

SELF ASSESSMENT APPLICATION

The cost of a **SELF ASSESSMENT INSPECTION** is \$300 + GST for residential properties only. If you have a commercial or industrial property, please contact us for an obligation free quote.

ATDS Tax Depreciation Schedules are written based on the Diminishing Value Method, which highlights the depreciation of both the Plant and Equipment and Section 43 Capital Works.

Your report will contain the following information:

- ✓ A method statement
- ✓ Details derived from the client completed checklist
- ✓ A summary and detailed information for both methods of depreciation (prime cost and diminishing value)
- ✓ Low-value and low cost pooling legislation is used to accelerate deductions under the diminishing value method for all plant and equipment assets.
- ✓ Valid for the ATO specified life of the property – 40 years
- ✓ Graphical representation of yearly and cumulative claims
- ✓ Signed certification of the report by a qualified Quantity Surveyor



RE: Tax Depreciation Schedule for an investment property:

1. *Name of the property owner:*
2. *Address of the investment property:*
3. *Age of the property:*
4. *Details of any renovations (If yes, provide details on page 5):* Yes No
5. *Is the property furnished? (If yes, provide details on page 5):* Yes No
6. *A copy of the strata plan attached if available:* Yes No
7. *A copy of the floor plans attached if available:* Yes No
8. *Purchase price: \$*
9. *Build cost (if known - plus any additional items): \$*
10. *Legal costs associated with the purchase: \$*
11. *Stamp duty costs: \$*
12. *Date of exchange:*
13. *Date of settlement:*
14. *Date of first lease or schedule start date (if schedule is required to be back dated):*
15. *Your residential address:*
16. *Phone Number (h):*
17. *Email:*
(please provide your email address, as all reports are emailed)
18. *Phone Number (w):*
19. *Mobile Number:*

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Self Assessment Application - \$300 + GST

How did you hear about A.T.D.S (select one):

- **Word of mouth:** Referred by Accountant / Real estate agent / Family member / Friend / Colleague / Developer (please circle)
- **Online using search engine:** Google / Yahoo / Sensis / MSN / Windows Live / Yellow Pages online / Link from another website (please circle)
- **Traditional Media:** Yellow Pages book / Newspaper article / Magazine article / Brochure / Radio (please circle)

Our fees to carry out the schedule are listed below:

Self Assessment Application

To carry out the above services, our fee would be: \$300.00 plus \$30.00 GST, totalling \$330.00 GST Inclusive.

Please complete the above form and forward to our Head Office via:

Email: info@austtaxonline.com.au

Post: via address below

National Headquarters

Level 29, Chifley Tower
2 Chifley Square
Sydney NSW 2000

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Property Type

Please select the closest match for the type of property:

Property Type: House | Unit | Townhouse | Villa | Serviced Apartment |
Holiday House | Chalet | Granny Flat | Other If other please specify:

Age of the property:

What is the approximate age of the property from the time it was completed up to today's date, eg. 6 years old?

Is the property part of a complex?

Please estimate the total number of units/villas/townhouses in the complex:

Number of units/villas/townhouses in the complex:

This can be found by looking at the number of mailboxes at the front of the complex (exclude the mailbox for the strata/building manager)

Please estimate the number of floors in the entire building:

Total number of floors:

Standard/Quality of Construction

Please select the most appropriate method of construction for the building:

Construction method (*select one*): Double brick cavity Weatherboard cladding
Brick Veneer Prefabricated Home

Please estimate the construction standard

Construction Standard (*select one*)

- Basic** - Standard fitout and finish
- Medium** - A grade above the basic level of finish. May include better quality of appliances, floor finishes, etc
- High** - A grade above Medium, includes for high quality appliances, floor finishes, superior materials used
- Prestige** - Highest level of fitout and finish. Includes for high- end appliances, floor finishes, sanitary ware, fixtures and fitments

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Renovation

Details of renovations and improvements:

List here any renovations carried out by yourself since you have owned the property or that you may think have been carried out since 27th February 1992 by previous owners. If possible list the year of the renovation and your best estimate of likely cost. A typical response may be as follows:

- *Repainted unit in 2002 – cost \$2,600*
- *New carpet in 2001 – cost \$2,150*
- *New light fittings – cost \$650*
- *Tiled balcony by previous owner – Cost unknown / date unknown – maybe 6 years old*

Furnishings

List of furniture items and fittings (inventory list):

Your managing agent should have a copy of this, which will be signed by your tenants upon acceptance of the lease agreement. Also provide approximate costs of the items (if known). If the cost is unknown please provide a reasonable estimate.

