



Grad Pack
2019

Polson Higgs Training

Polson Higgs offers a range of professional training across all our business disciplines. Our practical approach combines technical information with insights and examples from experienced practitioners.

Tax Update Webinars

One of the biggest challenges professionals face is keeping up-to-date with changes to rules and legislation. Polson Higgs and Brandt Segedin offer monthly Tax Update Webinars to keep you up-to-date with current issues and compliance matters. These webinars are perfect for partners and seniors.



Tech Savvy Webinars

Let us help you train your team. Tech Savvy Webinars target common training areas with practical knowledge and examples that are directly transferable to the workforce. Our presenters know time is precious, so we keep the webinars short, focused and cost effective. Tech Savvy is ideal for junior and intermediate staff gaining new knowledge, or for a collective refresh training session.

Special Edition Webinars

Professionals need clear, concise information and perspectives on important issues that impact on clients and shape business and compliance. Special Edition Webinars provide depth of knowledge and understanding to current and emerging issues. Special Edition Webinars are for anyone who needs to maintain their professional knowledge and add value to their clients.

Recordings & Templates

All of our webinars are available as recordings, if you can't attend on the day. This also means that we have a significant library of material available for you to use.

Aside from the recordings we also provide up-to-date templates for your use when appropriate.

Introducing the “Grad Pack” 2019

New Graduates and team members “new” to accounting, form an important part of any accounting firm. They bring new ideas and energy into existing firms and provide your leaders of tomorrow. Polson Higgs are unequivocal supporters of employing new grads, and the need to ensure that they get the right training. **The Grad Pack** was created specifically to fulfil that need.

Objectives...

The **Grad Pack** has the following three key objectives:

- Support your firm’s internal training with expert third party training.
- Ensure that your grads have a strong foundation to develop from.
- Create a collegiate supportive environment for your grads.

2019...

During 2019 we will provide your grads with over 10 hours of high-quality targeted training and support:

- In April two 1.5-hour **Special Edition** webinars – “**Introduction to Tax**”. These two webinars provide the important foundation knowledge of tax and compliance.
- From April to December there are five **Tech Savvy** webinars of 1.25-hours. These will cover the important core topics of:
 - FIFs and PIEs
 - Farming
 - Rental Properties
 - GST
 - FBT
- In July and November special 45-minute case study and Q&A interactive sessions.

Limited to 30 places...

Because we need to ensure that your grads receive the highest level of support, the **Grad Pack** is strictly limited to 30 grads.

Your training team...

The **Grad Pack** has been developed and will be delivered by Polson Higgs’ David Hogue and Ryan Ehlers.

Being responsible for the training of Polson Higgs’ own grads, David and Ryan understand exactly what your grads need to learn. They have placed a strong emphasises on the **practical** applications, not just theory.



Ryan Ehlers



David Hogue

Your investment...

We understand that employing a grad is a significant investment by any firm, and it is important that investment is protected.

The **Grad Pack** shows your commitment to your grads, and at \$826.09 (ex GST) for 10.75 hours of training it is excellent value (**limited to 30 attendees**).

If you are unable to secure a place on the **Grad Pack** or would prefer that we supply just the webinars and you look after the rest, the **Grad Pack Lite** at \$704.35 (ex GST) is available.

The Webinars...

Polson Higgs has created a unique combination of webinars, live streaming events and mentoring options to deliver the Grad Pack. Structured from February to December 2019 its delivery is designed to work alongside your own training and enhance the Grads development.

Introduction to Tax...

Two 1.5-hour webinars creating the foundation in April.

Session One:

- *Sources of taxable income*
 - Business income
 - PAYE income
 - Schedular income
 - Investment income
- *Expenses*
 - Relationship to income nexus
 - Specific non-deductible expenses
 - Capital expenditure
- *GST Returns*
 - Taxable supplies
 - Input deductions
 - Filing frequency and basis

Session Two:

- *Income Tax*
 - Tax Rates
 - Income allocation methods
 - Tax returns
- *Provisional Tax*
 - Methods
 - Payment Dates
 - Tax returns
 - Filing time
 - Types
 - IR10
- *Imputation credits*
 - Accounts
 - Dividends
- *PAYE*

The Tech Savvy

Five 1.25-hour webinars covering the core topics that Grads will encounter

April

- *FIFs and PIEs*
 - Foreign Tax credits and FIF income
 - PIE investments – common errors
 - How to read portfolio reports and what to look for
 - And much more...

June

- *Farming*
 - Valuation methods for livestock
 - What is farm development expenditure?
 - Expenses specific to farmers
 - And much more...

August

- *Rental Properties*
 - Bright line test
 - Ownership structures
 - Repairs and maintenance vs. capital
 - And more...

October

- *GST*
 - Overview of the regime
 - Taxable, exempt and zero-rated supplies
 - Apportionments and adjustments
 - And more...

