

Appendix A – Application Forms  
Fees are located on page 6

Complete pages 5,11 & 13-20

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## austriantaxdepreciationservices

Sydney | Melbourne | Brisbane | Adelaide | Perth | Canberra | Darwin | Hobart

### 15 Reasons why you will be glad that you chose Australian Tax Depreciation Services to carry out you Depreciation Schedule ...

1. Owned and managed by **Yenktesh Reddy**, a leading advisor in the area of Tax Depreciation including guest appearances on **Sky Business Report** with **David Koch**, **The Sun Herald** - Investor Section, **moneymanager.com.au** & **The Australian Newspaper – Wealth Section**.
2. Our clients include some of Australia's elite – the **wealthy** and the **famous!**
3. **ATO** compliant reports.
4. Simple form for engagement of services – **1 page form**
5. Available **24 hours a day – 7 days a week**.
6. Helpful, courteous staff.
7. All reports are signed off by a **Director**.
8. Our fee is **100% tax Deductible**.
9. Our schedule is **transferable** to new owners if the property is sold.
10. Our schedules last for **40 years** (new properties).
11. **Written Guarantee of services**.
12. **Australia Wide Service** for all of your properties.
13. Reports can be **back dated** to the date of first lease.
14. **Flexible** payment options
15. We will **beat any competitors** comparable written quotation.

### Our Guarantee

If we cannot claim a higher amount of depreciation than twice our fee in your first full year– we will not charge you for our services.



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# Components of Our Service

### Components of the Tax Depreciation Service we will provide include the following:

- q A site investigation of the property. This is imperative and allows our firm to undertake measurements and compile photographic records to ensure that all items within the property and the surrounding common areas are quantified and valued, hence allowing us to maximise your potential return
  
- q Prompt, reliable and accurate service at all times. We endeavour to have all reports completed within 14 working days after the engagement of our services. Our staff will liaise with both yourself, the managing agent and the tenant to ensure that access into the property is provided as soon as physically possible. Furthermore, we operate seven (7) days a week for convenience, allowing us to access properties on any given day that is suitable to your tenant. We are also available seven (7) days a week to answer any queries that you may have
  
- q The provision of a Tax Depreciation Schedule Report based on the Diminishing Value Method, which highlights the depreciation of both the Plant & Equipment and Section 43 Capital Works. This report incorporates the following information:
  - ü A method statement
  - ü The date and details derived from our site investigation
  - ü A summary of the Diminishing Value method of Depreciation
  - ü A detailed assessment of Plant & Equipment to be depreciated, including a 10 year forecast for the Diminishing Value method of depreciation
  - ü Graphical representation of yearly claims and cumulative claims
  - ü Signed certification of the report
  - ü Site Photographs

Further to the above, our fee also includes for all queries relating to the reports by either yourself, your accountant, or the Australian Taxation Office (ATO). It also includes for minor updates to your reports over the course of the next 10 years, pending that there are no “major” significant changes to the taxation laws or to the structural fabric of the depreciable property in question.

Our fees are structured to reflect the building type, the volume of reports we undertake within the specified building/development and the depth of analysis required. Australian Tax Depreciation Services deals with clients all areas Australia wide and our specialty lies in the preparation of Tax Depreciation Schedules.

Since Tax Depreciation Schedules are the foundation of our business, we are keen to maximise the volume of reports undertaken at any given moment. We are one of the very few firms that solely produce Tax Depreciation Schedules. Hence, with the large volume of schedules produced yearly, we are able to offer the most competitive rates available. Our philosophy is simple. We want your business and therefore we challenge you to find any other firm capable of providing the above services for the same or discounted fee. **We guarantee to beat any competitors' comparable written quotation.**

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## Non – Site Inspection Option

Conditions applicable to our engagement is that our Total Fixed Fee stated above is to be paid immediately from the invoice date (the invoice will be submitted after you have sent the application forms) and that there are no significant changes to the terms of reference for the abovementioned tasks.

