

## WE BELIEVE IT IS OUR ROLE TO PROVIDE YOU WITH THE BEST SERVICES TO DRIVE YOUR BUSINESS SUCCESS!

Our service packages aim to do just that while providing you with certainty around the fees you pay. Whether you just want to meet your annual compliance requirements or drive continuous growth within your business, our packages cover it all.

Take a look at our plans and decide what works for you...but don't feel limited, we can turbo charge your plan to drive you in the direction you want at a speed that's comfortable for you! Also consider our list of Custom Mods then contact us to create a package that best defines your road to success.



RESIDENTIAL RENTAL From \$95 +GST per month	CRUISE CONTROL From \$195 +GST per month	ACCELERATOR From \$495 +GST per month	BOOST From \$795 +GST per month
Basic compliance for residential rental property owners	Compliance essentials for smaller businesses	Focussed advice and regular reporting aimed at boosting financial performance while still covering compliance	Maximising growth and goals to actively build business alongside annual compliance requirements
<ul style="list-style-type: none"> <li>• Appropriate accounting software</li> <li>• Annual financial statements</li> <li>• Tax returns</li> <li>• Tax assessments/reminders</li> <li>• Liaison with IRD</li> <li>• 5 minute phone &amp; email queries</li> <li>• Complimentary educational seminars</li> </ul>	<ul style="list-style-type: none"> <li>• Appropriate accounting software</li> <li>• Annual financial statements</li> <li>• Tax returns</li> <li>• Tax assessments/reminders</li> <li>• Liaison with IRD</li> <li>• 5 minute phone &amp; email queries</li> <li>• Complimentary educational seminars</li> <li>• Annual accounting meeting</li> <li>• Complimentary client review meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Appropriate accounting software</li> <li>• Annual financial statements</li> <li>• Tax returns</li> <li>• Tax assessments/reminders</li> <li>• Liaison with IRD</li> <li>• 5 minute phone &amp; email queries</li> <li>• Complimentary educational seminars</li> <li>• Annual accounting meeting</li> <li>• Complimentary client review meeting</li> <li>• Provisional tax update</li> <li>• Periodic management reports</li> <li>• GST return preparation</li> </ul>	<ul style="list-style-type: none"> <li>• Appropriate accounting software</li> <li>• Annual financial statements</li> <li>• Tax returns</li> <li>• Tax assessments/reminders</li> <li>• Liaison with IRD</li> <li>• 5 minute phone &amp; email queries</li> <li>• Complimentary educational seminars</li> <li>• Annual accounting meeting</li> <li>• Complimentary client review meeting</li> <li>• Provisional tax update</li> <li>• Periodic management reports</li> <li>• GST return preparation</li> <li>• Momentum meeting</li> <li>• Assistance with annual budget setting</li> <li>• Assistance with annual KPI setting</li> </ul>

CUSTOM MODS	<ul style="list-style-type: none"> <li>• Payroll</li> <li>• PAYE</li> <li>• Professional Trusteeship</li> <li>• ACC Review</li> </ul>	<ul style="list-style-type: none"> <li>• Debtors/Creditors</li> <li>• GST Preparation</li> <li>• FBT</li> <li>• Dividend Documentation &amp; Payment</li> </ul>	<ul style="list-style-type: none"> <li>• Periodic Management Reports</li> <li>• Working for Families Review</li> <li>• Cash Flow Reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Company Administration</li> <li>• Budgeting</li> <li>• KPI Setting &amp; Review</li> </ul>
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## PACKAGE INCLUSIONS

OUR MOST  
POPULAR  
PACKAGE!

### RESIDENTIAL RENTAL

Package includes:

- Either one of the following accounting software package subscriptions:
  - Xero Non GST Cashbook
  - MYOB Cashbook
  - BankLink
  - CashManager
- Preparation of annual financial statements and taxation returns
- Filing of taxation returns with IRD
- Checking of IRD assessments and issue of tax payment reminders
- Phone and email support for 5 minute queries and advice
- Invites to relevant educational seminars

*Please note: Basic package price is for a maximum of 3 properties and property sale/purchase processing is additional.*

### CRUISE CONTROL

Package includes:

- Either one of the following accounting software package subscriptions:
  - Xero GST Cashbook
  - MYOB Cashbook
  - BankLink
  - CashManager
- Preparation of annual financial statements and taxation returns
- Filing of taxation returns with IRD
- Checking of IRD assessments and issue of tax payment reminders
- Phone and email support for 5 minute queries and advice
- Invites to relevant educational seminars
- Annual face to face accounting meeting to review your financial statements and tax returns
- Complimentary 1 hour face to face meeting to discuss your business direction and how we can best support you in achieving your business objectives

### ACCELERATOR

Package includes:

- Either one of the following accounting software package subscriptions:
  - Xero Standard
  - MYOB Cashbook or Essentials
  - BankLink
  - CashManager
- Preparation of annual financial statements and taxation returns
- Filing of taxation returns with IRD
- Checking of IRD assessments and issue of tax payment reminders
- Phone and email support for 5 minute queries and advice
- Invites to relevant educational seminars
- Annual face to face accounting meeting to review your financial statements and tax returns
- Complimentary 1 hour face to face meeting to discuss your business direction and how we can best support you in achieving your business objectives
- 1 interim calculation for provisional tax at an instalment date that suits you best
- Presentation of periodic management reports at a frequency relative to your needs
- Preparation of GST returns for you based on relevant information supplied by you

### BOOST

Package includes:

- Either one of the following accounting software package subscriptions:
  - Xero Standard
  - MYOB
  - BankLink
  - CashManager
- Preparation of annual financial statements and taxation returns
- Filing of taxation returns with IRD
- Checking of IRD assessments and issue of tax payment reminders
- Phone and email support for 5 minute queries and advice
- Invites to relevant educational seminars
- Annual face to face accounting meeting to review your financial statements and tax returns
- Complimentary 1 hour face to face meeting to discuss your business direction and how we can best support you in achieving your business objectives
- 1 interim calculation for provisional tax at an instalment date that suits you best
- Presentation of periodic management reports at a frequency relative to your needs
- Preparation of GST returns for you based on relevant information supplied by you
- 1 hour meeting to review progress against your goals and to update direction/ actions to meet these
- 1 hour meeting to assist with annual budget and KPI setting

## 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.