



**For Office Use only:**

Mail Merge Client Number \_\_\_\_\_

Days Yr 1 \_\_\_\_\_

Price \$350.00

## Client Information (Economiser)

Owner of Property:

Joint Ownership

If Yes, others owners names:

If two or more owners, is the property owned as "Joint Tenants":

or "Tenants in Common":

*\*Note most common form of ownership is "Joint Tenants"*

If Tenants in Common, please show percentage of each ownership share: eg: Bill 60%, Mary 40%.

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Postal Address:

Contact Number: (h)

(w)

(m)

Email address:

Investment Property Address:

Settlement Date:

Date Property became available for rent:

Would you like a hard copy of your depreciation report mailed to you?

Mailing of the report incurs an addition cost of \$15.00 for printing and postage.

I am happy to receive occasional emails from Write It Off regarding news, special offers and updates?

Office use only. Do not complete

	Standard Email Sent (with CAF)	/ / 2019
	Client Authority Form Received	/ / 2019
	Invoice Sent	/ / 2019
	Receipt of Payment	/ / 2019
	Report Sent to Client	/ / 2019

Are you the first and original owner of the property?

Was your property purchased or contracted to be purchased on or before \*9/5/17?

## Self Assessment Worksheet

What type of property do you have?

How big is your property?

\*Purchased or contract to be purchased on or before 9/5/17: Following the May 2017 budget announcement, Residential Investment Property Owners can no longer claim for plant and equipment installed by previous owners of the property. If there has been a previous owner to the property then then you can only claim plant and equipment you have installed as well as the original construction cost of building post 16/9/87 and any capital works improvements done by any owner.

### **Some helpful instructions to assist in completing the Economiser Worksheet:**

**This form is designed to be filled out and completed on your computer and saved progressively as you work your way through. It is not really designed to be printed first and then completed by hand as the available options in the fields will not be available.**

When measuring a room for **floor coverings** say 3 metres by 4 metres then we need you to write down 12 square metres in the appropriate box. Obviously you would have to do this for each room and add them together to give us your total answer for each type of floor covering.

When measuring **window furnishings** measure the width of the window say 1.8metres and then tell us if this is a quarter size window, a half window or a full window that nearly covers the wall from floor to ceiling.

You can only include **kitchen assets, laundry or furniture** that you actually own and that you have provided for the tenants use. i.e: you cannot include the clothes dryer in your list if there is one in the property but is owned by the tenant.

There is also a section (on page 7) available for you to type in the costs & dates for **assets you have purchased** since you owned the property instead of providing us with the measurements and description. Please use this section if applicable to you and it may save you some time.

### **Very Important:**

Near the end of this worksheet, we ask you about renovations / upgrades (what we call Capital Works Items) to the property. If you do not know the cost or date of any renovations, you cannot include it in your worksheet. If you know of any renovations that you do not know the cost and date of and you would like to have included in your report, you should consider using our Premium package and have one of building inspectors assess the size of your renovation claim. Examples: kitchen upgrade, bathroom upgrade, extensions, pergolas, paving, retaining walls etc etc. Having these included could add considerable value to your claim.

# Section 1

## Plants and Articles (Inclusions)

What sort of heating / cooling does it have                      Quantity

Floor coverings                      Quantity in Sqm                      Condition

Note: Measure each room and add all the same rooms together.  
Eg: Bedroom One: 3m x 4m = 12 sq metres plus  
Bedroom Two: 3.5m x 3.6m = 12.6 sq metres. Total 24.6 sq metres.  
Polished Wood, Slate and Concrete floors cannot be included in this section but if upgraded since original construction of property and if cost & date known they can be included in Renovation / Capital Works section below.

# Window Furnishings

## Blinds:

Type	Width in metres	Length
		Full Length > 1500mm
		Full Length > 1500mm
		Half Length > 500mm, <1500mm
		Half Length > 500mm, <1500mm
		Quarter Length < 500mm Quarter
		Length < 500mm

## Curtains:

Type	Width in metres	Length
		Full Length > 1500mm
		Full Length > 1500mm
		Half Length > 500mm, <1500mm
		Half Length > 500mm, <1500mm
		Quarter Length < 500mm Quarter
		Length < 500mm

Outdoor Blinds	Width in metres	Length
		Full Length > 1500mm
		Full Length > 1500mm
		Half Length > 500mm, < 1500mm
		Half Length > 500mm, < 1500mm

Uj cf g"Uckls	Total SQM or Dimensions
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Notes: Measure all the like window furnishing across the width of the window and add them together

## Kitchen Appliances

Microwave	Brand	Built-in	Convection			
Dishwasher	Brand					
Cooktop	Brand	Gas	Electric	Flat / Ceran	Induction	No. of Burners
Oven	Brand	Width				
Stove	Brand	Gas	Electric	Flat / Ceran	Induction	No. of Burners
Rangehood	Brand	Type	Extra Wide (900mm)			
Refridgerator	Brand	Size in Litres	Single or Double Doors			

## Laundry Appliances

Washing Machine	Brand	How Many Kgs	Top or Front Loader
Clothes Dryer			

## Outdoor Assets

Hot Water System	Size (Litres)	Type	If Solar does it have booster	What size is the booster
			If Instantaneous what Size	

## Sprinkler / Irrigation Systems

Automatic watering controls and timers

\* Please note only include the control devices here not the actual sprinklers or sprinkler pipe. The latter has to be included in Renovations / Capital Works section below if applicable.

## Garage Assets

Automatic Door Opener	Single Door	Double Door
Number of Motors		
Number of Remotes		

\*Only include automatic garage door motors here not manual doors.

