



**YOUR TRUSTED
TAX & BUSINESS
ADVISOR**

THE ACCOUNTANTS
& TAX AGENTS
INSTITUTE OF NEW
ZEALAND (ATAINZ) IS
AN INCORPORATED
SOCIETY ESTABLISHED
IN 1976

WHO ARE WE?

ATAINZ IS FOCUSED ON EMPOWERING AND RESOURCING MEMBERS TO PROVIDE PROFESSIONAL ACCOUNTING, TAXATION AND BUSINESS ADVICE TO SMALL AND MEDIUM BUSINESSES IN NEW ZEALAND.

“YOUR TRUSTED TAX & BUSINESS ADVISOR”.

In 2017 the Institute changed its governance structure from a President and Council to that of a Chairperson and Board and appointed its first CEO.

In 2018 new membership categories were introduced for ATAINZ Members:

- Professional Tax & Business Advisor (PTBA).
- Associate Tax & Business Advisor (ATBA).
- Additionally a new “Student” membership category was also introduced.

ATAINZ’s objects include:

- To represent ATAINZ members;
- To advance & foster tax knowledge amongst members;
- To further and develop good business practice amongst members;
- Maintaining the highest standards among ATAINZ members by restricting membership to suitably qualified people; and
- Considering, initiating debate and making submissions on New Zealand tax laws.

ATAINZ has approximately 400 members throughout New Zealand representing 100,000 tax payers. Membership is restricted to tax agents, or people with suitable qualifications and/or work experience relating to accounting and/or tax matters.

ATAINZ is one of only three organisations granted ‘approved advisor group’ status by the Inland Revenue Department.

ACC recognise ATAINZ members as having a special relationship with them and by providing their name and members number, members have access to their client’s data at ACC.

ATAINZ members provide a wide range of services including:

- Accounting,
- Business mentoring,
- Reviews,
- Valuations,
- Company Incorporations,
- Tax advice, and
- Tax agency work.

Members’ clients include business owners, self-employed, partnerships, companies, investors, salary and wage earners, superannuitants, agents, rental income earners, farmers, estates and trusts.

ATAINZ supports its Members and helps to maintain high standards in a variety of ways. The Institute runs courses, conferences and seminars to support Members’ continuing professional development and ensure they are up to date with developments in tax law.

