



# French services team

Baker Tilly Staples Rodway is one of the largest fiscal advisory and services firms in New Zealand. We tailor our industry expertise to meet the unique needs of our francophone clients.

**Now, for tomorrow**

# Our business is to add value to your business

Our service approach will ensure that you understand and have confidence you are meeting your New Zealand obligations while taking account of the different cultural approaches.

We aim to develop a collaborative relationship with you, understand how civil law expectations can influence your preconceptions, and communicate how New Zealand tax law operates in a meaningful way.



**Mike Rudd**  
Director, Taxation



**Lee Harris**  
Administrator



**Paul Bourdat**  
Senior Collaborator

## Our services

### **Business advisory, compliance & tax**

Unexpected taxes can significantly alter the success of your project, and on-going compliance is an important consideration. New Zealand advisors represent vendors and purchasers independently, so specialist tax advice is essential to ensure you reach your objectives.

We can provide you with a full suite of accounting and tax services, including:

- Business due diligence and valuations
- Tax structure planning
- Outsourcing day to day accounting functions
- Preparation of statutory financial statements, income tax, GST and fringe benefit tax returns
- Regularisation negotiations and assistance with disputes with Inland Revenue
- Cashflow budgeting and variance analysis
- Corporate services, including board of director representation, governance and management, shareholder distribution advice
- Xero services

### **Estate planning**

Estate planning that appears to be attractive under New Zealand law can often become ineffective once foreign implications are added into the equation.

For example, the use of New Zealand trusts involving French residents is, as a general rule, to be avoided, due to the French civil law requirement for ongoing reporting and, if obligations aren't met, extensive penalties. This includes trusts set up in testamentary documents, such as in wills.

With our contacts and competencies, we can communicate directly with your francophone advisors so that you have certainty that your estate planning will deliver the desired outcome – both in New Zealand and overseas.

New Zealand has now adopted the OECD's automatic exchange of information convention with 100+ jurisdictions. All relevant tax authorities will therefore receive your New Zealand income and beneficial ownership interest details – automatically.

It is therefore critical that you have a partner, like Baker Tilly Staples Rodway, who has the right skills to assist with your civil law compliance obligations.

### **Establishment in New Zealand**

In conjunction with your immigration advisor, we can assist you and your family to best structure your personal and business affairs. For example, New Zealand's transitional residency tax regime could enable you to leave certain income outside of the New Zealand tax net – either temporarily or permanently. It is essential that you order your affairs correctly from the outset.

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### **About Baker Tilly Staples Rodway**

Baker Tilly Staples Rodway is a national association of independent practices, with eight locations throughout New Zealand.

We are proud to be a member of Baker Tilly International, a top ten global network of independent accounting and business advisory firms, whose member firms share our dedication to exceptional client service.



### **Contact us**

Mike Rudd  
Director, Tax  
mike.rudd@bakertillysr.nz  
T: +64 9 373 1137

Kaison Chang  
Director, Business Advice  
kaison.chang@bakertillysr.nz  
T: +64 9 968 9194

[www.bakertillysr.nz](http://www.bakertillysr.nz)