



SERVICES BROCHURE








A well established Chartered Accountancy company based in Morrinsville, Matamata and Thames with a history of excellence and service to our rural, commercial and personal clients.

Our philosophy is simple; to work closely with our clients assisting them to grow and develop.

We hold strong rural and family values while being a corporate sized business, involved with small to medium sized business entities.

Accountancy is highly specialised and requires expert knowledge. In addition to this, tax-related legislation and changes in accounting practices emerge regularly making it difficult for a non-professional to keep up with current regulations.

The benefits of using CooperAitken include:

-  Peace of mind
-  Saving you time
-  Saving you money
-  Growing your business
-  Giving you freedom




Peace of Mind

CooperAitken can manage all your IRD requirements; ensuring returns are completed correctly and filed on time. This means you are free from worry about facing potential penalties for missing a deadline, or an audit if paperwork is not correct, leaving you free of stress so you can concentrate on the things that are important to you.

Talk to us

We have a great relationship with the IRD and can talk their language; we will be able to find a way forward for you.

We can:

-  Calculate and discuss taxation options with you
-  Talk to the IRD on your behalf
-  Make sure you are maximising all your opportunities

The IRD is more confident when a Chartered Accountant is involved, thereby providing you with much greater support.



Saving you Time

Your time is best spent on what you enjoy, including focusing on your business, rather than number crunching, filling in forms and trying to keep up to date with the latest legislative requirements.

“Thanks to CooperAitken, I can spend my time working on growing my business. While I’m visiting different locations to work with my managers, the team at CooperAitken looks after my GST, staff wages and PAYE, checks my ACC invoices and processes my tax returns. CooperAitken takes time to save me time and lets me get on with other business matters.”

HENRY KONING, KONING FARMS LIMITED, MORRINSVILLE

Saving you Money

For many, the main reason for using a Chartered Accountant is saving money and creating wealth. CooperAitken uses their specialised knowledge to help you create plans to reduce your overall tax bill, monitor spending and identify areas where you can improve performance.

Giving you Freedom

The benefit of working with CooperAitken is we will interpret your information together, and we will be able to:

- Make better business decisions, based on better information
- Identify areas where you can improve performance – be more economical, reduce costs and be more profitable
- Help you understand what makes you money and what costs you money
- Design and review your tax strategies to save you money this year, next year and throughout your life
- Find out how you compare to similar businesses (benchmarking), giving a good indication of which areas can be improved and where you can gain competitive advantage
- Maintain accurate records, reducing worries with the IRD and other statutory bodies
- Increase your business and personal options for the future





Growing your Business

CooperAitken can help you throughout your life ... when times are tough and when times are good!

Starting a New Business

CooperAitken can advise on the best structure for your new venture (Sole Trader, Partnership, Company, Trusts and other options). Correct financial and management decisions made early in your business planning are crucial for your business survival and save time and money in the future.

Let us help you prepare:

-  Business plans, cashflow projections and budgets, all are excellent tools to help you keep track of the dollars and essential when looking for finance
-  A marketing plan to ensure you have the processes in place to reach your target customers more effectively and profitably
-  A strategic plan to ensure your personal aspirations are realised

Managing your Business

Got an idea or need a solution?

Talk to us because we get to know your business almost as well as you do, particularly the financial side. Having input from someone who knows your business, is professionally qualified and does not have the same emotional attachment is priceless. It provides you with another independent person to discuss plans with, or bounce ideas off.

Creating a plan from your ideas

CooperAitken can help you translate your ideas into plans. We create action plans together with profit forecasts, break-even analysis and cashflow forecasting, and we put systems in place to monitor all of these. We also have qualified teams who can assist you with strategic planning and the implementation of these plans.

How do you compare?

How is your business performing compared with your competitors? What is the average bottom line?

Are you spending enough on advertising? Too much on rent? How do your staff costs compare?

We can help with all of this by providing you with benchmarking reports, and interpreting them with you to develop business strategies to improve your bottom line.



"We sat down with the team at CooperAitken when we started our new business and the information we received was worth every cent. We've started our business as we mean to go on and it's been a positive start knowing we can seek professional advice when required."

**SELINA DUNNETT, OWNER,
SHORTCUTZ/DEFINE STYLE,
MORRINSVILLE**







Future Growth

Operational

Growing your business is great, but can present some 'nice to have' problems. For example, you may not have the desire to recruit additional staff to carry out administration such as accounting, payroll, HR and marketing. CooperAitken has an experienced team who can look after this for you.

