



CCH Business Fitness Content Suite

Smart tools to
improve your
accounting practice
and profitability

CCH Business Fitness Content Suite for Accounting Firms

The CCH Business Fitness content suite helps make accountants' lives easier by streamlining your accounting business so you can focus on the tasks that add the most value to your business.

Features of the suite

- Technically correct and always current
- Streamlined efficient processes
- Cloud based
- Word and Excel based templates
- Electronic workpapers
- Customisable
- Integration with accounting software

Immediate benefits

- Establish best practice across your team
- Allow more time to focus on your business and your clients
- Enable delegation
- Save reviewers' time
- Up-skill your staff
- Consistent task handling and output
- Facilitate training
- Accessible anywhere to your team
- Reduce risk of error
- Improve profitability
- Make your life easier

Topics

- Electronic annual workpapers
- Income tax, GST/FBT procedures
- Tax disputes toolkit
- Tax debt management processes
- Working for Families income calculation tool
- Rates and Thresholds quick reference guide
- Annual questionnaire builder
- Quality control manual
- Practice review preparation documentation
- Clever tax calculators including FBT and Provisional tax calculators
- Client newsletters
- Client engagement tools
- Business development processes
- Business advisory resource library
- HR documentation for clients
- Company administration suite
- Trust administration suite
- ACC administration suite
- Debtor management suite
- New client management
- Internal risk management
- Internal HR suite
- And more...

Five Key Areas

Core content:



The Client

A wealth of tools and procedures to help you manage your client's life cycle, from when a client first joins your practice or starts their business venture to on-going services, whether it be compliance, value add, business development, profit improvement, through to business cessation.

Designed to provide you with step by step instructions and the templates you need, the kit allows you to delegate tasks to appropriate team members, freeing you up to spend quality time with clients or work on growing your business.

Utilise the best practice procedures, tools and templates to delegate tasks to your team members for your review.

Workpapers and Calculators



Interactive resources to calculate, prepare and determine the financial statements, tax returns and financial position of your clients.

These invaluable Electronic Workpapers import client data from your client accounting software for you and your team to review the information, make adjustments and prepare your client's financial statements.

A number of interactive calculators are also available to help you determine your client's tax liability. Also included are workbooks to help your clients improve the profitability of their business.



Coaching

Resources for Partners working with clients to improve their businesses.

The coaching library provides plain English business advisory resources including kits, guides, checklists and forms for you to use with your clients to improve their profitability. Don't reinvent the wheel, simply brand the content provided and send to your client, or customise it according to your client's particular situation.



Queries

Resources to help your team answer common client queries. Each links to scripts, fact sheets and further resources.

Provide extra value to your clients when they come to you with their commonly asked questions. With our FAQ resources of procedures, scripts, reports and cover letters, your team members can answer commonly asked questions on the spot without having to write off lost research time or rely solely on senior team members. Follow up client conversations with a branded report outlining the relevant points to be aware of, facilitating your ability to charge for the service.

Links to scripts, fact sheets and other appropriate resources are provided.

The Firm



The nuts and bolts of how your practice is run behind the scenes directly affects your productivity and profitability.

Utilising CCH Business Fitness means you have confidence that you have procedures in place to reduce your risk exposure and have best practice for facilitating your firm's team training, HR and debtor processes ensuring your practice always runs smoothly. Resources to enable your firm's compliance with CAANZ's PS 1 and SES 2 requirements are provided.

The kit provides a wealth of tools and procedures to enable you and your team to provide your client with a seamless service.

DON'T TAKE OUR WORD FOR IT!

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!'

'We needed our team to work more independently, without interrupting us every five minutes. This was the resource that allowed them to do just that.'

'We were able to recoup the amount we invested in CCH Business Fitness almost immediately by implementing the ACC Administration and Advisory service.'

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

For more information visit Wolters Kluwer New Zealand | www.wolterskluwer.co.nz | 0800 500 224 or to subscribe, contact our Account Managers for your area:

Aaran Cavallo | Call 021 430 704 | Email: aaran.cavallo@wolterkluwer.com | Business Fitness - NZ BDM - Specialist

Grant Cartwright | Call 03 425 9328 | Email: gcartwright@wolterkluwer.com | National Major Accounts

Sunshine Metro | Call 09 488 2764 | Email: sunshine.metro@wolterkluwer.com | Auckland CBD

Trish Glover | Call 09 213 2314 | Email: trish.glover@wolterkluwer.com | Auckland West & South, Waikato, Taranaki, Taupo & Hawkes Bay

Ben Haarmann | Call 09 213 2311 | Email: ben.haarmann@wolterkluwer.com | Auckland North, East & South East, Northland, Tauranga, Gisborne

Sarah Innes | Call 04 979 8976 | Email: sarah.innes@wolterkluwer.com | South Island excl Nelson/Marlborough

Sarah Innes | Call 04 979 8976 | Email: sarah.innes@wolterkluwer.com | Wellington, Manawatu, Nelson/Marlborough



