



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

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

Price \$350.00

## Client Information (Economiser)

**Owner of Property:**

**Joint Ownership**    Yes:        No:        **If Yes**, others owners names:

**If two or more owners, is the property owned as? Joint Tenants:**        or    **Tenants in Common:**

*\*Please tick the box which applies to you, leave blank if neither*

*\*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:**

Please provide at least one        (h)        (w)        (m)

**Email address:**

**Investment Property Address:**

**Settlement Date:**

**Date Property became available for rent:**

**Purchase Price:**

**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.*

Yes:        No:

**Are you the first and original owner of the property?**

Yes:        No:

Office use only. Do not complete

	Standard Email Sent (with CAF)	/ / 2020
	Client Authority Form Received	/ / 2020
	Invoice Sent	/ / 2020
	Receipt of Payment	/ / 2020
	Report Sent to Client	/ / 2020

# 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

## Construction Cost

**If property was built before 16th September 1987 then you do not need to complete this section. Just answer 'Yes' to the first question and move onto the next section.**

**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 16<sup>th</sup> Sept 1987 Property:** Yes:            No:

\*If you answered **Yes** above skip this section

**Date of Construction:**

\*Note: You must at least give us a year of construction

**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?**

If **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):**

**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.**

# Section 2

## 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
	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
	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

- Full Length > 1500mm
- Full Length > 1500mm
- Half Length > 500mm, <1500mm
- Half Length > 500mm, <1500mm

## Shade Sails

Total SQM or Dimensions

*Notes: Measure all the like window furnishing across the width of the window and add them together*

## Kitchen Appliances

### Microwave

**Brand**

**Built-in** Yes: No:

**Convection** Yes: No:

### Dishwasher

**Brand**

### Cooktop

**Brand**

**Gas** Yes: No:

**Electric** Yes: No:

**Flat / Ceran** Yes: No:

**Induction** Yes:

No:

**No. of Burners**

### Oven

**Brand**

**Width**

### Stove

**Brand**

**Gas** Yes: No:

**Electric** Yes: No:

**Flat / Ceran** Yes: No:

**Induction** Yes:

No:

**No. of Burners**

### Rangehood

**Brand**

**Type**

**Extra Wide (900mm)** Yes: No:

### Refridgerator

**Brand**

**Size in Litres**

**Single or Double Doors**

## Laundry Appliances

### Washing Machine

**Brand**

**How Many Kgs**

**Top or Front Loader**

**Clothes Dryer** Yes: No:

# Outdoor Assets

## Hot Water System

**Size (Litres)**

**Type**

**If Instantaneous what Size**

**If Solar does it have booster?**

Yes:

No:

**What size is the booster?**

## Sprinkler / Irrigation Systems

**Automatic watering controls and timers**

Yes:

No:

*\* 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**

**Number of Motors**

**Number of Remotes**

**Double Door**

**Number of Motors**

**Number of Remotes**

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

# Other Depreciable Assets

## Ceiling Fans

### Ceiling Fans with light

## Door Closers

## Door Stops

**Doorbell** Yes: No:

**Video Intercom** Yes: No:

**Ducted Vacuuming** Yes: No:

## Exhaust Fans

### Exhaust Fans with light

## Heated Towel Rails

**Hills Home Hub** Yes: No:

**Insinkerator** Yes: No:

**Intercom System** (usually only in units or apartments) Yes: No:

**NBN Box** Yes: No:

## IXL Tastics 3 globe

## IXL Tastics 5 globe

## Lights - Protruding (Inside)

## Lights – Protruding (Outside)

## Recessed Lights (total inside and out)

**Security System** Yes: No:

## Smoke Detectors (Battery)

## Smoke Detectors (Hardwired)

## Solar Panel (how many or specify kilowatts)

**Spa Bath Pumps** Yes: No:

**Swimming Pool** Yes: No:

**-Heater** Yes: No:

**-Cleaner** Yes: No:

**-Blanket** Yes: No:

**Tennis Court** Yes: No:

## Water Pumps

**Water Filter System** Yes: No:

## 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 3

### 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?**

**Swimming Pool**

**Spa**

**Sauna**

**Tennis Court**

**BBQ's (How Many)**

**Camera System**

**Elevator / Lifts (How Many)**

**Fire Equipment**

**- Indicator Panel & Emergency Warning System**

**Are there sprinklers in your unit?**

**Automatic Entry Doors**

**Lights**

**Number of outside lights in complex**

**Number of lights in the basement**

**Underground Parking**

**Number of roller doors**

**How many remotes for carpark access**

**How many swipe cards for carpark access**

**Gymnasium**

**Number of cardiovascular type equipment**

**Number of weight machines / benches**

**Number of multi-station weight machines**

**Carpet**

**Square metres of carpet in corridor**

**How many units in the corridor**

## Section 4

### 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.

<b>Pergola</b>	
<b>Date</b>	<b>Cost</b>
<b>Deck</b>	
<b>Date</b>	<b>Cost</b>
<b>Security Screens</b>	
<b>Date</b>	<b>Cost</b>
<b>Paving</b>	
<b>Date</b>	<b>Cost</b>
<b>Kitchen Upgrade</b>	
<b>Date</b>	<b>Cost</b>
<b>Bathroom Upgrade</b>	
<b>Date</b>	<b>Cost</b>
<b>Ensuite Upgrade</b>	
<b>Date</b>	<b>Cost</b>
<b>Electrical Upgrade</b>	
<b>Date</b>	<b>Cost</b>
<b>Fencing</b>	
<b>Date</b>	<b>Cost</b>
<b>Retaining Wall</b>	
<b>Date</b>	<b>Cost</b>
<b>Extension</b>	
<b>Date</b>	<b>Cost</b>
<b>Hard Landscaping</b>	
<b>Date</b>	<b>Cost</b>
<b>Built-in Wardrobes</b>	
<b>Date</b>	<b>Cost</b>
<b>Tiling</b>	
<b>Date</b>	<b>Cost</b>

**Roller Shutters**

<b>Date</b>	<b>Cost</b>
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**Plantation Shutters**

<b>Date</b>	<b>Cost</b>
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**Built-in Sheds**

<b>Date</b>	<b>Cost</b>
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**Other**

<b>Date</b>	<b>Cost</b>
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**Other**

<b>Date</b>	<b>Cost</b>
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## Section 5

### Additional Information

**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.** Anything that you think we should know, 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.

# Digital Signature

## **By signing this document you are confirming:**

You agree to pay the fee as outlined at the top of this document within 7 days of us notifying you via email that your report has been completed and invoice has been attached.

That the information you have provided is true and accurate to the best of your ability. This document has been completed in good faith in line with the personal self assessment rules as outlined by the Australian Taxation Office. You are wholly responsible for accuracy of the information provided in this document.

**Sign Here:**