

Standard Fee Pricing Guide for Business Advisory Accounting & Tax Services Limited

Effective From 1 April 2024



Business Advisory Accounting & Tax Services Limited offers you fixed fees, so you know exactly where you stand. To see how our prices work for you, you're welcome to email us with your latest set of financial statements.

Fees start from

Business Financial Statements	S
Sole-trader financial statements	925
Partnership financial statements	1,000
Look Through Company (Non-Rental) financial statements	1,110
Limited Partnership financial statements (includes general resolutions)	1,200
Company or Trading Trusts financial statements (includes general resolutions and Solvency Certificate)	1,200

Note: These figures will be discounted by 25% if we prepare your full year's GST returns.

Income Tax Returns (includes filing with IRD)	S
IR3 Personal Income Tax Return (For Salary or Wage Earners with no Other Income)	150
IR3 Personal Income Tax Return (For Salary or Wage Earners with Other Income, such as Rental Losses)	230
IR3 Personal Income Tax Return (As a Shareholder of LTC with rental losses)	265
IR3 Personal Income Tax Return (As a Shareholder of Trading Company)	275
IR526 Donations Tax Return	80
IR4 Trading Company Income Tax Return	325
IR6 Trading Trust Income Tax Return	325
IR6 Non-Trading Trust Income Tax Return	300
IR7 Look-Through Company Income Tax Return	275
Fringe benefit tax return	POA
Resident Withholding Tax (RWT)/Approved Issuer Levy (AIL) - monthly	160
Resident Withholding Tax (RWT)/Approved Issuer Levy (AIL) - quarterly	240
Resident Withholding Tax (RWT)/Approved Issuer Levy (AIL) - annually	360

Rental Property Statements (assumes property is not registered for GST).	S
1 Personally Owned Property (one owner - fee includes 1 personal IR3 income tax return)	665
1 Personally Owned Property (two owners - fee includes 2 personal IR3 income tax returns)	885
1 Company Owned Property (includes 1 company IR4 income tax return and up to 2 personal IR3 income tax returns)	800
1 LTC Owned Property (includes 1 company IR7 income tax return and up to 2 personal IR3 income tax returns)	850
1 Trading Trust Owned Property (includes 1 trust IR6 tax return and up to 2 personal IR3 income tax returns)	900
Additional Rental Properties (each subsequent property)	300

Other Tax Returns	S
GST (Monthly)	195
GST (Two Monthly)	325
GST (Six Monthly)	450
Payday Filing (Per Pay Run) - Using Payroll Software	80
Payday Filing (Per Pay Run) - Manual	180
LTC Election / Re-election	200

Annual Business Accounting Packages (paid via monthly automatic payments)	S
Bronze Business Fundamentals (annual sales less than \$250k)	180
Silver Business Fundamentals (annual sales \$250k to \$500k)	199
Gold Business Fundamentals (annual sales \$500k to \$1.0m)	225
Platinum Business Fundamentals (annual sales \$1.0m to \$2.5m)	275
Lite Business Insights (quarterly reports and meetings)	420
Premium Business Insights (bi-monthly reports and meetings)	499
Business Booster (monthly reports and meetings)	649
Other	POA

Advisory Board Attendance (includes up to two hours per meeting, inclusive of planning and travel time)	S
Special Purpose Advisory Meeting - excludes travel allowance at IRD published rates per km	395
Quarterly Advisory meetings - excludes travel allowance at IRD published rates per km	1,100
Two-Monthly Advisory Meetings (5) - excludes travel allowance at IRD published rates per km	1,470
Monthly Advisory Meetings (10) - excludes travel allowance at IRD published rates per km	2,340

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Companies Office Administration	S
Company Formation (includes Companies Office Fees, Opening Resolutions, and \$150 credit towards future services)	650
Companies Office Annual Return (includes Companies Office Fees)	148
Shareholder or Director Changes	99
Company Administration Removal	885
Registered Office Service (Per Month – Minimum 3 Months)	45
Director or Shareholder Resolutions (Per Meeting)	99

Strategic Business Reporting and Management Reports	S
Business Performance, Key Ratios and Indicators, Graphs and Analysis	275
12-Month Budget and Cashflow Forecast	1,495
Benchmarking Analysis and Report	450
Monthly Financial Reports (Cash Basis Only)	280
Monthly Financial Reports (includes stock, depreciation, debtors, and creditors accruals)	400
Others	POA

Consulting (charged on a time and attendance basis, per hour)	S
Director	284
Manager	189
Senior Accountant	168
Intermediate Accountant	126
Junior Accountant or Bookkeeper	95
Administration, Data Entry and Clerical	84

Starting, Buying or Selling a Business (fees from)	S
Initial Consultation (45 minutes) – includes a credit towards future services used within six months	195
60-Point Pre-Purchase Business Health Check	1,995
Start-Up 12-Month Budget and Cashflow Forecast	1,995
Business Valuation	2,495
12-Page Business Plan	2,200

Tax Registration and Management	S
Reminder Letters for Provisional and Terminal Tax (per advice)	20
Provisional Tax Review and Plan	200
IRD Number Application (Individuals)	160
IRD Number Application (Non-Individuals)	240
Employer or GST Registration	125
LTC or Special Tax Code Application	180

Other	S
Customer Due Diligence (per company/trust/director/shareholder/trustees/person)	25
Tax Arrears Instalment Plan	100
Budget, Cashflow or Business Plan Review	595
Xero Set Up and Training (2 hours)	330

Important Notes:

- Our fees are quoted exclusive of GST. Disbursements will be extra.
- Disbursements, representing a service charge of four percent (up to a maximum of \$40.00) may be added to some services.
- Fees exceeding \$500 may be funded through Smart AR.
- Clients not subscribed to a XERO plan will be charged \$72 p.a. if we need to prepare financial statements or income tax returns.
- To qualify for the above estimated fees to prepare tax returns and financial statements, clients must complete our end of year financial questionnaires. This will enable us to collect all relevant information to prepare them.
- These fees are effective from 1 April 2024 and are subject to annual revisions.