**Please note that our fee is fully inclusive. It therefore covers all costs associated with the report including all disbursements expended to undertake the abovementioned tasks. You will not be charged for items such as photocopying, travel expenses, enquiry fees, postage, etc.**

**Furthermore, note that all fees associated with the preparation of a Tax Depreciation Schedule are fully tax deductible.**

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**RE: Tax Depreciation Schedule for a residential property located at (Enter suburb)  
(Enter state) for (enter name)**

**In order to carry out your depreciation schedule, could you please provide the following details.**

**Description of the property (circle one) :** Unit / House / Townhouse / Villa / Commercial / Industrial

1. Name of the property owner: .....
2. Address of the investment property: .....
3. Age of the property: .....
4. Details of any renovations carried out (use separate page if required):.....
5. Is the property furnished? Please provide a list of items (use separate page if required):.....
6. A copy of the strata plan (if available). This has details of your strata entitlement: .....
7. Floor plans if available.....
8. Purchase price: \$ .....
9. Legal costs associated with the purchase: \$ .....
10. Stamp duty costs: \$ .....
11. Date of exchange: .....
12. Date of settlement: .....
13. Date of first lease (if not settlement date) or schedule start date (if schedule is required to be back dated): .....
14. Your residential address:: .....
15. Phone Number (h): .....
16. Email: .....  
please provide your email address, as all reports are emailed
17. Phone Number (w): .....
18. Mobile Number: .....
19. Fax Number: .....
20. Accountants Details (Name & number): .....
21. Would you like a copy of your report mailed to you. This incurs an additional cost of \$15.00 (plus GST) for printing and postage.. You will receive a colour bound copy of your report. **Yes 0 No 0**
22. Would you like a Residex Comparative Market Analysis Report at an additional cost of \$30.00 (plus GST). You will receive a emailed copy of your Residex report – which includes a price estimate for your property along with demographic information, comparable sales in the area, and predicted future economic factors.  
**Yes 0 No 0**
23. Would you like ATDS to call you to advise you about additional products and services that we offer including:
  - A). Pre purchase pest and building inspection reports with free current market appraisals. **Yes 0 No 0**
  - B). Home loan and investment property loan reviews. **Yes 0 No 0**
  - C). Buyers agent services (assisting you with your next property purchase). **Yes 0 No 0**
  - D). Insurance replacement cost valuations. **Yes 0 No 0**

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# Non – Site Inspection Option

**How did you hear about A.T.D.S (circle 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:**

## Option 2 – No Site Visit

To carry out the above services, our fee would be: **\$350.00 plus \$35.00 GST, totalling \$385.00 GST Inclusive.** Client to supply photographs and/ or floor plans and to answer questionnaire.

**Please complete the above form and fax it to our Head Office on:**

**1300 558 231** or

**Email it to : [info@austtaxonline.com.au](mailto:info@austtaxonline.com.au)**

**or post it to:**

### **Sydney**

Level 29, Chifley Tower  
2 Chifley Square  
Sydney NSW 2000

### **Melbourne**

Level 40,  
140 William Street  
Melbourne VIC 3000

### **Brisbane**

Level 24, AMP Place  
10 Eagle Street  
Brisbane QLD 4000

### **Perth**

Level 28, AMP Tower  
140 St Georges Terrace  
Perth WA 6000

### **Adelaide**

Level 24, Westpac House  
91 King William Street  
Adelaide SA 5000

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## Appendix B – A Guide to Completing Forms

# A Guide to Completing Forms

**Name of the property owner:** This should be the name as it appears on the Contract of Sale.

**Address of the investment property:** This is obviously the address of the property you are wishing to have the depreciation schedule carried out on.

**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.

**Details of any renovations carried out:** 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. If possible list the year of the renovation and your best estimate of likely cost. Our consultants will value them on site. Use a separate page if required. 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

**Is the property furnished:** 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 approximate costs of the items (if known).

**A copy of the strata plan:** This is applicable to units, townhouses, villas, commercial and industrial suites only. The strata plan is a document highlighting your particular entitlement amongst the entire development. It also has a layout of your particular property. This is not necessary if you require us to inspect the property.

**Floor plans:** If available, please include floor plans. This is not necessary if you require us to inspect the property.

**Purchase Price:** This is the amount stated within the contract. For commercial and industrial properties, the amount stated should be GST exclusive.

