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The TaxShield Checklist is a helpful tool designed to assist you in creating your own depreciation schedule, in conjunction with Urban Consulting Pty Ltd and the innovative TaxShield system.

Print this document and conduct a simple inspection of your property, noting the number or size of all items present.

TaxShield relies on the accuracy of the information you provide. Under the ATO's self-assessment rules, you are responsible for the lodgement of an accurate tax return. TaxShield provides the framework and professional support for you to create your own comprehensive depreciation schedule comfortably and easily. Estimated or average costs will be provided for all items of unknown value. You will have the option to enter your own values for these items upon lodgement into TaxShield. Please remember that the final schedule will be based on the information provided and responsibility will rest on you as the taxpayer.

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## INSTRUCTIONS

To complete the self-inspection, simply measure the number, size, or area of each item as specified.

Items marked 'no.' (eg Air Conditioning - split system) should be counted individually.

Items marked 'm2' (eg Air conditioning - centrally ducted) should be measured as an area.

Items marked 'item' (eg lift) should be counted as '1' if present, or left blank if not present.

If an item was purchased separately to the property itself you will need to provide the date of purchase and the price you paid for the item. For example, you may have purchased a clothes dryer 5 days after settlement, in which case you would need to enter the date and price as shown on the tax invoice you have retained for that item.

Taxation laws clearly explain that those items purchased separately to a property must be claimed at their actual cost, and receipts must be presented in the case of an audit.

## TaxShield Client & Property Information Required

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### Property Information

Property Address: \_\_\_\_\_

Suburb: \_\_\_\_\_

Postcode: \_\_\_\_\_

Settlement Date: \_\_\_\_\_

Acquisition / Contract Date: \_\_\_\_\_

### Total Capital Expenditure

Purchase Price: \$ \_\_\_\_\_

Stamp Duty: \$ \_\_\_\_\_

Legal Fees: \$ \_\_\_\_\_

Conveyancing: \$ \_\_\_\_\_

Unimproved Land Value: \$ \_\_\_\_\_ (refer rates notice, Valuer General, council)

### Client Information

First Name: \_\_\_\_\_

Surname: \_\_\_\_\_

Address: \_\_\_\_\_

Home Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Mobile Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

## TaxShield Client & Property Information Required

### Construction Cost

Building Type (tick one):

- Detached House - Modern
- Detached House - Old
- Townhouse
- Unit - High Rise (one or more lifts)
- Unit - Low Rise (no lifts)

Construction Completion Date: \_\_\_\_\_

Construction Start Date: \_\_\_\_\_

Construction Cost (if known): \_\_\_\_\_

If Construction Cost UNKNOWN, state Floor Area: \_\_\_\_\_ (m2)

### Credit Card Details

Card Type: \_\_\_\_\_ (VISA, MasterCard, AMEX, Bankcard)

Card Number: \_\_\_\_\_

Expiry Date: \_\_\_\_\_

Name on Card: \_\_\_\_\_

Card Security No.: \_\_\_\_\_

(Last Three numbers on the back of the card for Visa, Mastercard, Bankcard)

(Small number on front of card for American Express)

I hereby advise and acknowledge that the above information is current, accurate and complete in it's entirety.

\_\_\_\_\_  
Signature of Property Owner

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

General Assets	QTY	Unit	Cost (if known)	Date (if not settlement)
Air Conditioning - centrally ducted		item		
Air Conditioning - Split system		no.		
Air Conditioning - Packaged unit		no.		
Air Conditioning - Room unit		no.		
Ceiling fan		no.		
Door closer - automatic (shared in complex)		no.		
Door closer - surface mounted		no.		
Escalators (shared in complex)		item		
Carpet floor coverings		m2		
Timber floating floor		m2		
Linoleum		m2		
Vinyl floor coverings		m2		
Furniture - freestanding		item		
Garbage bins		no.		
Garbage compacting systems		no.		
Generators		no.		
Gym Equipment - cardiovascular (shared in complex)		item		
Gym Equipment - resistance (shared in complex)		item		
Electrical hand dryers		no.		
Heaters - electric		no.		
Heaters - gas		no.		
Heaters - other		no.		
Heaters - freestanding		no.		
Hot water unit - electric		no.		
Hot water unit - gas		no.		
Hot water unit - solar		no.		
Lift		item		

General Assets	QTY	Unit	Cost (if known)	Date (if not settlement)
Lamps - Floor Mounted, Freestanding		no.		
Lamps - Table, Freestanding		no.		
Linen		item		
Master antenna television MATV (shared in complex)		item		
Mirrors - free standing		no.		
Radios		no.		
Rugs		no.		
Stereo system		no.		
Surround sound system		no.		
Cordless phone		no.		
PABX (shared in complex)		no.		
Telephone handset		no.		
Television antennas - freestanding		item		
Television sets		no.		
Vacumaid		item		
Vacuum cleaners - portable		no.		
Ventilation fans		no.		
Video cassette recorder systems (VCR)		no.		
Blinds		item		
Curtains		item		

Bathroom Assets	QTY	Unit	Cost (if known)	Date (if not settlement)
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Exhaust fans		no.		
Heated towel rails		no.		
Shower curtains		no.		
Spa bath pump		no.		

Fire Control Assets	QTY	Unit	Cost (if known)	Date (if not settlement)
Fire evacuation speaker and bells		item		
Smoke detector		no.		
Fire break glass alarm		item		
Fire indicator panel (shared in complex)		item		
Fire extinguisher		item		
Fire hose reel (shared in complex)		item		
Pumps (shared in complex)		item		

Kitchen Assets	QTY	Unit	Cost (if known)	Date (if not settlement)
Cooktop		no.		
Cutlery & crockery		no.		
Dishwasher		no.		
Freezer		no.		
Garbage disposal unit		no.		
Microwave		no.		
Oven		no.		
Rangehood		no.		
Refrigerator		no.		
Stove		no.		
Water filters - electrical		no.		

Laundry Assets	QTY	Unit	Cost (if known)	Date (if not settlement)
Clothes dryer		no.		
Ironing board -freestanding		no.		
Irons		no.		
Washing machines		no.		

Outdoor Assets	QTY	Unit	Cost (if known)	Date (if not settlement)
Automatic garage door		item		
Barbecue - built in (shared in complex)		item		
Barbecue - freestanding		item		
Boomgates (shared in complex)		item		
External carpet		m2		
Furniture - freestanding external		item		
Garden Irrigation & Reticulation		item		
Automatic gates (shared in complex)		item		
Motorised Vergola		m2		
Spa - built in		item		
Spa - freestanding		item		
Pool filtration equipment		no.		
Pool heating		item		
Pool heating - solar		item		

Security Assets	QTY	Unit	Cost (if known)	Date (if not settlement)
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Access control, entry, security system (shared in complex)		item		
CCTV security system (shared in complex)		item		
Security alarm system		item		