

TRADES PACKAGES – BUILDING YOUR BUSINESS TOGETHER

We believe that it is our role to provide you with the best financial tools to build your business success. Our trades packages aim to do just that while providing you with certainty around the fees you pay.

Take a look at our plans and decide what works for you. Our packages can be custom built around your needs.

OUR MOST POPULAR PACKAGE!

TRUSTY TOOL BELT From \$195 +GST per month

You have most things under control but just need help with annual compliance essentials.

- Appropriate accounting software eg: Xero / MYOB / Banklink
- Annual financial statements and annual accounting meeting to review
- Income tax returns
- Tax payment reminders
- Liaison with IRD
- 5 minute phone & email queries
- Invites to industry related seminars
- Regular Onbalance newsletters
- Complimentary ToolBox Meeting to set annual goals and areas of focus

THE RIGHT TOOL FOR THE JOB From \$395 +GST per month

You like to keep a finger on the pulse with regular performance reporting and tax updates while still ensuring the compliance essentials are covered.

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- Complimentary ToolBox Meeting to set annual goals and areas of focus
- GST preparation
- Provisional tax update
- Quarterly management reports and review meetings

A SPANNER FOR THE WORKS From \$595 +GST per month

You are serious about building your business. You want to plan for the year ahead and track progress throughout. You feel your time is better spent working in your business.

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- Invites to industry related seminars
- Regular Onbalance newsletters
- Complimentary ToolBox Meeting to set annual goals and areas of focus
- GST preparation
- Provisional tax update
- Quarterly management reports and review meetings
- ToolBox update meeting to review ToolBox goals
- Setting and monitoring of annual budgets and cash flows
- Assisting with the setting of annual KPIs for your business

YOUR TOOL BOX Price on Application

We realise your business is unique, so tell us what you need and we will build a package with a fixed price. You will get exactly the tools that are required for your business.

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- Regular Onbalance newsletters
- Complimentary ToolBox Meeting to set annual goals and areas of focus
- Plus you add more 'Tools' from the list of services we offer below

CUSTOM MODS

- Payroll
- Budgeting
- ACC Review
- Periodic Management Reports
- FBT
- PAYE
- Cash Flow Reporting
- GST Preparation
- KPI Setting & Review

TRUSTY TOOLBELT

Package includes:

- One of the following accounting software package subscriptions:
 - Xero GST Cashbook
 - MYOB Cashbook
 - Banklink
 - Preparation of annual financial statements and taxation returns
 - Annual face to face accounting meeting to review your financial statements and tax returns
 - Filing of taxation returns with IRD
 - Checking of IRD assessments and issue of tax payment reminders
 - Phone and email support for five minute queries and advice
 - Invites to relevant educational seminars related to your industry/business
 - Complimentary one hour face to face meeting to discuss your business direction/goals and how we can best support you to achieve them
- You may also wish to consider adding one or more of our additional tools to your package:
- Payroll/PAYE
 - GST preparation
 - Budgeting – annual budgets and reviews
 - ACC Review
 - Tax Planning

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 - Complimentary one hour face to face meeting to discuss your business direction/goals and how we can best support you to achieve them
 - Preparation of GST returns for you based on relevant information supplied by you
 - One interim calculation for provisional tax at an instalment date that suits you best
 - Preparation of quarterly management reports and quarterly meetings to review results and discuss areas of focus
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 - One interim calculation for provisional tax at an instalment date that suits you best
 - Preparation of quarterly management reports and quarterly meetings to review results and discuss areas of focus
 - One hour meeting to review progress against your goals and to update direction and actions to meet these
 - One hour meeting to assist with annual budget/cash flow preparation and KPI setting
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**More than one entity?
No problem!**

Contact us to design a package that covers the individual needs of each of your entities for one monthly price.

OUR MOST POPULAR PACKAGE!