




















# TEO Training Course Resources

List current as at 18 May 2016










Course Material is sorted by year (newest to oldest) then alphabetically within the year.

Title	Description	Year	Course Material			On-Demand Webinar (where applicable)				Available in VIP Area	
			Contents	Hardcopy	Softcopy	Price	Length	Webpage (further info)	Webinar Series	Course Material	Recorded Webinar
<b>Company Distributions</b>	A one stop shop covering all types of distributions from companies	2013		☺	☺	\$200 per user	3 hours	<a href="#">Recording</a>	Recording	✓	
<b>Doing Business in Australia</b>	This essential guide for anyone looking to do business in Australia	2013		☺	✓	\$150 per seat \$300 per connection	2 hours		Webinar	✓	✓
<b>FIFs &amp; Other Foreign Investment Issues</b>	This will explore the wide variety of issues that impact on taxpayers who have investments in foreign entities.	2013		☺	✓	\$200 per seat \$400 per connection	3 hours			✓	
<b>Minimum Financial Reporting Requirements</b>	Webinar presented by Jim Gordon, IRD and Tony Marshall, Crowe Horwath.	2013		✗	✗	\$90 per seat \$230 per connection	1 Hour		Webinar		✓
<b>Mixed Use Assets</b>	Get updated on the new rules and how they apply	2013		✓	✓					✓	
<b>Tax Update 2013</b>	Get ready for the year ahead by revisiting the changes that occurred in the 2012 calendar year. This course will give you the skills and expertise to tackle the various tax changes that have occurred. Registrants to the highlights webinar also receive the Tax Update 2013 course material	2013		☺	✓	\$135 per seat \$270 per connection	1.5 hours		Webinar	✓	✓
<b>Top 10 Legal Issues for Accountants</b>	Looking at the main legal issues accountants encounter as a firm and for their clients	2013		✓	✓	\$90 per seat \$230 per connection	1 hour		Webinar	✓	
<b>Top Tax Issues 2013</b>	Keep up to date with tax changes in the 2013 year.	2013		☺	✓					✓	
<b>Topical Land and Property Taxation</b>	This course covers practical tax issues that are important and of interest to most property investors.	2013		☺	✓	\$200 per seat \$400 per connection	3 hours		Webinar	✓	✓








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<b>Trusts, Joint Ventures, Non-Profit Bodies &amp; Charities</b>	This course material covers common tax issues and pitfalls faced by trusts, joint ventures, non-profit bodies & charities.	2013		👍	✓					✓	
<b>Two for One Taxation</b>	This 2 part course material covers Part 1 – Post-Budget Essentials Tax Update, Part 2 –Practical Tax Issues on the Transfer of Capital Assets	2013		👍	✓					✓	
<b>Year-end Tax Planning</b>	Manage year-end tax planning. Bringing forward deductions and deferring income, provisional tax elections, bad debts, company issues, FBT considerations and more	2013		✗	✗	\$135 per seat \$270 per connection	1.5 hours		Webinar		✓
<b>Amalgamations, Liquidations and Strike offs</b>	The differences between short and long form amalgamation, details of tax relief provisions and scenarios where amalgamation may achieve tax efficient and commercial outcomes not available through other options	2012		✗	✗	\$135 per seat \$270 per connection	1.5 hours		Special Interest Group		✓
<b>Avoidance</b>	The line between tax avoidance and tax planning – common situations, risk areas, cases in review – lessons learnt	2012		✗	✗	\$135 per seat \$270 per connection	1.5 hours		Special Interest Group		✓
<b>Company Tax</b>	This course covers overdrawn current accounts, LTCs, PAYE vs shareholder salaries, amalgamations and subvention payments & more	2012		👍	✓	\$200 per seat \$400 per connection	3 hours		Webinar	✓	✓
<b>Curbing Workplace Bullying and Harassment</b>	Find out how to deal with workplace bullying and harassment. Avoid any health and safety penalties or personal grievance claims that can arise from bullying and harassment allegations.	2012		✗	✗	\$90 per seat \$230 per connection	1 hour		Employ. Law Series		✓
<b>Dealing with Drugs and Alcohol in the Workplace</b>	Drugs, alcohol and work don't mix. Find out how to improve productivity and safety standards by getting rid of the influence at work.	2012		✗	✗	\$90 per seat \$230 per connection	1 hour		Employ. Law Series		✓
<b>Death of a Client</b>	This material will help you prepare for when the inevitable strikes. If a client's affairs are not evaluated on a regular basis and properly structured, then the consequences of their death can be devastating.	2012		✓	✓	\$135 per seat \$270 per connection	1.5 hours		Webinar	✓	✓
<b>Employer Tax Issues</b>	Knowing who is an employee and how remuneration packages are to be treated can be a minefield. Learn the current treatment of employment-related tax	2012		👍	✓	\$200 per seat \$400 per connection	3 hours		Webinar	✓	✓









