use of money interest
- Working for families kit

Business Advisory Calculators

- Working capital
- Breakeven point
- Charge rates
- Debtor days
- Increasing prices
- Discounting
- Profit & cashflow
- Profit improvement potential
- Ratio analysis
- Simple budget worksheet
- Statement of financial performance
- Valuation

Coaching Library

Business mentoring resources, including guides, checklists, forms and calculators for use with clients. Topics include:

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

The Firm (practice management)

How your business is run behind the scenes directly affects your productivity and customer service levels. Let our procedures help you streamline your administration.

Client Contact

- Appointments
- Client categorisation
- Client feedback
- Client screening
- Contact
- Changing contact details
- Marketing (Press kits & seminars/ webinars)
- New clients
- Newsletters
- Queries and complaints
- Records
- Deletions

Most popular

Day-to-day

These procedures ensure risk management by recording how tasks are done in your firm so they can be delegated or replicated.

- Banking
- Computer system
- Correspondence
- Couriers
- Mail handling
- Ordering goods and services
- Printing and binding reports
- Reception maintenance
- Stationery & office supplies
- Suggestions
- Telephone answering
- Timesheets
- Workflow

Cashflow

- Debtors
- Fee queries
- Payment of accounts
- Payroll & PAYE
- Petty cash
- Trust account administration

Annual

- Fixed asset control
- Insurance review
- Office security and maintenance

Team

- Employment process
- Grievances
- Health & safety
- KiwiSaver
- Leave entitlement
- Team meetings
- Training

Strategic

- AML/CFT
- ATE application
- Mentor application
- Practice review preparation
- Strategic planning day

Team Knowledge Base

A library of resources that your team can add to.

Rates & threshold table

A popular reference document for the team

Accelerate Client Newsletter

Published bimonthly, Accelerate contains important tax and business news that your clients will look forward to reading. Brand it as your own and publish to email, website, and social media. Accelerate has your newsletter and social media content sorted.

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