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When you have to be right

Content Guide



The Client

Starting up a new client relationship:

- Engagement letters
- Buying or setting up a business
- Appraisals
- Business Structures
- IRD Registrations
- IRD Online Services

Compliance:

- Client Annual Service Plan
- Financial Statements, including checklist builder and client questionnaires
- Dividend Preparation
- Shareholder Remuneration Review
- Statement of Income

Tax Suite:

- Income Tax
- GST
- Mixed Use Assets
- FBT
- Provisional Tax
- Tax Residence
- Sale and Purchase of Land
- Tax Refunds
- Checking UOMI
- Resolving Tax Debt
- TMNZ Tax Pooling, Finance and Purchase
- Engaging a Tax Specialist
- Tax - Risk Management Review
- Resolving Tax Disputes with IRD
- Working for Families

Rates & Thresholds table:

- Popular two page reference document

Value Add:

- Company Administration
- Trust Administration
- ACC Administration & Advisory
- Virtual CFO
- Employer Documentation Kit

Business Development:

- Business Advisory Needs Flowchart
- Business Needs Assessment
- Business Plan Preparation
- Directors' Meetings Facilitation
- Financing
- Planning Days
- Agreements: Confidentiality & Property Management Services

Profit Improvement:

- Customer Advisory Board
- KPI Monitoring
- Management Control Plans
- Profit & Cashflow
- Profit Improvement

Transitioning a client:

- Succession Planning
- Appraisals
- Valuations
- Business Sale Reports
- Client Deletion
- Dealing with Death



Workpapers & Calculators

Workpapers for Annual Financials:

- Integrated with GL (iFirm, MYOB AO & AE, APS, Xero)
- Static workpapers (not integrated with GL)
- Livestock workpapers
- Dividend workpapers, includes ICA reconciliation and dividend minutes

Calculators:

- FBT Calculator
- FIF
- Fixed Price Agreement
- GST Apportionment
- Loss Limitation
- IED Scheme Cost Benefit Calculator

- Interest Calculator
- Mortgage Interest Calculator
- Provisional Tax Calculator
- Tax - NZ Residence Calculator
- Use of Money Interest Calculator
- Working for Families Kit

Business Advisory Calculators:

- Working capital
- Breakeven point
- Debtors days
- Increasing prices
- Discounting
- Profit improvement potential



Coaching

- 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



Queries

- ACC and Claims
- ACC Levies and How They Work
- Audit
- Balance Dates – Changing
- Balance Dates – Options
- Balance Dates for Kiwifruit Orchardists
- Business Interest and RWT
- Business Structures – Options
- Business Structures – Changing
- Client Gift Expenses
- Employee Accommodation
- Employee Versus Independent Contractor
- Employment Relations Act and Holidays Act
- Entertainment Expenses
- FBT and Company Vehicles
- Fines
- FIF
- Foreign Superannuation
- GST and Commission based insurance agents
- GST Ratio Option
- Home Office Expenses
- IRD – Tax Disputes
- KiwiSaver
- Livestock Valuation Methods
- Minimum Wage
- Mixed Use Assets
- Parental Leave - Employers
- Parental Leave - Self-Employed
- Partnerships and Allocating Profits
- PAYE Intermediary Subsidy
- Payments to Spouses
- PPSA/PPSR
- PPSR Discharge
- Provisional Tax
- Public Holidays and Closedown Periods
- QCs and LTCs
- Reimbursing Allowances
- Rental Properties - Structures and Expenses
- Shareholder Remuneration
- Sponsorship
- Stocktake
- Student Allowances and Loans
- Tax Debt
- Terms of Trade
- Travel Allowances
- Travel Expenses
- Trust Administration and Legal Costs
- Use of Money Interest
- Vehicles – Lease or Buy
- Wage Subsidies



The Firm

Client contact:

- Marketing (Seminars)
- Appointments
- Client Categorisation
- Client Screening
- Contact
- New Clients
- Client Feedback
- Queries & Complaints
- Records Folders
- Returning Records
- Deletions

Day to Day:

- Banking
- Computer System
- Correspondence
- Couriers
- Mail Handling
- Ordering Goods & Services
- Reception Maintenance
- Stationery & Office Supplies
- Suggestions
- Telephone Answering
- Timesheets and Workflow

Cashflow:

- Debtors
- Fees
- Fee Queries
- Payment of Accounts
- Payroll & PAYE
- Petty Cash

- Trust Account Administration

Annual:

- Fixed Asset Control
- Insurance Review
- Office Security & Maintenance

Team:

- Employment Process
- Grievances
- Health & Safety
- KiwiSaver
- Leave Entitlement
- Team Meetings
- Training

Strategic:

- ATE Application
- Mentor Application
- Practice Review Preparation
- Strategic Planning Day

Policies:

- Templates for firm policies, including Quality Control Manual

Accelerate: the white label newsletter service

- A monthly Tax & Business newsletter that you can send to clients and brand as your own. Accelerate has both your newsletter & social media sorted!