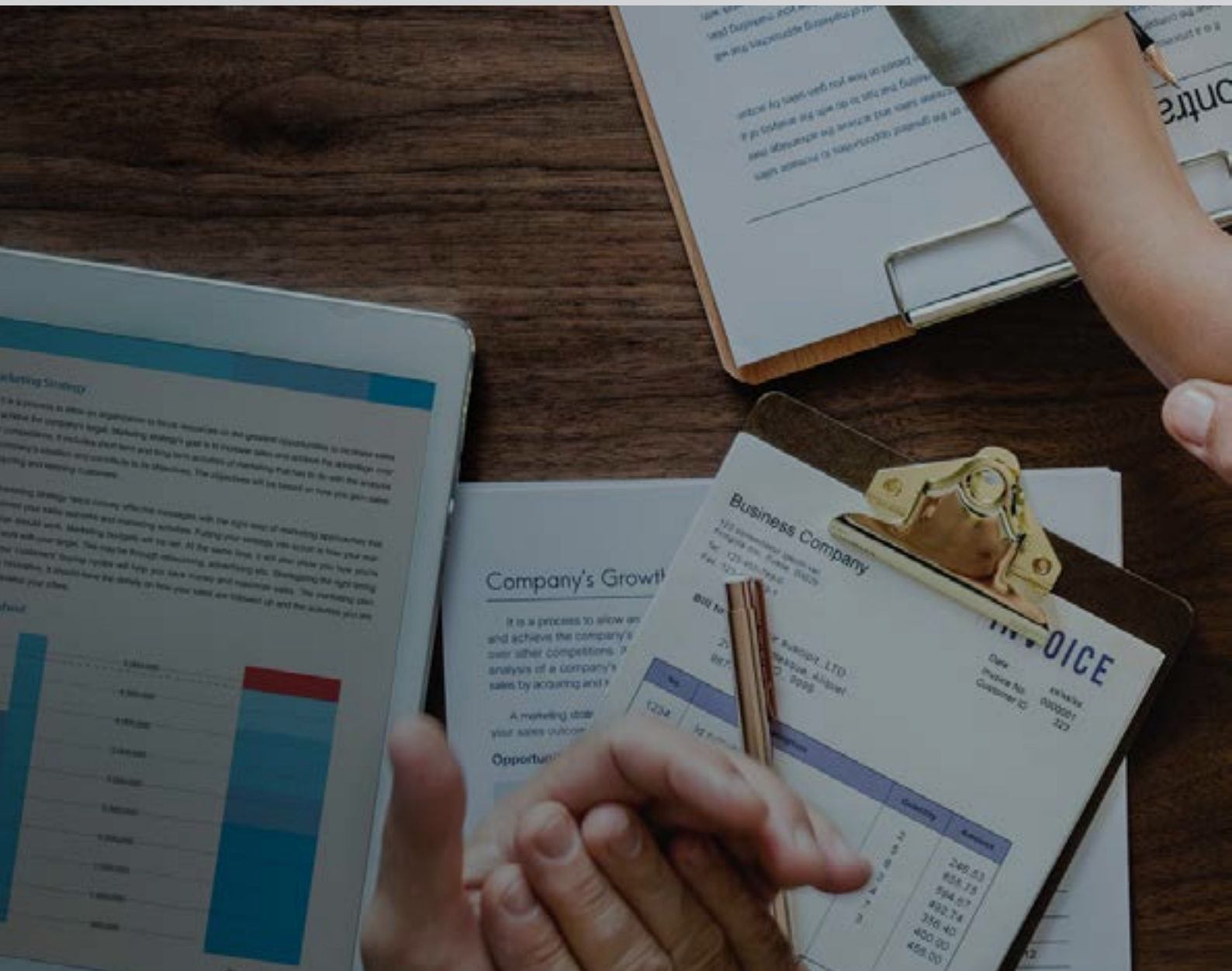
It also provides resources as well as opportunities for Members to share information.

All ATAINZ members must comply with a Code of Ethics, which covers four main areas:

- Integrity;
- Trust and confidence;
- Standards of service; and
- Professional conduct.

VISION STATEMENT

ATAINZ TO BE RECOGNISED AS THE VOICE OF
SMALL AND MEDIUM BUSINESS (SME) IN NEW ZEALAND



MISSION STATEMENT

EMPOWERING MEMBERS TO BE RECOGNISED AS TRUSTED
ADVISORS IN THE BUSINESS COMMUNITY





ATAINZ OBJECTIVES

ATAINZ's objects are:

- a. To foster tax knowledge in New Zealand
- b. To further and develop tax practice in New Zealand
- c. To represent ATAINZ members in New Zealand
- d. To maintain the highest standards among ATAINZ members by restricting Membership to suitably qualified people
- e. To consider, initiate debate and make submissions on New Zealand tax laws
- f. To provide bursaries and scholarships for education
- g. To provide prizes for examinations and essays or papers on taxation
- h. To publish or broadcast material that furthers these objects
- i. To provide information to Members
- j. To seek recognition and financial support to further these objects
- k. To federate with, affiliate with, or act in conjunction with other institutes and associations, and appoint representatives to any such associations
- l. To provide premises for ATAINZ work and meetings
- m. To employ staff and agents
- n. To establish branch offices and committees
- o. To buy, sell, lease, alter and maintain land, buildings or other property as the Board sees fit
- p. To raise or borrow money, repay borrowings, invest, and otherwise manage ATAINZ finances as the Board sees fit
- q. To do anything else that, in the view of the Board, furthers ATAINZ's objects
- r. To provide benefits and resources to members through associations.