**Stamp Duty Costs:** This is the amount of stamp duty payable to the Office of State Revenue. This is for reporting purposes only. Your accountant will deal with this amount separately.

**Legal Costs associated with the purchase:** This is the amount for conveyancing fees associated with your purchase. This is for reporting purposes only. Your accountant will deal with this amount separately.

**Date of Exchange:** This is the date that contracts were exchanged.

**Date of Settlement:** This is the date that the property settled and you took ownership of it.

**Date of first lease:** If the property was bought as an investment property and it was available for rent from the date of settlement, then the date of first lease would be the same as the date of settlement.

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## Non – Site Inspection Option

If you lived in the property for a few years prior to renting it out, then the date of first lease would be the date that the property became available for rent (i.e. you signed an agency agreement or you advertised it for rent).

If you require your schedule top be back dated, please insert the date that you would like the schedule to commence. Remember, this date must be the date at which the property was available for rent.

**Your Residential Address:** This should be the address where you currently reside (not your investment property address).

**Phone Number (h):** Please include your phone number so we may contact you should we have any queries.

**Email:** Please include your email – this is how your report is delivered.

**Phone Number (w):** Please include your phone number so we may contact you should we have any queries.

**Phone Number (m):** Please include your phone number so we may contact you should we have any queries.

**Facsimile Number (f):** Please include your fax number so we may contact you should we have any queries. If you would like us to call you before we send a fax please state this on the form.

**Accountant's Details:** Please include your accountant's details so we can answer any queries that they may have with ease and liase with them directly if required.



**Australian Tax Depreciation Services**  
staff are proud members of the  
Australian Institute of  
Quantity Surveyors

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## Appendix C – Client Authorisation

# Client Authorisation

We thank you for the opportunity to submit our Fee Proposal and trust that we have interpreted your instructions correctly. However, please do not hesitate to contact the undersigned should you have any queries regarding this submission.

**Should you wish to proceed, please sign below, confirming your acceptance of the attached terms and conditions and fax it, email or post it to our office with Appendix A, C & D (page 5, 11, 13-20).**

Assuring you our best attention at all times.

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### 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.

Yours Sincerely

**Yenktesh Reddy**

.....  
Yenktesh Reddy  
Director

.....  
Enter name

*Please note that you will be sent via email / fax or post formal confirmation receipt of your application form should you wish to proceed.*

## Appendix D – Non Inspection Checklist

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Name of the Property Owner:.....

Address of the investment property:.....

Property Type

Please select the closest match for the type of property

Property Type (please circle): House, Unit, Townhouse, Villa, Serviced Apartment, Holiday House, Chalet, Granny Flat

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.....

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## Standard/Quality of Construction

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

Construction method (*please circle*): Double brick cavity, Weatherboard cladding, Brick Veneer, Prefabricated Home

Please estimate the construction standard

Construction Standard (*please circle*)

- **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

## Renovation

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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*

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**Property description**

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**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 carspaces/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**

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Please select the building services applicable to your investment property

**Hydraulic Services (Plumbing, Drainage & Gas-fitting)**

Hot water service (please circle) Gas, Electric, Solar

Are there any pumps on the property such as pumps for a rainwater tank, stormwater detention tank, septic tank?

Pumps (please circle) Yes, No

Number of Pumps.....

Ducted Gas Heating (please circle) Yes, No

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**Mechanical Services (Air-conditioning)**

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Ducted Air-conditioning (please circle) Yes, No

Split system air-conditioning (please circle) Yes, No

Number of split air-conditioning systems .....

Room/window mounted air-conditioning units (please circle) Yes, No

Number of room/window mounted air-conditioning units.....

**Electrical Services (Electrical, Data & Communications)**

---

Intercom (please circle) Yes, No

What type of intercom (please circle) Video, Audio

Ducted Vacuum System (please circle) Yes, No

Burglar alarm/security system (please circle) Yes, No

Access control systems (please circle) Yes, No

Closed Circuit Television Systems (please circle) Yes, No

Television antennas - freestanding (please circle) Yes, No

Ceilings fans (please circle) Yes, No

Number of ceilings fans .....

