

Professional Services Fee Guide for: Business Advisory Accounting, & Tax Services Limited

Effective From 1 April 2026

Our Professional Services Fee Guide outlines our comprehensive range of business advisory, accounting, and tax services. We offer tailored solutions to meet your unique needs, ensuring transparent pricing and expert support.



ANNUAL COMPLIANCE SERVICES - BUSINESS FINANCIAL STATEMENTS (EXCLUDES TAX RETURNS) – FEES FROM	S
Sole-Traders and Partnerships (Non-GST Registered)	785
Sole-Traders and Partnerships (GST Registered)	1,025
Look Through Companies (Non-Rental) - Includes shareholder reporting and annual resolutions.	1,185
Limited Partnerships (includes general resolutions) - Includes annual resolutions and partnership-specific reporting.	1,350
Companies and Trading Trusts (includes general resolutions and Solvency Certificate [companies only])	1,510
If we prepare your full year's GST returns, a 10% discount (capped to \$120) applies to fees. If records are incomplete, unreconciled, or supplied in raw form (e.g. bank statements, paper invoices without summaries), additional fees will be charged at \$110/hour.	

EARLY SUBMISSION DISCOUNT & FLEXIBLE PAYMENT OPTION (FOR COMPLIANCE WORK)	S
Early Submission: Clients who provide completed records and completed checklists by 30 June 2026 and assist us in completing their tax work within 4 weeks of submitting complete source documents qualify for a 10% early submission discount. Where delays are caused after submission (e.g., late replies, missing information, or incomplete documentation), the discount will not apply.	
Flexible Payment Option: We offer flexibility for clients who prefer to spread the cost of their FY27 tax compliance fees. To qualify, clients must provide fully completed records for the year ended 31 March 2026 by 31 July 2026.	

INCOME TAX RETURNS (INCLUDES FILING WITH IRD) - FEES FROM	S
IR3 Personal Income Tax Return: Salary/Wage Only	195
IR3 Personal Income Tax Return: Salary/Wage + Other Income (such as Rental Profit/Losses)	295
IR3 Personal Income Tax Return: Shareholder in Look Through Company (with Rental losses)	315
IR3 Personal Income Tax Return: Shareholder of Trading Company	345
IR526 Donations Tax Return	85
IR4 Trading Company Income Tax Return: Companies with turnover exceeding \$500K will incur an additional \$150 fee.	395
IR6 Trading Trust Income Tax Return	400
IR6 Non-Trading Trust Income Tax Return	345
IR7 Look-Through Company Income Tax Return	345
Fringe Benefit Tax Return / Resident Withholding Tax (RWT) / Approved Issuer Levy (ALL)	POA

ANNUAL RENTAL PROPERTY STATEMENTS (ASSUMES PROPERTY IS NOT REGISTERED FOR GST) - FEES FROM	S
Personally Owned (one or two owners): Properties with high-volume transactions may incur additional fees.	520
Company or LTC Owned	865
Trading Trust Owned	1,075
Additional Rental Properties (per property): Properties with high-volume transactions may incur additional fees.	375

OTHER TAX RETURNS (INCLUDES FILING WITH IRD)	S
GST (Monthly)	210
GST (Two Monthly)	350
GST (Six Monthly)	485
Filing a NIL GST Return	110
Optional GST Return Reviews – for clients who prepare their own returns	210
Payday Filing (Per Pay Run) – Using Payroll Software	85
Payday Filing (Per Pay Run) – Manual	195

CONSULTING (charged on a time and attendance basis, per hour)	S
Director: Complex tax advice, business structuring, advanced tax planning, valuations, IRD disputes, strategic business advice	310
Manager: Supervising compliance work, technical reviews, tax advisory for common scenarios, and general business advisory	250
Senior Accountant: Prepare financial statements, tax returns, compliance reviews, and standard advisory assignments	205
Intermediate Accountant: Support senior with financial statement preparation, reconciliations, basic compliance tasks	150
Junior Accountant or Bookkeeper: Bookkeeping, coding, reconciliations, and data entry under supervision	110
Administration, Data Entry and Clerical: Administrative support, data processing, and records management	90

