

Kia Ora there,

Wow - 2022 was quite the year, eh! I hope you have done everything you need to do and are looking forward to a well-earned break with your loved ones.

We have just delivered our last big update for the year - Standalone Checks. So people who just want to do a Biometric or Electronic IDV, or a PEP Check, can do them in 2Shakes.

That both helps existing customers and opens up the app to be used by lots more possible customers across a variety of sectors.

And importantly it provides a platform for stage 1 of our next big update - Australian ID Verification in the 2Shakes app. That is task one for 2023 and is the first part of making 2Shakes a trans-Tasman onboarding compliance platform. Exciting stuff - and see **Becoming a Shareholder** below if you'd like to be an even bigger part of that expansion!

So check out our news below, and join us for a look back at 2022:

- Standalone Checks
- Becoming a Shareholder
- 2022 in review
- Mandatory 2FA from March 2023
- Christmas support info



*Ngā mihi o te Kirihimete me te Tau Hou.*

*Season's greetings for Christmas and the New Year.*

## **Standalone Checks Released**

We have finished off 2022 by delivering a major update that allows Standalone IDV and PEP checks to be done in the app.

You can get to them in 2Shakes from **AML>Standalone Checks** or click straight through to **Standalone Checks** from the **Dashboard**.

# Become a Shareholder

A wee while back we asked for expressions of interest to become a shareholder and get 2Shares in 2Shakes 😊.

As we mentioned above, from the start of next year we are 100% focused on adding Australian IDVs to the platform, and from there adding Australian company lookups and signup/authority to act flows. That will be a staged expansion into Australia, and we are looking to raise capital to accelerate that expansion, and to list on the NZX.

Getting an investment memorandum document complete and signed off is much more work that you'd think - but we are nearly there!

As before we need to stress **this is not an offer** - it's an expression of interest, which will help us prepare the offer. If you are interested, please click the button below and let us know, thanks!

[Register Your Interest](#)

## 2022 in Review

Is it a year already since our last review? We have been so focused helping keep businesses like yours growing and staying compliant the year has just flown by.

We got straight into 2022 with a well-attended free webinar on Ongoing CDD and reminded everyone that agreement renewals at the same time can help grow your business and ensure you're billing appropriately.

The sad events in eastern Europe then dominated, with the Russian Sanctions Act a grim reminder of the need for PEP/Sanctions checks not just for AML (we always include them with Electronic & Biometric IDV).

The granting of an exemption for some IRD Tax Transfers meant a reduction in the compliance requirements for many in the Accounting Sector. Alongside that though a new IRD Operational Statement on Authority to Act clarified the need for ID Verification, at least for the people giving authority. That all led to lots of tweaks and changes in 2Shakes too!

We briefly came up for air, then dived into a major update of Agreement Renewals / Ongoing CDD and had great feedback on that.

And just to round off the year we built an entirely new way to access and use 2Shakes in our Standalone Checks – useful for existing and new customers, many of whom would not otherwise have easy and cost-effective access to ID and PEP checks.

And it's not just the updates you see in the app - it's all the things we do in the background to make sure your onboarding and AML compliance is easy for you and your clients. That included changes as part of being a Xero-Connected App, and the NZBN moving from version 3 to version 4. During our annual review last week, we listed over 25 medium to large updates we did this year - that's huge! It's fair to say we took a moment to let what we have accomplished as a team sink in. And that team includes you - many of the improvements we made would not have been possible without your feedback, suggestions and help - so thanks heaps!



**Happy kowhai trees at Bookkeepercon22 meeting their new owners and looking forward to going to their forever homes 🌲 .**

2022 did see a partial return of Conferences we could attend, but Covid still impacted on that front. We did manage to get to the delayed Small Business Accounting (SBA) Conference and give an update on all things Onboarding, AML and Compliance.

And we had a blast as ever at Bookkeepercon22 at the new Te Pae in Christchurch - and managed to give away 150 kowhai trees, because...well because trees! With climate change, land slips and coastal erosion, we need trees more than ever. As all 2Shakes customers know - the best paper form is a tree!

Let's hope 2023 includes many more opportunities to meet up and catch up 😊 .



The SBA Conference participants helped me transition from video calls to do some in-person emoji feedback as we went 🤗 👍 😞.

## Mandatory 2FA from 1st March 2023

Most of you will already be familiar with two factor authentication (2FA), and Xero users know it has been mandatory there for a while.

2FA is currently optional in 2Shakes, and in use with many of our customers. It is easy to use with the standard Google Authenticator app.

In line with our industry partners, and to continue to ensure the highest levels of security and privacy of client information, **we will be making 2FA mandatory from 1st March 2023.**

From that date when you next log into 2Shakes you will be asked to configure 2FA.

You can get ahead of the change by going to the **Hi** menu anytime, and selecting and setting [Configure Two Factor Authentication](#).

## 2Shakes Christmas hours

The team will be taking a well-earned break from close of business Wednesday 21st December through to Monday 9th January. During this period, we will have reduced support staff operating. You can still email us on [support@2shakes.co.nz](mailto:support@2shakes.co.nz).

## 2Tips

- **Are you logging in to the 2Shakes-Centrix Portal to do PEP checks or ad hoc IDVs?**

Now you can use Standalone Checks directly in the 2Shakes app. You can get to them in 2Shakes from AML>Standalone Checks or click straight through to Standalone Checks from the Dashboard.

- **Spend time with loved ones and be kind to each other**

Final tip for the year: we've all had a few big and stressful years in a row, so

we hope you take time over the summer to spend quality time with friends and family, be kind to each other, and look after your physical and mental health.

That's a gift to yourself and others you can give all year round.

As always, if there's anything we can help with please reach out to the support team at [support@2shakes.co.nz](mailto:support@2shakes.co.nz) or use our [Contact page](#).

Thanks very much for all your support, and please have a safe and happy holiday,

Ngā mihi nui,

The 2Shakes Team



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W: [www.2shakes.co.nz](http://www.2shakes.co.nz)

### **Client Onboarding Automation | AML Due Diligence.**

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