



## iFirm Intranet Users

## Content Guide

### Content Hub

In CCH iFirm Intranet, the Content Hub has been designed to let you easily find CCH Business Fitness NZ content. Divided into 5 key areas, the Content Hub provides a central access point for browsing content.

- The Client (client services)
- Queries (a library of frequently asked questions)
- Workpapers & Calculators
- Coaching (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 a range of 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 preformed

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.

### The Client (client services)

This section incorporates all the services where you interact with your clients, from the initial New Client process, through to 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 the resources listed below to deliver high quality value add services to clients.

- ♥ Company administration, from company formation, through annual

and ongoing admin and 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

### Profit Improvement

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

### Ending

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

### 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 APS, Xero)
- Static workpapers (non-integrated)
- ♥ Livestock workpapers (integrated and non-integrated)

- ♥ Dividend workpapers, includes ICA rec and dividend minutes

### Calculators

- ♥ FBT
- FIF
- Fixed price agreement
- Farmhouse expenses
- ♥ 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
- 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
- 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

### FAQs

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
- Audit
- Bad debts & tax deductions
- ♥ Balance dates
- Benchmarking
- Business interest & RWT
- Business management cycle
- Business structures
- Client gift expenses
- Contractors, schedular payments & withholding tax
- Cost control
- Depreciation
- Employee accommodation
- Employee versus independent contractor
- Employment
- Employment Relations Act & Holidays Act
- Entertainment expenses
- Equity partnerships
- Family businesses
- Farmhouse expenses
- FBT & company 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 methods
- 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
- Reimbursing allowances
- Rental accommodation
- Rental properties — structures & expenses
- Reporting requirements for charities
- 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
- Use of money interest
- Vehicles — lease or buy
- Wage subsidies

### 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)
- Newsletters
- New clients
- Queries and complaints
- Records
- Deletions

#### 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 every month.

Plus you can even say you wrote it! Publish to email, website and social media.

**Accelerate** has both your newsletter and social content sorted.