## Other Depreciable Assets

	Quantity
Ceiling Fans	
Ceiling Fans with light	
Door Closers	
Door Stops	
Doorbell	
Ducted Vacuuming	
Exhaust Fans	
Exhaust Fans with light	
Heated Towel Rails	
J km"J qo g Hub"	
Insinkerator	
Intercom System (usually only in units or apartments)	
IXL Tastics 3 globe	
IXL Tastics 5 globe	
Lights - Protruding (Inside)	
Lights - Protruding (Outside)	
Recessed Lights (total inside and out)	
Security System	
Shower Curtains	
Smoke Detectors (Battery)	
Smoke Detectors (Hardwired)	
Solar Lights	
Solar Panel (how many or specify kilowatts)	
Spa Bath Pumps	
Swimming Pool	
- Cleaner	
- Heater	
Tennis Court	
Water Pumps	
Water Filter System	
Weather Strips	

List of Assets you have purchased since taking ownership:

### Furniture

We are happy to include furniture into your depreciation schedule. If the property is furnished, you will need to provide a separate list with the furniture and its value and date of purchase. Please provide separately or type below.

## Section 2

### Common Property

This section is only relevant to units and townhouse complexes where there may be common area assets that are depreciable.

How many units in the entire complex	
How many floors including basements in the entire complex	
Is there:	
Swimming Pool (Y/N)	
Spa (Y/N)	
Sauna (Y/N)	
Tennis Court (Y/N)	
BBQ's (How many)	
Camera System (Y/N)	
Elevators / Lifts (How many)	
Fire Equipment (Y/N)	
- Indicator Panel & Emergency Warning System (Y/N)	
No of outside lights in complex	
No of lights in the basement	
Underground Parking. No of roller doors	
How many remotes for carpark access	
How many swipe cards for carpark access	
Gymnasium (Y/N)	
No of cardiovascular type equipment	
No of weight machines / benches	
No of multi station weight machines	
Carpet	
Square metres of carpet in corridor	
How many units in the corridor	

## Section 3

### Renovations / Capital Works

Renovations are usually major changes made to the original property that form part of the property but is not an inclusion. Eg: updating the kitchen cupboards is a renovation but putting in a new oven is not a renovation and should be made part of the inclusions. In this section we need what was done, when it was done (month & year) and how much it cost. If you do not have receipts or proof of works carried out or details of the renovation works from the council you cannot include it as part of your worksheet. In this instance it may be advisable for you to opt for the Premium Package Option where we conduct an on-site inspection (by one of our qualified building inspectors) of your property and provide an estimate of the renovation works carried out so it can be claimed in your depreciation report.

Listed are some of the common changes made to properties but if there are others please add.

Pergola	Date	Cost



Renovations cont:

Deck	Date	Cost

Security Screens	Date	Cost

Paving	Date	Cost

Kitchen Upgrade	Date	Cost

Bathroom Upgrade	Date	Cost

Plumbing Upgrade	Date	Cost

Electrical Upgrade	Date	Cost

Fencing	Date	Cost

Retaining Walls	Date	Cost

Extension	Date	Cost

Hard Landscaping Eg: paving, compacted gravel, stones, mowing strips	Date	Cost

Other (Please Specify)	Date	Cost

Other (Please Specify)	Date	Cost

Other (Please Specify)	Date	Cost

## Section 4

### Construction Cost.

You need to provide us with the original date of construction of your property.

- If property was built before 18<sup>th</sup> July 1985 then you do not need to complete this section. Just answer 'Yes' to the first question and move onto 'Photos'
- Construction Cost: **You do not have to provide this information**, it is only if you know it and obtained your information from an authorised source such as council or builder. This is the cost to build your property – it does not include land value, stamp duty, legal fees or bank interest charges. If your property was built prior to 1985, the construction cost is not required.
- Contract Price: This is the cost to build your property – it does not include land value, stamp duty, legal fees or bank interest charges. This information will only be required if you have contracted a builder to build the property for you. Please provide a copy of the inclusions list and note that a copy of the Builders Contract may be required to ensure the accuracy of the depreciation schedule.
- A floorplan with measurements would be helpful with the total number of square metres of the building (including attached garages, porch, balconies and alfresco areas).
- **At the very least we need a year of construction & a total number of square metres**

Pre 18 <sup>th</sup> July 1985 Property. (Yes or No)	
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If you answered Yes above skip this section and move onto Photos

Date of Construction:	
<i>Note: You must at least give us a year of construction</i>	
Construction Cost* (This is not purchase price. It is building cost of the dwelling. If you don't know it, leave blank) \$	Where have you obtained the Construction Cost from? (Please tick or specify) a. Local council b. Builders contract c. Other, please specify _____
If you selected Builders Contract or Other, did the construction cost given include all the fixtures and fittings of the property? (Yes / No)	
Please list and provide costs for the fixtures and fittings were excluded from the construction cost and that you paid for separately. Eg: blinds \$1850, Carpet \$4500	

Number of square metres of your property (floor area)
Purchase price of the property (including house & land): \$

**Very Important: Have you either given us the construction cost of the property, a floorplan with measurements or the total number of square metres of the building. You must give us at least one out of these 3 in order for us to complete the depreciation schedule.**

**Photos.** This is optional for you but may help us in assessing the values to add into your report. A photo that takes in each room, front of house and backyard assets would be helpful.

**Floorplan of your property.** If you have a floorplan with dimensions and overall square metres of the dwelling please provide.

**Other information** that you think we should know that you want to tell us about. Eg: you may have the exact cost for some assets listed above that you have installed and need to tell us about or something that is unique about your property.