An example would be:

- *Beds: \$1,800*
- *Microwave: \$285*
- *Cutlery: \$95*

Furniture includes items that are supplied by the landlord, are removable and do not form part of the building.

Items such as dishwashers, ovens, cooktops, blinds, etc are fixed in place and considered part of the building.

****For extensive lists of renovations and/or furnishings please compile an excel spreadsheet and attach separately to this application form.***

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Property description

Please specify which rooms are included with the property:

Number of bedrooms:

Number of bathrooms:

(Ensuite also counts as a bathroom)

Number of kitchens:

Number of lounge rooms:

Number of dining rooms:

Number of laundries:

Any other rooms:

Please specify in detail:

Other

Number of car spaces/undercover parking:

Number of garages:

Covered pergola:

(Please specify any other items that may affect the cost of construction eg. sloping site, poor foundations, difficult access, etc)

Building Services

Please select the building services applicable to your investment property:

Hydraulic Services (Plumbing, Draining and Gas Fitting)

Hot water service (select one): Gas Electric Solar

Are there any pumps on the property eg: rainwater tank, stormwater detention tank, septic tank?

Pumps: Yes No

Number of Pumps:

Ducted Gas Heating: Yes No

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Mechanical Services (Air-conditioning)

Ducted Air-conditioning: Yes No

Split system air-conditioning: Yes No

Number of split air-conditioning systems:

Room/window mounted air-conditioning units: Yes No

Number of room/window mounted air-conditioning units:

Electrical Services (Electrical, Data & Communications)

Intercom: Yes No

What type of intercom (select one): Video Audio

Ducted Vacuum System: Yes No

Burglar alarm/security system: Yes No

Access control systems: Yes No

Closed Circuit Television Systems: Yes No

Television antennas – freestanding: Yes No

Ceilings fans: Yes No

Number of ceilings fans:

Fire Services

Hydrant booster pump: Yes No

Fire alarm – bell: Yes No

Fire indicator panel (FIP): Yes No

Emergency warden intercom speakers (EWIS): Yes No

Fire hose reels & nozzles: Yes No

Fire alarm - heat/smoke: Yes No

Detectors: Yes No

Fire extinguishers: Yes No

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Kitchen appliances

Please identify the building services applicable to your investment property:

Type of benchtop (select one): Granite Reconstituted Stone Laminate Timber
Other

If Other please specify:

Cooktop: Yes No

Select cooktop type (select one): Gas Electric Ceramic

Underbench/wall oven: Yes No

Upright stove: Yes No

Rangehood: Yes No

Dishwasher: Yes No

Electric water filter: Yes No

Garbage disposal unit (insinkerator): Yes No

Bedrooms

Please indicate if the following assets are applicable to the bedrooms in your property:

Built in wardrobes: Yes No

(This includes incorporating doors, fixed fittings and mirrors)

*Any other comments:

Bathroom/Ensuite Assets

Please indicate if the following assets are applicable to the bathrooms in property:

Accessories, freestanding: Yes No

(Including shower caddies, soap holders, toilet brushes)

Shower curtains: Yes No

Exhaust fans: Yes No

Spa bath: Yes No

Heated towel rails: Yes No

*Any other comments:

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Laundry Assets

Please identify if the following assets are included in your investment property:

Washing machine: Yes No

Electric clothes dryer: Yes No

Floor finishes

Please indicate if the following floor finishing's are included in your investment property:

Carpet: Yes No

Specify which rooms are carpeted:

Vinyl: Yes No

Specify which rooms have vinyl:

Prefinished/Floating timber floors: Yes No

Specify which rooms have pre-finished/floating flooring:

Tiles: Yes No

Specify which rooms have floor tiles:

Timber – Polished: Yes No

Specify which rooms have timber floors:

(Timber floors form part of the capital works allowances and are not treated as individual items of plant and equipment.)

