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Economy Package - Self Assessment

The provision of a Tax Depreciation Schedule Report based on the diminishing value method which highlights the depreciation of both the Plant and Equipment and Section 43 Capital Works.

This report incorporates the following information:

- ✓ A method statement
- ✓ The details derived from the self assessment application form.
- ✓ A summary of the Diminishing Value method of Depreciation.
- ✓ A detailed assessment of Plant & Equipment to be depreciated, including a 10 yr forecast for the Diminishing Value method of Depreciation.
- ✓ Graphical representation of yearly claims and cumulative claims.
- ✓ Signed certification of the report.

Our Guarantee

If we cannot claim a higher amount of depreciation than three times our fee in your first full calendar year - we will not charge for our services!

Please fill out and return the attached questionnaire to get started.

SELF ASSESSMENT

\$250 + GST

How to: to complete these forms simply click the grey box and type your response.

1. Your Details

Full Name of Owner(s):

Full name of the owners as it appears on the Contract of Sale.

Postal Address:

Suburb:

State or Territory:

Postcode:

This is your residential address, for future correspondence.

Phone (h):

Mobile:

Email:

Please provide your contact details, for future correspondence.

2. Investment Property Details

Investment Property Address:

State or Territory:

Postcode:

Type of Property (Eg. Unit, Home, Townhouse, Villa, Duplex etc):

Age of the property:

Purchase Price:

Legal Costs:

Stamp duty costs:

Building Costs (if known):

Age of the property is the approximate age from the tie it was completed to today's date, eg. 10 years old. Purchase price is the amount stated within the contract. Legal costs are conveyancing fees associated with your purchase. Stamp duty is the stamp duty payable to the Office of State Revenue. Building cost is the construction cost including architectural fees, engineering fees etc.

3. Key Dates

Date of exchange:

This is the date that the contract for the property was signed.

Date of settlement:

This is the date that you took ownership of the property.

Date of first lease/Schedule start date:

This is the date the property was/will be first available for rent. Your schedule will start from this date.

4. Building Details

Type of Construction (Eg. Brick veneer, full brick, weatherboard, mud brick etc):

Standard of Finish (Eg. Basic, Good, High, Luxury):

Look at items such as appliances, kitchens, bathrooms and integral finishes. Are they basic, good quality or luxury items?

Number of floors in the building:

Is the building part of a complex? Yes No

Number of Units/Villas/Townhouses in the complex:

Describe the size of the building. Number of storeys is how many levels are in the entire building. i.e. In the house or the entire unit block.

5. Renovations (if none, go to section 6)

Details of renovations and improvements:

Renovations carried by yourself or that you think have been completed since 27 Feb 1992 - (if possible - include dates and your best estimate of likely costs. A typical response may be as follows:

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

6. Furnishings (if none go to section 7)

Is the property furnished? Please provide a list of items (use separate page if required):

Provide a 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 brands and approximate costs of the items (if known). Furnished items refer to items such as TV's, lounge suites, cutlery, crockery etc

7. Strata Plan – for properties within a complex only

Do you have a copy of the Strata Plan? Yes No (if yes please attached separately)

This is applicable to units, townhouses, villas, commercial and industrial sites only. The strata plan is a document highlighting your particular entitlement amongst the entire development. It also has a layout of your particular property.

8. Optional Extra's

Would you like a copy of the report mailed to you?

You will receive a colour bound copy of your report. This incurs an additional cost of \$15.00 +GST for printing and postage. All reports are sent via email free of charge.

9. General Information

How did you hear about myDepreciation.com.au?

Any further comments or information deemed relevant.

Additional Comments:

Almost done!

Please continue to the following pages for the property checklist. To complete this checklist you will need a more extensive knowledge of the details of your investment property.

PROPERTY CHECKLIST

Please select the services applicable to your property for each section.

1. Property Description – please advise the number of each type of room

ROOM TYPE	NUMBER OF ROOMS
Bedroom(s):	
Lounge Room(s):	
Family/Rumpus Room(s):	
Dining Room(s):	
Kitchen(s):	
Laundry(s):	
Bathroom(s):	
Ensuite(s):	
Walk in robe(s):	
Garage(s):	
Basement Parking:	
Carport(s):	
Veranda(s):	
External Pergola(s):	

Any other rooms? Yes No
 Please specify in detail:

Be sure to indicate the number of rooms for each type of room listed. If none, indicate with a 0 or n/a.

2. Hydraulic Services (Plumbing Drainage and Gas-Fitting)

Hot water service (select one): Gas Electric Solar

Are there any pumps on the property? Yes No

Please specify in detail:

Number of pumps:

Ducted Gas Heating: Yes No

3. Air-conditioning

Ducted air-conditioning: Yes No

Split System Air-conditioning: Yes No

Number of Split System Air-conditioners:

Room/Window Mounted Air-conditioning: Yes No

Number of Room/Window Mounted Air-conditioners:

4. Security

Intercom:
What type of intercom? Yes No

Is the intercom audio or video enabled? Also list the brand if available.

Ducted Vacuum System: Yes No

Burglar/Alarm System: Yes No

Access Control System: Yes No

Does your property have a system which restricts the ability to access the property? i.e using or entering the property.