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<b>Engaging the right kind of employee</b>	Choose the right employment relationship from the outset to avoid holiday pay and personal grievance issues when employment ends.	2012		X	X	\$90 per seat \$230 per connection	1 hour		Employ. Law Series		✓
<b>Factoring Farming into Employment Law</b>	Find out what you need to know when employing staff in a farming environment to make it easy right from the start	2012		X	X	\$90 per seat \$230 per connection	1 hour		Employ. Law Series		✓
<b>FBT/GST</b>	This webinar covers GST Apportionment Rules, GST & Land Transactions and FBT	2012		X	X	\$90 per seat \$230 per connection	1 hour		Webinar		✓
<b>FIF Update &amp; Refresher</b>	Rules generally, options available and things to be aware of.	2012		X	X	\$135 per seat \$270 per connection	1.5 hours		Invest. Tax Series		✓
<b>FIFs &amp; CFCs</b>	This webinar considers the FIF rules generally, but will focus on when the various methods can be used, under what circumstances a change in method can be made & will look at the new rules, comparing those to the existing	2012		X	X	\$135 per seat \$270 per connection	1.5 hours		Webinar		✓
<b>Financial Arrangements</b>	What is a financial arrangement, excepted financial arrangements, cash basis persons, base price adjustments and bad debt issues	2012		X	X	\$135 per seat \$270 per connection	1.5 hours		Invest. Tax Series		✓
<b>Goods and Services Tax (GST)</b>	This course covered the fundamentals of the GST Legislation, then more complex rules and recent legislation developments.	2012		👍	✓					✓	
<b>GST Adjustments</b>	This webinar looks at the old GST adjustment rules and the new apportionment rules, when each applies and the impact of this on decisions to be in or outside the GST net (course material is from GST 2012 course)	2012		👍	✓	\$135 per seat \$270 per connection	1.5 hours		Webinar	✓	✓
<b>Inbound/Migrating Tax Issues</b>	This webinar will help with mainly NZ non-resident tax issues and areas such as transitional residency, permanent residency, permanent establishment issues, DTA impacts, source rules, trust issues and structuring options	2012		X	X	\$135 per seat \$270 per connection	1.5 hours		Invest. Tax Series		✓
<b>Investigating Staff Misconduct &amp; Fraud</b>	Reduce the risk of personal grievances by finding out how to investigate misconduct. Focus on dealing with criminal matters including fraud for you and your clients.	2012		X	X	\$90 per seat \$230 per connection	1 hour		Employ. Law Series		✓
<b>Land Sales</b>	When the sale of land is taxed, deductions and associated persons rules	2012		X	X	\$135 per seat \$270 per connection	1.5 hours		Special Interest Group		✓










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<b>Look Through Companies – Practical Issues</b>	This webinar looks at the practical “how to” of LTCs. The course book is from the 2012 course.	2012		☺	✓	\$135 per seat \$270 per connection	1.5 hours		LTCs Series	✓	
<b>Look Through Companies – Technical Issues</b>	This webinar covers the requirements for an LTC, the taxation treatment and issues. The course book is from the 2012 course.	2012		☺	✓	\$135 per seat \$270 per connection	1.5 hours		LTCs Series	✓	
<b>Look Through Companies (LTCs)</b>	This course will help with the possibilities and pitfalls with properly structuring affairs for you and your clients. You will learn about the updated rules, lessons learnt from 2011 elections and more	2012		☺	✓					✓	
<b>Managing Staff Social Networking</b>	Social networking like Facebook has changed the face of communication, business reputation and productivity. Curb employees from divulging confidential information about your business or making disparaging comments on Facebook. Find out how you can protect your business against legal pitfalls.	2012		✗	✗	\$90 per seat \$230 per connection	1 hour		Employ. Law Series		✓
<b>Managing the Cost of Sick Leave</b>	Get it right from the outset by protecting yourself pre-employment. Find out your legal obligations with sick leave, and your employees’ obligations.	2012		✗	✗	\$90 per seat \$230 per connection	1 hour		Employ. Law Series		✓
<b>PIEs &amp; Financial Arrangements</b>	The webinar considers the issues that arise when investing in Portfolio Investment Entities, how and when a loss can be used. We will also look at Financial Arrangements, work through some Base Price Adjustment scenarios and look at the issues regarding bad debts	2012		✗	✗	\$135 per seat \$270 per connection	1.5 hours		Webinar		✓
<b>Protecting your business from unfair competition</b>	Protect your clients, staff and information by preventing unfair competition through contracts and courts. Understand the tools employers can use to protect their business before relationships go sour. Recognise how employment law helps to prevent and fix damage done to your business.	2012		✗	✗	\$90 per seat \$230 per connection	1 hour		Employ. Law Series		✓
<b>Rural Tax Issues</b>	Get walked through the changes to the livestock valuation rules and what tax planning opportunities exist following 18 August 2011. Plus discover the tax realities and consequences of succession planning in the primary sector	2012		☺	✓					✓	