Window coverings

Please indicate if the following window coverings are included in your investment property:

Property has blinds to windows: Yes No

Type of blinds installed (select one): Fabric Verticals Metal Venetians Timber Verticals

Block Out Screens Roller Blinds

Specify which rooms have blinds:

Property has curtains to windows: Yes No

Type of curtains installed (select one): Lace Premade Curtains Custom Made Curtains

Specify which rooms have curtains:

Any other comments:

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External equipment

Please indicate if the following external equipment is included in your investment property:

Tennis court: Yes No

Material on the tennis court (select one): Artificial grass Concrete – painted Clay
Other

Please specify:

Swimming pool: Yes No

Method of heating (select one): Solar Gas Electric Not Heated

Spa: Yes No

(The term spa refers to an outdoor spa perhaps adjacent a pool and not spa bath)

Method of heating (select one) Solar Gas Electric Not Heated

Sauna: Yes No

Common BBQ area: Yes No

Motorised pergola louvers: Yes No

Motorised window shutters: Yes No

Solar garden lights: Yes No

Free-standing shed: Yes No

Approximate shed size:

Motorised garage door/boom gate: Yes No

Automatic irrigation system: Yes No

(Includes garden watering installations - control panels, pumps, timing devices)

Solar powered generating system: Yes No

(please include size (kw) and cost after rebate if known) KW:

Cost after Rebate:

Please indicate if your property has any of the following common property assets (only applicable to villas, townhouse, units or apartments)

Common area property

Gym: Yes No

Cardiovascular equipment (select one): 0 1 2 3 4 5 6 7 8+
(Cardiovascular equipment includes exercise bikes, treadmills, rowing machines etc.)

Resistance equipment (select one): 0 1 2 3 4 5 6 7 8+
(Resistance equipment refers to freestanding weight machines)

Elevators (select one): 0 1 2 3 4 5 6 7 8+

Garbage chute Yes No

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Attachments

Additional files to be attached? Yes No

(You can send furniture lists, floor plans, photos. All of these items help with creating your tax depreciation schedule.)

Please review checklist and ensure the details you entered are correct and as accurate as possible. Your Tax Depreciation estimate will be based on the information provided on this checklist.

Payment Terms & Client Authorisation

Payment for your depreciation schedule must be made upfront and before the report can be released. Please continue to the Credit Card Authorisation form on page 12 to make payment via credit card. Alternatively payment can be made upon receipt of your invoice via B-Pay, Direct Deposit, Money Order or Cheque.

To complete your application process, please sign the client authorisation on page 13 and forward the forms to our head office as per the request detailed on page 3 of this application form.

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CLIENT'S PHONE NUMBER:

CLIENT'S INVESTMENT PROPERTY ADDRESS:

Client Authorisation

Should you wish to proceed, please sign below, confirming your acceptance of the terms and conditions as listed on www.austtaxonline.com.au and email or post it to our office

Email: info@austtaxonline.com.au

Assuring you our best attention at all times.

Total Invoice Amount inc GST: \$

Credit Card Type – please tick

Master Card: Visa Card:

Credit Card Number:

Expiry Date:

/

Credit Card Verification Number:

What is a Card Verification Number (CVN)? This is a 3 digit code that provides extra security for online payments. For Visa, MasterCard and Diners, this is the last 3 digits on the back of the signature panel.

Name on Card:

Authorisation Signature:

Australian Tax Depreciation Services Pty Limited

abn | 28 105 828 448

email | info@austtaxonline.com.au

P: 1300 557 342

www.austtaxonline.com.au

Office USE ONLY

Date Received:/...../.....

Time Received:

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Client Authorisation

Should you wish to proceed, please sign below, confirming your acceptance of the terms and conditions and email or post it to our office with pages 1 – 13.

Assuring you our best attention at all times.

AUTHORISATION

I/We the undersigned hereby accept the fees and hereby authorise Australian Tax Depreciation Services to locate construction documents, make all necessary enquiries and to access the property as required to complete the Tax Depreciation Schedule.

.....
Signed & Accepted by:

Date

Thank you for completing our **SELF ASSESSMENT APPLICATION** form.

For fastest turn around time, please **submit your forms** to our head office via email or fax:

EMAIL

info@austtaxonline.com.au

PHONE

1300 557 342

Forms can also be submitted by post to :

National Headquarters

Level 29, Chifley Tower
2 Chifley Square
Sydney, NSW 2000

Once we have received your forms, you will be sent a confirmation SMS.

For more information or to talk to an expert please give us a call.

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