5. Fire Services

Hydrant booster pump: Yes No

Fire Alarm – Bell:
Number of Fire alarm bells: Yes No

Fire indicator panel (FIP): Yes No

Emergency warden intercom speakers: Yes No

Fire hose reels & nozzles: Yes No

Fire alarm – heat/smoke: Yes No

Fire Extinguishers:
Number of Fire Extinguishers: Yes No

Smoke Detectors:
Number of Smoke Detectors: Yes No

6. Electrical Services

Closed Circuit Television System (CCTV): Yes No

Television Antennas - Freestanding: Yes No

Telephones:
Number of telephones: Yes No

Ceiling Fans:
Number of ceiling fans: Yes No

Light Fittings:
Number of light fittings: Yes No

7. Bedroom Accessories

Built in wardrobes: Yes No
 Number of built in wardrobes:

Be sure to specify the number of built in wardrobes in your property and which bedrooms they are located in. EG. Master bedroom – 1 wardrobe – double door, Spare bedroom – 1 wardrobe – walk in.

8. Kitchen

Type of Bench top: Granite Reconstituted Stone Laminate Timber Other
 If other please specify:

Cooktop: Yes No Brand:
 Type of Cooktop (gas/electric/ceramic):

Underbench wall/oven: Yes No Brand:

Upright Stove: Yes No Brand:

Rangehood: Yes No Brand:

Dishwasher: Yes No Brand:

Electric Water Filter: Yes No Brand:

Garbage disposal (insinkerator): Yes No Brand:

Please be sure to specify the brand of each appliance if known.

9. Bathroom/Ensuite Accessories

Accessories freestanding: Yes No
 Detail of freestanding accessories:

This includes items such as shower caddies, soap holders, toilet brushes etc.

Shower curtains: Yes No

Exhaust Fans: Yes No

Stand alone exhaust fans as well as exhaust fans including combined lighting and heating.

Spa Bath: Yes No

Heated towel rails: Yes No

Any other comments

10. Laundry

Washing Machine: Yes No Brand: _____

Electric Clothes Dryer: Yes No Brand: _____

11. Window Coverings

Property has blinds to windows: Yes No

Type of blinds installed: Fabric Verticals Metal Venetians Block Out Screens
 Timber Verticals Roller Blinds

Specify which rooms have blinds: _____

Property has curtains to windows: Yes No

Type of blinds installed: Lace Premade Curtains Custom Made Curtains

Specify which rooms have blinds: _____

11. Floor Finishes

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 timber floors: _____

Tiles: Yes No
 Specify which rooms have tiles: _____

Timber - polished: Yes No
 Specify which rooms have timber floors: _____

Solid timber floors are treated as part of the capital works allowance and are not treated as individual items of plant and equipment.

12. External Equipment

Tennis Court: Yes No
 Material on the tennis court: _____

Swimming Pool: Yes No
 Method of heating: _____

Spa: Yes No
 Method of heating: _____

Here, the term spa refers to an outdoor spa, often found adjacent to a pool, and NOT a spa bath.

- Sauna: Yes No
- Common BBQ area: Yes No
- Freestanding shed:
Approximate size of shed: Yes No
- Automatic Irrigation System: Yes No

Includes garden watering installations – control panels, pumps, timing devices etc.

- Solar Garden Lights: Yes No
- Motorised garage door/boom gate: Yes No
- Motorised pergola louvers: Yes No
- Motorised window shutters: Yes No

13. Common Area – for units/villas/townhouses only

- Gym: Yes No
- Cardiovascular Equipment: None 1 2 3 4 5 6 7 8 9 10+

Cardiovascular equipment includes exercise bikes treadmills, rowing machines etc.

- Resistance Equipment: None 1 2 3 4 5 6 7 8 9 10+

Resistance equipment refers to freestanding weight machines

- Elevators: None 1 2 3 4 5 6 7 8 9 10+
- Garbage Chute: Yes No

14. Attachments

- Additional files to be attached: Yes No

You can send furniture lists, floor plans, photos. All of these items will help with getting the most out of your tax depreciation schedule.

You're finished!

Please review your checklist and ensure that the details provided are correct and as accurate as possible as your tax depreciation schedule will be based on the information provided on this checklist. You can then continue to the following pages to complete the authorisation forms.

CREDIT CARD AUTHORISATION

Client Phone Number:

Client Investment Property Address:

Total Invoice Amount (inc GST):

Job Number:

1. Fee Proposal

A professional fee of \$250 + GST is applicable to this tax depreciation proposal, subject to the above noted information being provided by the owner.

2. Credit Card Details

Card Type: MasterCard: Visa:

Name on Card:

Card Number:

Expiry Date: /

CVN:

Print Name & Authorized Signature:

Print Name

Signature X _____

CLIENT AUTHORISATION

1. Authorisation

By submitting this form, you are confirming your acceptance of the terms and conditions as listed on www.mydepreciation.com.au and authorise myDepreciation to locate construction documents, make all necessary enquiries as requested to complete the Tax Depreciation Schedule.

Should you wish to proceed, please sign below and email, fax or post this authorisation to our office with your application form.

Print Name _____

Signature X _____

Thank you for completing our Economy Package application forms. You may submit them via email, fax or post using the contact details provided.

Please note that you will receive a confirmation SMS from MyDepreciation once your forms have been received.

For more information or to talk to an expert call us on: 1300 319 809

EMAIL: info@mydepreciation.com.au

FAX: 1300 558 231

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