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<b>Rural Tax Issues</b>	This webinar covers livestock valuation changes – the impact of new rules, tax planning options available and further changes to come, depreciation of farm buildings, stock feed/consumables, PSA/Viroa tax consequences	2012		X	X	\$135 per seat \$270 per connection	1.5 hours		Special Interest Group		✓
<b>Sale and Purchase of Employer's Business</b>	Find out practical employment law information to guide your clients purchasing or selling a business.	2012		X	X	\$90 per seat \$230 per connection	1 hour		Employ. Law Series		✓
<b>Shareholder Continuity</b>	Managing the use of losses and imputation credits can be difficult when there is a change in shareholding.	2012		X	X	\$135 per seat \$270 per connection	1.5 hours		Special Interest Group		✓
<b>Shareholder Salaries &amp; Dividends</b>	Bonus salaries, effects of tax avoidance, dividend issues, tax on dividends, LTCs and salaries/dividends, excessive remuneration, attributed income	2012		X	X	\$135 per seat \$270 per connection	1.5 hours		Special Interest Group		✓
<b>Tax Deductions and Credits</b>	All businesses are entitled to claim expenses in generating taxable income. The tax system also provides tax credits. Learn how to add value for clients by understanding what expenses are deductible, what qualifies for tax credits AND avoid common pitfalls	2012		👍	✓	\$200 per seat \$400 per connection	3 hours		Webinar	✓	✓
<b>Tax issues affecting those in the financial advisory industry</b>	This webinar is suited to IFA members. It covers Financial Arrangements, FIFs and CFCs	2012		X	X	\$135 per seat \$270 per connection	1.5 hours		Invest. Tax Series		
<b>Taxing Trusts</b>	Covers everything you didn't know about taxing trusts! Course includes course paper from 2012 book Trust Refresher.	2012		X	X	\$135 per seat \$270 per connection	1.5 hours		Webinar		✓
<b>Top Tax Issues</b>	This course material covers a broad range of day to day issues for practitioners dealing with the SME market	2012		👍	✓	\$200 per seat \$400 per connection	3 hours		Webinar	✓	✓
<b>Trust Refresher</b>	This material focuses on the benefits of inter vivos trusts without losing sight of their shortcomings/ramifications	2012		👍	✓	\$135 per seat \$270 per connection	1.5 hours		Webinar	✓	✓









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<b>Avoidance</b>	Examines the ever reducing line between planning and avoidance. We will look at some effective but acceptable ways of reducing taxation and will examine some specific avoidance provisions that have arisen from earlier SOT sessions. Finally, we will examine some of the more recent tax avoidance cases, in particular Penny and Hooper.	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 20		✓
<b>Business Structures</b>	When did you last review your client's business structures? It is timely now, considering many recent legislative changes will have impacted on their effectiveness or not.	2011		👍	✓	\$200 per seat \$400 per connection	3 hours		Webinar	✓	✓
<b>Company Tax</b>	Gain critical knowledge, practical solutions and fresh updates to ensure your clients survive and thrive in tough times	2011		👍	✓	\$200 per seat \$400 per connection	3 hours		Webinar	✓	✓
<b>Contractor or Employee</b>	Learn how to select the right relationship with workers to avoid personal grievances by correctly identifying the differences between contractors and employees.	2011		X	X	\$90 per seat \$230 per connection	1 hour		Webinar		✓
<b>Depreciation</b>	What is depreciation? What does it apply to? How is it calculated? How is it recorded in accounts?	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 12		✓
<b>Financial Arrangements</b>	Without proper understanding, financial arrangement can arise from common situations and (if ignored) lead to serious implications for practitioners/taxpayers.	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 15		✓
<b>Fringe Benefits (Part 1)</b>	What is it? Rates, benefits, value vs cost, complete return	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 7		✓
<b>Fringe Benefits (Part 2)</b>	Motor vehicles, work related vehicles, low interest loans	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 8		✓
<b>GST (Part 1)</b>	How is it calculated, how is it returned?	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 10		✓
<b>GST (Part 2)</b>	What is taxable? How are going concerns treated? GST Apportionment rules	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 11		✓
<b>Holidays and Leave</b>	Covers employee entitlement for upcoming Annual and Public Holidays, meet holiday and bereavement leave obligations, implement recent legislative changes and more	2011		X	X	\$90 per seat \$230 per connection	1 hour		Webinar		✓