TAX REGISTRATION AND MANAGEMENT (FEES FROM)	S
Provisional and Terminal Tax Reminders (Per Advice)	55
Provisional Tax Review and Plan: Review obligations and develop a tailored payment plan	240
Tax Pooling Management and Arrangement (Per Instalment)	625
IRD Number Application (Individuals)	170
IRD Number Application (Non-Individuals): For companies, trusts, and other non-individual entities	255
Employer or GST Registration: Includes general advice on obligations and preparing IRD registration forms	160
LTC or Special Tax Code Application: Preparing and filing of Look-Through Company elections or Special Tax Code applications	215
Tax Arrears Instalment Plan: Prepare and negotiate instalment plan with IRD for clients with outstanding tax arrears	135

FIXED FEE ACCOUNTING PACKAGES (paid by monthly automatic payments) – monthly fees start from	S
Onyx: Includes end-of-year financial accounts, one income tax return, email support for basic compliance related questions (up to 3 queries per year related to simple questions about forms, filing deadlines, or basic tax clarifications.). Ideal for sole traders, investment property owners, freelancers, or micro-businesses needing basic compliance and minimal ongoing support.	100
Sapphire: Everything in Onyx, PLUS 2-monthly or 6-monthly GST returns, 2-monthly basic year-to-date reports. Small to medium-sized businesses that require regular compliance with GST returns and basic financial reporting, but don't need extensive advisory services or ongoing, hands-on financial management.	270
Opal: Everything in Sapphire, PLUS monthly year-to-date financial reports, six-monthly advisory virtual meeting. Ideal for businesses that are growing or scaling, and need regular reporting, strategic input, and guidance on financial planning.	425
Pounamu: Everything in Opal, PLUS customised monthly year-to-date financial reports, quarterly cash flow forecasting and budgeting, quarterly advisory virtual meetings. Ideal for businesses that require extensive financial oversight, detailed reporting, and regular, high-level advisory to make informed strategic decisions about growth, tax planning, and business structure.	640

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COMPANY ADMINISTRATION	S
Company Formation (includes Companies Office Fee, Opening Resolutions, \$150 credit towards future compliance services)	795
Companies Office Annual Return (includes Companies Office Fees)	155
Standard Shareholder/Director Change: Simple updates (name/ address, appointment/ resignation). No resolution included.	90
Complex Shareholder/Director Change: Multiple updates in one transaction, removal of multiple directors/shareholders.	POA
Company Liquidation (from)	1,075
Registered Office Service (Per Month – Minimum 3 Months)	55
Director or Shareholder Resolutions (Up to Four Standard Resolutions Per Meeting)	80

FIXED FEE BOOKKEEPING (paid via monthly automatic payments)	S
Baseline: Covers coding up to 50 bank and credit card transactions per month. Excludes GST returns and payroll services. Ideal for sole traders, investment property owners, freelancers, or micro-businesses who require only basic bookkeeping services to stay compliant without complex reporting needs.	80
Core Essentials: Coding up to 100 bank and credit card transactions per month, preparing and e-filing bi-monthly or six-monthly GST returns with IRD, and regular basic monthly YTD financial reports. Ideal for sole traders, freelancers, or micro-businesses with moderate transaction volumes that require regular bookkeeping, basic GST compliance, and regular basic financial reports but do not need in-depth advisory services or payroll processing.	215
CUSTOMISED OPTIONS	
Additional Transactions Per Month: Add coding for up to an extra 100 transactions per month for businesses with higher transaction volumes. Price for each 0-100 additional transactions, up to additional 400 transactions.	55
Monthly GST Returns: Upgrade from two-monthly or six-monthly GST returns to monthly GST filings, providing more frequent compliance for businesses that prefer or require it.	105
Reporting Frequency (Two-Monthly): Switch from monthly YTD reports to two-monthly reporting, providing updates less frequently but still regularly enough for businesses that do not need constant oversight. Price includes \$25 per month discount.	-25
Reporting Frequency (Six-Monthly): For businesses preferring six-monthly reporting, this option reduces the reporting frequency. Ideal for those with minimal reporting needs but require periodic insights. Price includes \$35 per month discount.	-35
Tailored Package: For businesses with unique or more complex needs, we offer tailored bookkeeping services. These can include a mix of coding high transaction volumes, customised reporting schedules, payroll processing, or advanced GST compliance. Tailored packages are designed to meet your specific requirements, with pricing available upon request.	POA

