

Appendix A – Application Forms

Fees are located on page 6

Complete pages 5 & 11

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

Site Inspection Option

**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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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 fee includes for a site visit, which is to be arranged through the following Agent (Property Manager):

Agent	
Contact	
Phone	
Facsimile	
Email	
Address	

Our fees to carry out the schedule are listed below:

Option 1 – Site Visit

To carry out the above services, our fee would be: **\$450.00 plus \$45.00 GST, totalling \$495.00 GST Inclusive.**

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

1300 558 231 or

Email it to : 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.

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 (page 5 & 11).

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.

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.