

The Balance Sheet - June 2016

Hi Morrison,

In this issue:

- The Life Organiser
- Audit Shield - Accountancy Insurance
- Phishing Scam
- Morrison Creed Team Update
- Presentations and Training

The Life Organiser?

- If your home was destroyed, would you have copies of all of your essential documents?
- Do your family know where to find your insurance policies, vehicle ownership papers, etc?
- Do you have your phone, electricity and other household service suppliers' details all in one place?

Like most of us you probably have all of these items around the house somewhere!!! Wouldn't it be great to have all this information readily available in one place?

We have created a comprehensive electronic template to store all your important information including personal, financial, property, insurance and business details.

For more information contact Diane on 353 6901 or email diane@morrisoncreed.co.nz

Audit Shield - Accountancy Insurance

We have responded to the growing threat of random audits, reviews and investigations being carried out by the Inland Revenue Department by finding the best tax audit insurance available and are pleased to offer this to our clients.

The Audit Shield Service is fully tax deductible for businesses and self-employed providing you with comprehensive relief from audit, review and investigation costs. It covers:

- Our accounting fees in responding to audits, reviews, investigations on your lodged returns, including those from previous years
- Specialist's professional fees if we need to engage a tax expert or lawyer for an opinion or defence
- Cover commences from as little as \$295 for a business group and \$95 for an individual.

You will have received a letter from us explaining the policy and inviting you to participate under our master policy. Should you have any queries in relation to the offer we encourage you to contact our office.

Phishing Scam

Over the past two weeks Inland Revenue has received reports of a telephone phishing scam from several hundred customers around New Zealand.

The scam calls have been made to landlines and mobile phones, with messages being left on voicemail if the calls haven't been answered.

The callers state that they are from the Inland Revenue Department and the following scenarios have been reported, that the customer:

- is wanted for historic tax evasion or tax avoidance
- has a red flag on their file
- is in debt and they or their lawyer must return the call as soon as possible. Some customers have been told to make a payment via Western Union within 30 minutes, or risk arrest.

If you receive a suspicious phonecall or email please contact the Inland Revenue Department and they will be able to confirm if the contact was legitimate or not.

Morrison Creed Team Update

Kathy Mainwaring is the most recent member to join the team. Kathy has a background in banking and business administration and became an Associate Chartered Accountant in 2013.

Kathy enjoys working with clients to achieve their goals while also building great client relationships.

Presentations and Training

For certain presentation topics we enlist the experts in their chosen fields to present. Most recently we had Alastair Hall from Fitzherbert Rowe presenting on Health and Safety. Due to demand we had to schedule a second presentation which is now also a sellout. We also hosted Chris Partridge a Payroll and Employer Obligations specialist earlier in the month.

A new presentation topic this year is 7 Ways to Grow Your Business. We held a larger event last year on this topic with 100 attendees. Due to the success of this event we decided to include it in our presentation schedule for 2016. If you are a business owner and are yet to attend we highly recommend coming along, our next event is scheduled for Thursday 14th July @ 3.30pm with maximum of 20 attendees.

We recommend registering early for our presentations to avoid disappointment, so keep an eye out for our monthly upcoming events email. As the saying goes "First in First Served"

If you don't currently receive our monthly events newsletter simply give us a call or email diane@morrisoncreed.co.nz and we can get you subscribed so you don't miss any of our upcoming events.



Best regards,

The Team at Morrison Creed

© Copyright 2012 Morrison Creed Advisory Ltd. All Rights Reserved .

You're receiving this because you subscribed via our website. If you would rather not receive this email click the unsubscribe link below.

[View in your browser](#) | [Unsubscribe](#)