OUR BOARD



OUR BOARD

Chairperson:	Richard Abel (Nelson) elected 2018. Elected to Council 2017
Vice-Chairperson:	Michelle Thompson (Auckland) elected 2018
Board Members:	Tom Boyes (Canterbury) elected 2014 Mike Davies (Bay of Plenty - Taupo) elected 2016 Lance Green (Wanganui - Manawatu) elected 2016 Rollo Webb (Waikato) elected 2018

BOARD ROLES

Director of Relationships	Richard Abel
Director of Finance	Tom Boyes
Director of Membership	Lance Green
Director of Standards	Mike Davies
Director of Education and Professional Development	Michelle Thompson
Director of Practice Review	Rollo Webb
Chief Executive Officer	Gary Upson

ATAINZ VALUES

- **INTEGRITY**
 - PROFESSIONALISM
 - STANDARDS
 - ETHICAL
- **MEMBERSHIP FOCUSED**
 - DYNAMIC
 - RELEVANT
 - INCLUSIVE BODY
- **QUALITY OF SERVICE TO SME'S**
- **ASPIRATIONAL**
 - LEADERSHIP
 - GOOD CITIZENSHIP

APPROVED ADVISOR GROUP

ATAINZ IS ONE OF ONLY THREE ORGANISATIONS TO HAVE RECEIVED “APPROVED ADVISOR GROUP” STATUS BY THE INLAND REVENUE DEPARTMENT.



The others are:

- Chartered Accountants Australia & New Zealand, and
- CPA Australia.

What is an approved advisor group?

An “approved advisor group” is defined in section 20B(5) as a group that includes natural persons who meet all of the following requirements:

- They have a significant function of giving advice on the operation and effect of tax laws.
- They are subject to a professional code of conduct in giving that advice.
- They are subject to a disciplinary process that enforces compliance with the code of conduct.

MEMBERSHIP

In March 2018 ATAINZ changed its membership structure and now offers the following Memberships:

- Professional Tax & Business Advisor (PTBA)
- Associate Tax & Business Advisor (ATBA)
- Retired Member
- Fellow
- Student Member

Professional Tax & Business Advisor (PTBA)

To become a Professional Tax & Business Advisor (PTBA) a person must be a New Zealand resident as defined under the Immigration Act 2009 (and subsequent amendments) and must be a practicing Tax Agent as defined by the Taxation Administration Act.

A Professional Tax & Business Advisor (PTBA) must:

- Have been an Associate Tax & Business Advisor (ATBA) for the preceding two years, and have completed all Continuing Education requirements during that time, or
- Have a New Zealand degree or equivalent qualification in accounting, or in business studies, and has completed a tax unit as part of that course and has a minimum of 3 years experience in their own tax practice, or
- Otherwise satisfies the Board that he or she has sufficient qualifications and experience to become a Professional Tax & Business Advisor (PTBA).

Professional Tax & Business Advisors (PTBA) shall:

- Comply with ATAINZ's Continuing Education requirements, and
- Be subject to Practice Reviews.

Professional Tax & Business Advisors (PTBA) shall have voting rights and will be eligible to hold a position on the Board of ATAINZ.

Associate Tax & Business Advisor (ATBA)

To become an Associate Tax & Business Advisor (ATBA) a person must be a New Zealand resident as defined under the Immigration Act 2009 (and subsequent amendments) and must:

- Have a New Zealand degree or equivalent qualification in accounting or in business studies, or
- Have an appropriate New Zealand recognised tertiary qualification, or
- Otherwise satisfies the Board that he or she has sufficient qualifications and expertise to become an Associate Tax & Business Advisor (ATBA).

Associate Tax & Business Advisors (ATBA) shall be required to comply with ATAINZ's Continuing Education requirements.

Associate Tax & Business Advisors (ATBA) shall have voting rights and will be eligible to hold a position on the Board of ATAINZ.

Retired Members

Retired Members must have retired and shall not be practicing Tax Agents.

Retired Members are not required to comply with ATAINZ's Continuing Education requirements.

Retired Members shall not have voting rights, nor will they be eligible to hold a position on the Board of ATAINZ, but may be co-opted to the Board for special projects without Board voting rights and can be a member of the Practice Review and or Disciplinary Committee.