STARTING, BUYING OR SELLING A BUSINESS (FEES FROM)	S
1-hour consultation – includes \$100 credit towards future compliance services used within six months	350
Quick Insight (20-Point Review): Covers key financial indicators, revenue trends, major expenses, and basic risk assessment. Ideal for buyers needing a high-level financial health check.	795
Business Focus (40-Point Review): Covers financial stability, major contracts, key operational risks, supplier/customer concentration, tax/GST compliance. Ideal for buyers needing a more detailed financial and operational review.	1,595
Deep Dive (60-Point Review): Covers everything in the 40-point review PLUS cash flow projections, market analysis, HR/legal issues, and tax structuring. Idea for buyers making a significant investment and require extensive due diligence.	3,200
12-Month Budget and Cashflow Forecast: Covers forecasting revenue, expenses, and cash flow.	1,325
Business Plan: Includes detailed financial projections, market analysis, operational strategy, and risk assessment.	2,150
Business Valuations: Covers financial modelling, profit analysis, asset-based valuation, benchmarking, and tax implications.	3,750

BOOKKEEPING, ACCOUNTING, BUSINESS ADVISORY AND TAX SOLUTIONS (Hourly Rates)	S
Transaction Management and Admin Support: On-demand financial administration, including transaction coding, managing payables and receivables, and ledger maintenance. This helps ensure financial accuracy, proper GST application, and well-maintained records for tax compliance. Ideal for businesses requiring additional support beyond fixed-fee bookkeeping packages. Rates may be adjusted based on the complexity of the task and required level of expertise.	100
Core Financial Compliance: Cash flow forecasts, actual vs. budget reports, and income & expenditure summaries to monitor financial health and provide structured financial oversight, allowing businesses to make informed decisions while maintaining compliance with reporting requirements. Ideal for businesses that require regular financial monitoring and planning.	155
Core Business and Tax Advice: Tailored tax and business advice beyond standard GST and payroll compliance. Includes provisional tax estimates, GST treatment for complex transactions, business structuring advice, and operational tax planning. Ideal for business owners requiring one-off guidance on tax matters that impact financial performance and compliance.	210
Business Advisory Services: Strategic financial and operational guidance to support business growth, performance, and scalability. Services include developing business plans, optimising business structures, creating detailed budgets, formulating marketing strategies, and assisting with loan applications. Ideal for businesses requiring structured decision-making support.	260
Tax Advisory Services: High-level tax strategy, structuring, and compliance risk management. complex tax matters, tax disputes, tax efficiency planning, investment and financing structures, shareholding arrangements, business valuations, and due diligence for major transactions (buying/selling property and businesses).	330
Virtual CFO Services: Ongoing strategic financial leadership and oversight without the cost of a full-time CFO. Includes financial strategy, forecasting, performance monitoring, cash flow management, and executive-level reporting.	POA (min \$340)
Independent Director Services: Providing impartial oversight and corporate governance expertise. Includes board participation, compliance oversight, risk management, and strategic advisory at the director level. This service is designed for companies seeking an independent expert to guide decision-making and uphold governance standards.	POA (min \$340)
Enterprise Risk Management (ERM): Identifying, assessing, and mitigating financial, operational, and strategic risks across an organisation. Includes developing risk frameworks, compliance strategies, fraud prevention measures, and scenario planning to align risk management with business strategy. Ideal for businesses seeking to proactively manage risks to protect assets.	POA (min \$340)

OTHER	S
Warrant of Fitness (WOF): Includes benchmarking, financial performance analysis, strategic improvement insights – fees from.	795
Xero Set Up: Set up for new business, including bank feeds, dashboard, custom invoices, account names, logins, and more.	350
Xero Quick Guidance (30 minutes' 1-1 training): Focused training on specific features (e.g. bank reconciliations, invoicing, etc).	85
Xero Essentials (90 minutes' 1-1 training): For beginners with foundational knowledge to navigate and use Xero's key features.	240

IMPORTANT NOTES:

1. Fees are quoted exclusive of GST. Our financial statement and income tax return services may be more cost-effective if you choose to spread payments across the year. Contact us to discuss flexible payment options.
2. Disbursements and Service Charges: A service charge of 5% (up to a maximum of \$40 per invoice) may be applied to some services to cover administrative costs, compliance fees, and external processing charges.
3. Fee Adjustments Based on Business Requirements: Fees are subject to formally assessing your needs. Xero and tax management software subscriptions are charged separately where applicable, ensuring you only pay for the software that aligns with your needs.
4. These fees are effective from 1 April 2026 and are subject to an annual review to ensure they remain aligned with market conditions, compliance requirements, and service costs.