**Fire Services**

---

Hydrant booster pump (please circle) Yes, No

Fire alarm – bell (please circle) Yes, No

Fire indicator panel (FIP) (please circle) Yes, No

Emergency warden intercom speakers (EWIS) (please circle) Yes, No

Fire hose reels & nozzles (please circle) Yes, No

Fire alarm - heat/smoke (please circle) Yes, No

Detectors (please circle) Yes, No

Fire extinguishers (please circle) Yes, No

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## Kitchen appliances

---

Please identify the building services applicable to your investment property

Type of benchtop (please circle) Granite, Reconstituted Stone, Laminate, Timber, Other

If Other please specify.....

Cooktop (please circle) Yes, No

Select cooktop type (please circle) Gas, Electric, Ceramic

Underbench/wall oven (please circle) Yes, No

Upright stove (please circle) Yes, No

Rangehood (please circle) Yes, No

Dishwasher (please circle) Yes, No

Electric water filter (please circle) Yes, No

Garbage disposal unit (insinkerator) (please circle) Yes, No

## Bedrooms

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Please identify if following assets are applicable to the bedrooms in your investment property

Built in wardrobes (please circle) Yes, No

*This includes incorporating doors, fixed fittings and mirrors*

\*Any other comments.....  
.....

## Bathroom/Ensuite Assets

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Please identify if following assets are applicable to the bathrooms in your investment property

Accessories, freestanding (please circle) Yes, No

*including shower caddies, soap holders, toilet brushes*

Shower curtains (please circle) Yes, No

Exhaust fans (please circle) Yes, No

*including lighting/heating*

Spa bath (please circle) Yes, No

Heated towel rails (please circle) Yes, No

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Any other comments .....  
.....

## Floor finishes

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Carpet (please circle) Yes, No  
Specify which rooms are carpeted .....

Vinyl (please circle) Yes, No  
Specify which rooms have vinyl .....

Prefinished/Floating timber floors (please circle) Yes, No  
Specify which rooms have pre-finished/floating flooring .....

Tiles (please circle) Yes, No  
Specify which rooms have floor tiles .....

Timber – Polished (please circle) 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

---

Property has blinds to windows (please circle) Yes, No

Type of blinds installed (please circle) Fabric Verticals, Metal Venetians, Timber Verticals, Block Out Screens, Roller Blinds

Specify which rooms have blinds .....

Property has curtains to windows (please circle) Yes, No

Type of curtains installed (please circle) Lace, Premade Curtains, Custom Made Curtains

Specify which rooms have curtains .....

Any other comments .....

## Laundry Assets

---

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

Washing machine (please circle) Yes, No  
Electric clothes dryer (please circle) Yes, No

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## External equipment

---

Tennis court (please circle) Yes, No

Material on the tennis court (please circle) Artificial grass, Concrete – painted, Clay, Other Please specify .....

Swimming pool (please circle) Yes, No

Method of heating (please circle) Solar, Gas, Electric, Not Heated

Spa (please circle) Yes, No

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

Method of heating (please circle) Solar, Gas, Electric, Not Heated

Sauna (please circle) Yes, No

Common BBQ area (please circle) Yes, No

Motorised pergola louveres (please circle) Yes, No

Motorised window shutters (please circle) Yes, No

Solar garden lights (please circle) Yes, No

Free-standing shed (please circle) Yes, No

Approximate shed size .....

Motorised garage door/boom gate (please circle) Yes, No

Automatic irrigation system (please circle) Yes, No

*Includes garden watering installations - control panels, pumps, timing devices*

## Common area property

---

Common Property assets are only applicable to villas, townhouse, units or apartments.

Gym (please circle) Yes, No

Cardiovascular equipment (please circle) None, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10

*Cardiovascular equipment includes exercise bikes, treadmills, rowing machines etc.*

Resistance equipment (please circle) None, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10

*Resistance equipment refers to freestanding weight machines*

Elevators (please circle) None, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10

Garbage chute (please circle) Yes, No

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**Furniture**

Is the property going to be furnished for the tenant? (please circle) Yes, No

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 for 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.*

**Attachments**

Additional files to be attached? (please circle) 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.

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