Fellow

A Fellow is any Professional Tax & Business Advisor (PTBA) or Associate Tax & Business Advisor (ATBA) who:

- a) Has consistently displayed acumen, integrity and proficiency in taxation matters, or delivered exceptional service to ATAINZ over an extended period of time, and
- b) Has been nominated and seconded in writing by a minimum of two Members, and
- c) Been confirmed by the Board, and
- d) After notice of the nomination has been forwarded to all Members, has been elected to the position of Fellow by a majority of Members at an AGM that both the Fellow Nomination and the member nominating are present at.

A Fellow shall retain all the rights of a Professional Tax & Business Advisor (PTBA) or an Associate Tax & Business Advisor (ATBA).

Student Members

Student Membership is open to any New Zealand Resident as defined under the Immigration Act 2009 (and subsequent amendments) currently studying Accounting or Business Studies (full or part time) at a New Zealand approved tertiary institution, and has paid the Application Fee.

A person may only be a Student member for a maximum of 5 years, but may be extended with Board approval.

Student members are not required to comply with ATAINZ's Continuing Education requirements but must complete an Annual Study Declaration.

Student Members shall not have voting rights, nor will they be eligible to hold a position on the Board of ATAINZ, but will be eligible to be co-opted to the position of Student Representative on the Board if required.

Current Members

Membership is nationwide and is currently categorised by region, with a Regional Co-ordinator responsible for organising regional meetings for ATAINZ members.

Current regional based membership (at December 2018) is as follows:

Region	Members
Auckland	131
Bay of Plenty/Taupo	44
Canterbury	37
Gisborne/Hawkes Bay	29
Nelson/Marlborough	10
Northland	20
Otago	7
Southland	2
Waikato	33
Wairarapa	2
Wellington	42
West Coast	1
Whanganui/Manawatu/Taranaki	32

ATAINZ MEMBERS CAN
SELECT COURSES THAT
CONTRIBUTE TOWARDS
THEIR CONTINUING
EDUCATION &
PROFESSIONAL
DEVELOPMENT.

CONTINUING EDUCATION

CONTINUING EDUCATION IS A COMBINATION OF BOTH
FORMAL AND INFORMAL ACTIVITIES.



**Viewing of technical
or professional articles
on the internet.**



**Participating in
mentoring or group
discussions.**



**Reading of technical
or professional
articles.**

ATAINZ Members are required to maintain a high level of Continuing Education. It is the responsibility of ATAINZ Members to select professional development courses and activities that contribute towards their Continuing Education Points. These courses and activities are not restricted to those organised by ATAINZ nor are they restricted to accounting or taxation topics. Courses or activities should assist Members in their continuing Professional Development.

Continuing Education is a combination of both Formal and Informal activities

Informal activities includes such things as:

- Reading of technical or professional articles.
- Viewing of technical or professional articles on the internet.
- Participating in mentoring or group discussions.

Formal activities include such things as attending organised or structured training or courses.

CURRENT ANNUAL CONTINUING EDUCATIONS POINTS REQUIREMENTS

To meet ATAINZ Continuing Education requirements, ATAINZ Members must obtain a minimum of 100 points per calendar year from courses such as:

INFORMAL ACTIVITIES

- Informal Study
- Annual viewing of ATAINZ online Ethics in the Accounting Profession video presentation

