PKF Kendons

Business Advisory Services

Smart planning drives successful growth—and we're here to guide you every step of the way. At PKF Kendons, we help businesses thrive with tailored planning, strategy, and expert advice. Whether you need a short-term plan to tackle immediate challenges or a long-term strategy to shape your future, our experienced advisors are ready to support you.

From strategic planning to hands-on workshops, we'll work with you to align your goals with practical steps for growth. And when big decisions feel overwhelming, we'll be your trusted sounding board—offering clear, financial advice to help you move forward with confidence.

Strategic Planning and Business Growth

Provides your business with direction, sets priorities, aligns stakeholders, and optimizes resource allocation.

Key Inclusions:

- Discovery Meeting: Understand client vision, mission, values, and goals.
- Strategic Needs Assessment: SWOT analysis, market position, and current challenges.
- Data Collection: Request historical financials, org charts, industry reports.
- Facilitation Session: Conduct planning workshop with key stakeholders.
- Deliverables Defined: Timeline for strategy plan, KPIs, and review checkpoints.

Managing Reporting and Forecasting

Equip yourself with informed decision-making via structured, timely insights into financial performance.

Key Inclusions:

- Systems Review: Assess accounting software setup (e.g., Xero, MYOB).
- Data Validation: Ensure chart of accounts is consistent and clean.
- Customisation: Design reporting templates tailored to client KPIs.
- Cash Flow Model Setup: Prepare 3–12 month rolling forecasts.
- First Reporting Cycle: Test reporting cadence and finalise monthly reporting structure.

Succession and Exit Planning

Helps owners transition smoothly while maximising business value and ensuring continuity.

Key Inclusions:

- Initial Owner Interview: Discuss goals, timelines, and ideal successors.
- Business Valuation: Conduct formal valuation to assess current worth.
- Gap Analysis: Identify changes needed to maximise value.
- Transition Roadmap: Build a timeline for handover or sale.
- Legal & Tax Review: Coordinate with legal and tax advisors for compliance and structuring.

PKF Kendons Business Advisory Services

Business Structure and Tax Efficiency

Protect your assets, reduce liabilities, and ensures compliance with NZ tax laws.

Key Inclusions:

- Structure Review: Analyse current entities and ownership.
- Tax Position Analysis: Review past returns, identify inefficiencies.
- Asset Protection Review: Assess personal/business risk exposure.
- Structure Recommendations: Outline optimal structure options.
- Implementation Plan: Coordinate restructuring steps with legal and IRD compliance.

Cash Flow and Profit Improvement

Boost the bottom-line performance and financial sustainability of your business.

Key Inclusions:

- Current State Review: Assess current profitability and cash flow cycles.
- Margin Analysis: Review pricing, product/service margins.
- Cost Review: Identify cost-saving opportunities.
- Cash Flow Diagnostic: Build working capital benchmarks and models.
- Improvement Plan: Define quick wins and longer-term initiatives.

Governance and Advisory Boards

Brings structure, accountability, and external expertise to strategic decision-making.

Key Inclusions:

- Governance Needs Review: Determine maturity level and governance gaps.
- Board Charter Setup: Define scope, responsibilities, and cadence.
- Recruitment Support: Assist in identifying board members or advisors.
- Meeting Framework Design: Define reporting pack content and meeting flow.
- Board Induction: Hold inaugural meeting and align on board expectations.

www.pkfkendons. co.nz 04 566 4399

Contact us today to book a free consultation