Strategic

Planning ahead is vital. We can assist with interpreting and providing financial information and advice to better prepare for:

-  Buying and/or merging a business
-  Selling a business
-  Succession planning - allowing you to step away from your business
-  Retirement
-  Estate planning - making sure your assets are dealt with in the manner you choose





"Without continual growth and progress, such words as improvement, achievement and success have no meaning."

BENJAMIN FRANKLIN

Accounting and Tax

Accurate record keeping is an essential requirement for monitoring the financial health of your business, and for making business decisions.

CooperAitken are Chartered Accountants and therefore we offer a full range of accounting and taxation services, including:

-  Preparation of annual accounts and GST returns - we will ensure you are making full and proper use of your allowable expenses and deductions.
-  Cashflow projections and budgets
-  Taxation advice and planning
-  Financial planning, such as the best way to obtain new equipment, or how to raise cash

We will also handle enquires with the IRD on your behalf, and can assist with your ongoing relationship and negotiations with your bank.

With our knowledge and proactive approach we deliver a consistent, high level of service, building a solid relationship with you which will stand the test of time.



Specialist Services

Trust Administration

A trust provides a valuable way of protecting the assets that you have accumulated for the benefit of yourself and others, usually your family. If you are a trustee of a trust there are many obligations and responsibilities that you need to observe. CooperAitken have a dedicated trust team that can provide all the necessary trust administration including keeping the records of your trust well maintained, reminding trustees of significant milestones and dates, and liaising with the trust's solicitor. The team can arrange trust meetings, prepare agendas and complete the minutes. They will obtain and document details of all major decisions.

Trustee Services

CooperAitken can also act as an independent trustee of your trust. The appointment of an independent trustee helps to ensure the integrity of the trust and where this is the case, we will also manage the trust administration for you.

Company Administration

Our dedicated Company Administration team has the specialised knowledge needed to ensure your company is incorporated and IRD

registered, accurately and efficiently, with all statutory documents prepared.

Our Company Administration service will also ensure your company remains compliant, by taking care of company annual returns, maintenance of statutory records and registers, director appointments and resignations, company name changes, share transfers, share increases/decreases, preparation of resolutions and minutes, and deregistration of your company when it is no longer required. When a company structure is the best business solution for you, let our company administration team take care of the formation and compliance, to give you confidence and peace of mind.

Accounting Software – advice and training

The right accounting system can help you to make smart business decisions through clear financial and management reporting. CooperAitken recognises that clients sometimes need help deciding which software is best for them to use and how to get the very best out of it and, with this in mind, we have teams trained to recommend and assist with Xero, BankLink, Cashmanager Rural and MYOB.



Payroll

Administering your payroll can be time consuming, plus employment legislation is growing increasingly complex. We can relieve you of this burden with our payroll service. This includes payslips, filing at the IRD, PAYE, sick pay, annual leave, analysis of staff costs, and administration of incentive and bonus schemes. Even if you have a few employees, you can make savings by engaging us to administer your payroll.

ACC Expertise

We have advisors who can review your ACC. This will ensure you have the right type and level of cover, and your levy is based on the right classification. In addition we can discuss experience-rating and how you can obtain levy discounts by working to reduce risks in your workplace.

Human Resources

We have Human Resource expertise available to help with a range of staffing aspects. Your staff is one of your most important assets. We can assist you to get the best out of your team. Advice includes recruitment, contracts, restructures, annual reviews, training, employment issues, mediation. This can range from 'hands on' practical help to a quick phone call. Seeking a little help and advice early can save you time and money later.

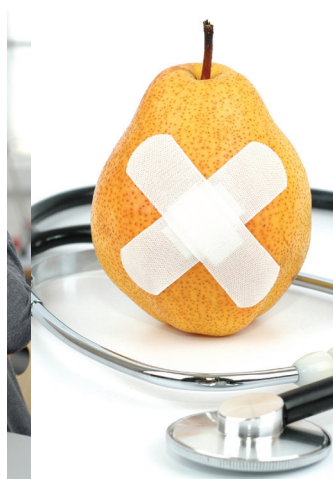
Marketing

Knowing your financial goals and strategies is one aspect of your business. We have qualified expertise able to design marketing and business strategies including the implementation of action plans at an operational level. We can help with one-off campaigns through to a strategic new product launch.

Seminars, Training and Workshops

CooperAitken organises many topical seminars throughout the year. These are held for our clients, the public and our professional peers. We are proud to provide these services to share important and timely information. These have included:

- Financial growth and business success seminars
- Practical financial software workshops - Xero, MYOB, BankLink
- Communication and customer service courses
- Guest speakers on topical issues
- Specialist Services - ACC, Trusts, Human Resources.



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