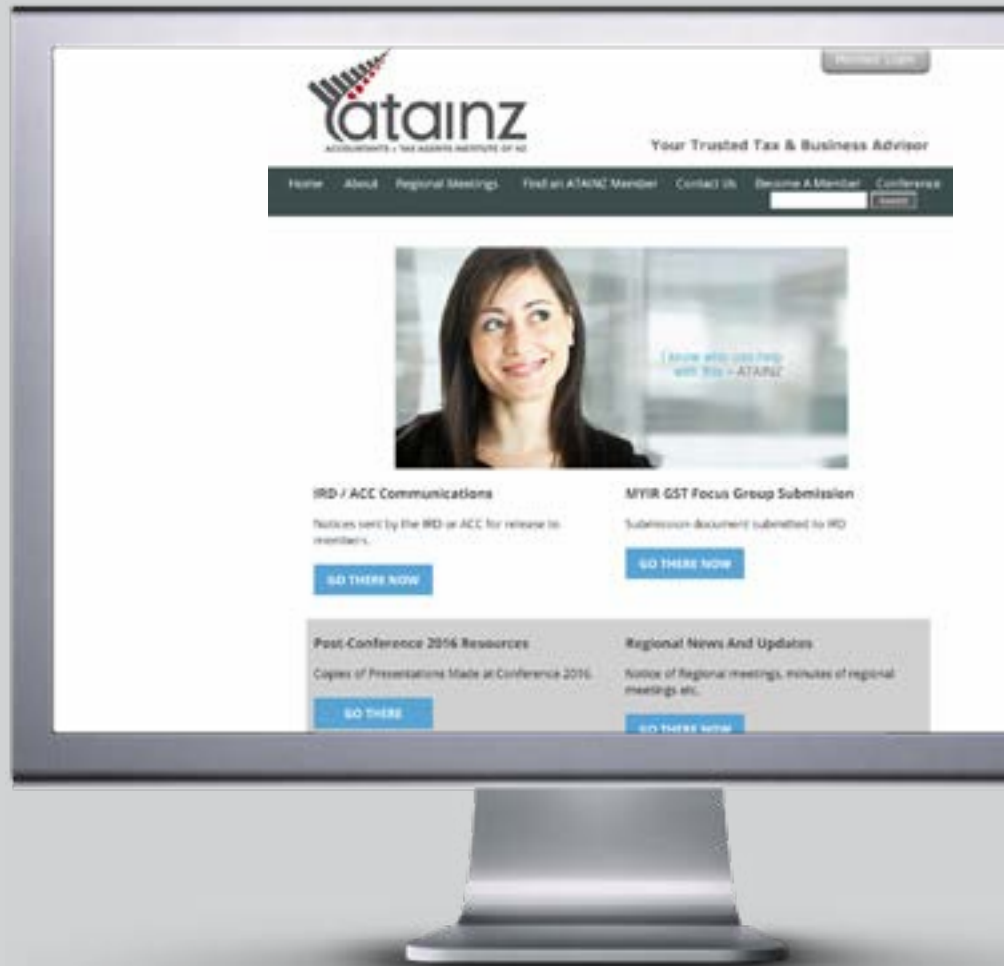
FORMAL ACTIVITIES

- Participation as an ATAINZ Board Member
- Participation as an ATAINZ Regional Coordinator
- Attendance at ATAINZ Conference & AGM
- Attendance at ATAINZ Regional Meetings
- Attendance at ATAINZ Workshops
- Completing a tertiary level tax related paper
- Completing a tertiary level business related paper
- Attendance at Franchise organised training, seminars or courses
- Completing a Full Day Tax or Business related course provided by professional advisor's or Tertiary providers
- Taking part in any industry related webinars
- Attendance at organised Roadshows
- Completing other courses held by organisations such as Toastmasters, ACC, Xero, MYOB, CCH, IR, CAANZ, NZBAI, The Career Academy, etc
- Attendance at other Professional Bodies annual conference.
- Researching and writing technical articles that are published in a journal or on the internet
- Participation as a member of a technical or research committee for a professional body or Government Agency

CONTINUING EDUCATION POINTS AUDITS

All ATAINZ Members will be subjected to random audits as regards their Continuing Education Points. These Audits will require confirmation of attendance at Formal Activities and proof of completion of Informal Activities.

Failure of a Member to obtain the required annual Continuing Education Points (100) may result in their Membership to ATAINZ being suspended or terminated, subject to Board consideration.



MEMBERSHIP RESOURCES

ATAINZ offers its Members a comprehensive range of resources that enables its Members to be at the forefront of current legislative updates and changes.

These include:

- Annual Conference
- One Day Workshops
- Regional Member Meetings
- Training Sessions
- Comprehensive Members Only Website
- Online resources
- Education Library and Video Presentations
- Members Only Facebook Page

**CLICK HERE TO
JOIN TODAY**

CONTACT US

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Your Trusted Tax & Business Advisor
A member of ATAINZ is a trusted advisor,
a pivotal player in the exploration of new ideas,
discovering solutions to critical problems,
illuminating organisational blind spots
and navigating the road ahead.



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