December

- *FBT*
 - Overview of the regime
 - Shareholder employees
 - Motor Vehicles
 - And more...

The Interactive...

The webinars are a great way to train, but because of the large numbers attending it is not possible to interact at anything other than a high level.

So, to compliment the webinars Polson Higgs has developed two interactive live streaming Q&A sessions, run in July and November.

Interactive Q&A sessions...

This is why we limit the pack to 30 places:

As part of creating this programme we consulted with our own grads, to see what they wanted and valued.

They agreed that the more informal sessions, where you just asked questions worked particularly well, as it was focused on what they were either interested in or struggling with.

They also confessed that there were still questions that they wouldn't ask because they didn't want their Managers to think they couldn't perform. We all understand that this is simple human nature, and most of us will struggle on or try and find the answer ourselves.

In response to this we have created the **landmark "Interactive Q&A" sessions**. These two 45-minute interactive live sessions are structured, so your grads can ask the questions that they feel uncomfortable asking.

Before each session your grad will be asked to prepare a list of questions or topics that **THEY** want answered or discussed.

From those questions we will create a series of interactive case studies for the grads to work with.

The session will be streamed live and your grad will be able to join the discussion. Unlike in a webinar this is not a "written question" only format, but an open discussion on a peer-to-peer level led by Polson Higgs' David Hogue and Ryan Ehlers.

Run in June and October the formatting of the 45-minute sessions is structured for the greatest amount of interaction from your grads.



Your Options...

Have you heard the joke about the two managers talking about training Grads? The first asks, "Yeah, but what if we train them, and they just leave us?" The second one responds, "What if we don't train them, and they stay?"

We understand that different firms will have different needs, so we have put together two packs, the **Grad Pack**, and the **Grad Pack Lite**.

Grad Pack...

Strictly limited to 30 places – order now

Includes **10.75 hours of CPD** training:

- Two 1.5-hour Special Edition Webinar – Introduction to Tax.
- Five 1.25-hour Tech Savvy webinars on core topics.
- Two 45-minute case study and Q&A interactive sessions.

Standard	\$956.52	\$1,100.00 (inc GST)
Loyalty	\$826.09	\$950.00 (inc GST)

Grad Pack Lite...

Includes **9.25 hours of CPD** training:

- Two 1.5-hour Special Edition Webinars – Introduction to Tax.
- Five 1.25-hour Tech Savvy webinars on core topics.

Standard	\$813.04	\$935.00 (inc GST)
Loyalty	\$704.35	\$810.00 (inc GST)

Our Grad "Consultants"...

We asked our Grads what they wanted

As part of developing this package we asked our 2017 grads Cate and Charles what they would want, and they said:

"Good solid base on Tax, because that's all we seem to do"

The Grad Pack has 3 hours on introduction to tax.

"The big half day training sessions, were just too long, one-and-a-half or two hours max".

All sessions are under two hours – short and sharp.

"I felt silly asking the same questions, would have been nice to ask someone outside of the firm who wasn't judging me".

The interactive Q&A was designed because of this comment.

"We took notes, but it would have been great to be able to go back over stuff, hear it again".

All the webinars and sessions are recorded, and you will receive copies. This means you can listen again and go back over anything.



Book online ▶

Your Team...

Polson Higgs has assembled one of New Zealand's leading Training Teams. With critical combination of both accounting and legal experience, they are responsible for the development of all our training products.

Michael Turner



Michael is a Tax Partner at Polson Higgs and has presented extensively on tax matters over the last 20 years. He is currently a member of the Institute's National Tax Advisory Group and has previously been a lecturer at the University of Otago in Taxation. He also advises a large number of small businesses, Chartered Accountants and Lawyers on tax issues.

Karen Sullivan



Karen is a Tax Consultant with Polson Higgs. She has experience in providing tax advice for a wide range of businesses, including SMEs. Her focus is on finding practical and easily understandable solutions to often complex tax issues.



David Hogue

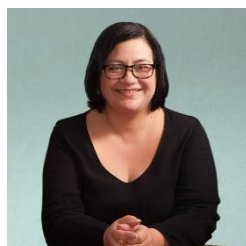
As an Assistant Manager at Polson Higgs, David is regularly assisting staff with tax concepts. He has experience both in practice and in business working through the various tax compliance issues SME businesses are likely to encounter.



Ryan Ehlers

Ryan is a Manager in the Tax Division. He is involved in both day-to-day compliance work for corporate clients, SMEs and other professionals, as well as providing specific tax advice on individual transactions.

Caron Solomon-Ward



Caron is a Tax Consultant in our Tax Division. She works with a variety of commercial and not-for-profit clients in a range of areas. She has a background in policy implementation and is experienced with IRD debt management and audit interactions.



PolsonHiggs

Business advisors

Better
business
together.

139 Moray Place, Dunedin 9016

PO Box 5346, Dunedin 9058

Phone 03 477 9923

training@ph.co.nz

ph.co.nz