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<b>Introduction</b>	Tax theory and policy, legislation and regulatory environment	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 1		✓
<b>Land Sales</b>	Land transaction provisions, related land issues and fishhooks to watch out for. Relevant association provisions are summarised too.	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 14		✓
<b>Look Through Companies (LTCs)</b>	Gain an overview of the look-through company regime and highlight some of the issues and areas of complexity in the regime. We will work through some examples to help give you a better understanding of the key components of the regime and where this regime differs from its predecessor.	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 17		✓
<b>LTC &amp; QC Options</b>	Covers finalised changes and is heavily focused on the options for existing LAQCs and QCs including the new Look Through Company "LTC" regime.	2011		👍	✓	\$200 per seat \$400 per connection	3 hours		Webinar	✓	✓
<b>Provisional Tax and RWT</b>	What is it, dates, how it works, applications for interest & dividends	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 9		✓
<b>Repairs and Maintenance</b>	This course seeks to help distinguish whether an item of expenditure is for repairs and maintenance or a capital improvement.	2011		👍	✓					✓	✓
<b>Repairs and Maintenance or Capital?</b>	This webinar seeks to help distinguish whether an item of expenditure is for repairs and maintenance or a capital improvement.	2011		X	X	\$200 per seat \$400 per connection	3 hours		Webinar		✓
<b>Rural Tax Issues</b>	Get updated on both complex and simple tax issues which impact farming clients: discussion on proposed Livestock valuation rule changes, tax avoidance issues arising out of the application of s EC 20, IRD primary sector tax audits: areas of focus & issues	2011		👍	✓					✓	✓
<b>Shareholder Continuity</b>	losses and imputation credits: continuity rules, commonality rules	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 6		✓
<b>Shareholder Salaries and Dividends</b>	This course examines the issues surrounding shareholder salaries and dividends. We will look at some of the fundamental rules and consider the impact of the anti avoidance rules on structuring of shareholder salaries and dividends. The course will be aimed at those with some understanding of the underlying issues and who deal with company accounts on a regular basis.	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 18		✓

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<b>Sole traders, individuals, partnerships &amp; companies</b>	Tax rates, PAYE, contractors, losses, returns, tax rates, imputation credit, dividends	2011		✗	✗	\$90 per seat \$230 per connection	1 hour		School of Tax 5		✓
<b>Source of Income and Residency</b>	Who gets taxed, on what, from where	2011		✗	✗	\$90 per seat \$230 per connection	1 hour		School of Tax 2		✓
<b>Tax on Investment Income</b>	A wide range of investment issues are covered, including FIFs, CFCs, PIES, Financial arrangements and investment in overseas property.	2011		👍	✓	\$200 per seat \$400 per connection	3 hours		Webinar	✓	✓
<b>Top 10 GST/FBT Issues</b>	Learn how to navigate 10 common GST/FBT issues that can cause you uncertainty and costly mistakes for clients	2011		👍	✓	\$200 per seat \$400 per connection	3 hours		Webinar	✓	✓
<b>Top Tax Issues</b>	This course covers current issues ranging from problems with zero rating of land transactions and change of use adjustments under the new GST rules, to the impact of Penny & Hooper and lots in between...	2011		👍	✓					✓	✗
<b>Trading Stock</b>	What is trading stock? How is it valued? How is it treated?	2011		✗	✗	\$90 per seat \$230 per connection	1 hour		School of Tax 13	✗	✓
<b>Trusts</b>	Looks at the taxation treatment of trustee and beneficiary income and the classification of trusts to consider the effect and breadth of the rules surrounding taxation of foreign and non-complying trusts. This course looks at some of the more complex issues that arise in respect of taxation of trusts. This course is designed for those that deal with trusts reasonably often and who are facing issues that rise when trustees or settlors change their taxation residency status	2011		✗	✗	\$90 per seat \$230 per connection	1 hour		School of Tax 16	✗	✓
<b>Trusts and Estates</b>	Review of Trust Law by the Law Commission – Review of Issues Papers; Gift Duty Abolition 1/10/11; Significant court cases	2011		✗	✗	\$90 per seat \$230 per connection	1 hour		Webinar	✗	✓
<b>Trusts Under Siege</b>	This paper covers numerous trust developments you need to be aware of and practical advice on how to meet your obligations when giving advice or managing and administering trusts/estates for clients	2011		👍	✓	\$200 per seat \$400 per connection	2.5 hours		Webinar	✓	✓



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<b>What is deductible?</b>	General permissions, limitations, capital vs revenue	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 4	X	✓
<b>What is income?</b>	Regular receipts, income under tax legislation or ordinary concepts, exclusion for capital receipts	2011		X	X	\$90 per seat \$230 per connection	1 hour		School of Tax 3	X	✓

👉 We do not hold hard copy stock of these items, however we are happy to print and bind a copy for you on request for no additional charge.