
TaxShield Client & Property Information Checklist

The TaxShield Client & Property Information Checklist is a helpful tool to assist in providing the required Client and Property Details to create your TaxShield Depreciation Schedule.

TaxShield provides the framework and professional support to you with the assistance and guidance of our Qualified, Experienced and Professional Quantity Surveyors.

Simply PRINT the PDF Version of the Checklist, Complete and Input on our ONLINE Forms

OR

Complete the EXCEL Version of the Checklist, SAVE and EMAIL Return to us at: admin@taxshield.com.au

Please complete the TaxShield Checklist to the best of your ability in terms of what you know, what you have seen, what you have been told and from your Documents such as the Contract of Sale, Section 32 Vendor Statement, etc... Other Documents that may assist you such as the Original Sales Information, Current Property Condition Report from your Property Manager, Pre-Purchase Building Report, etc. that you may have in your possession.

When completing the Asset Section of the Checklist, all you simply need to do to the best of your ability is to tell us in the "Blank QTY Box" of any Eligible Assets that was acquired with the property on the Date of Settlement, ignoring the Costs and Date Box, as we will undertake the New Effective Valuation of these Eligible Assets acquired on the Date of Settlement, as your Quantity Surveyor.

If you have Replaced or Added any of the Eligible Assets that you see on the Checklist AFTER the Date of Settlement, then tell us the "Total Qty, Total Cost Incurred, and the Date of Acquisition" on the Checklist in the appropriate boxes next to that relevant Eligible Asset.

For any further assistance with the completion of the TaxShield Client & Property Information Checklist, kindly contact us via email at admin@taxshield.com.au or Call our National Hotline on 1300 780 892.

TaxShield Client & Property Information

Property Address: _____

Suburb: _____

Postcode: _____

Settlement Date: _____

Acquisition / Contract Date (if known): _____

Contract/Purchase Price: _____

Stamp Duty: _____

Legal Fees / Conveyancing: _____

Unimproved Land Value (refer Rates Notice): _____

Purchaser Name/s: _____

Contact Details (Tel, Mob & Email): _____

VISA or MASTERCARD Credit Card Details (Number, Exp Date, Last 3 Digits BACK of Card):

Building Type: New House, Old House, Townhouse, Lowrise, Highrise?

EXACT Construction Completion Date: _____

TOTAL Construction Cost (if known) OR Floor Area m² (approx.): _____

Description of Property (No. of Beds, Bath & Carpark) _____

General Assets	Qty	Unit	Cost (If Known)	Date (If NOT Settlement Date)
Air Conditioning - Centrally Ducted (Chilled or Evaporative ?)		item		
Air Conditioning - Split System		no.		
Air Conditioning - Packaged Unit		no.		
Air Conditioning - Room Wall 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		m ²		
Timber Floating Floor System		m ²		
Linoleum		m ²		
Vinyl Floor Coverings		m ²		
Furniture - Freestanding, Furniture Package (Provide List ?)		item		
Garbage Bins		no.		
Garbage Compacting Systems		no.		
Generators (shared in complex)		no.		
Gym Equipment - Cardiovascular (shared in complex)		item		
Gym Equipment - Resistance (shared in complex)		item		
Electrical Hand Dryers		no.		
Heaters - Electric (Ducted or Individual ?)		no.		
Heaters - Gas (Ducted or Individual ?)		no.		
Heaters - Other (Please State ?)		no.		
Heaters - Freestanding		no.		
Hot Water Unit - Electric		no.		
Hot Water Unit - Gas		no.		
Hot Water Unit - Solar		no.		

General Assets	Qty	Unit	Cost (If Known)	Date (If NOT Settlement)
Lifts		item		
Lamps - Floor Mounted, Freestanding		no.		
Lamps - Table, Freestanding		no.		
Linen		no.		
Master Antenna Television MATV (shared in complex)		item		
Mirrors - Freestanding		no.		
Radios		no.		
Rugs		no.		
Stereo System		no.		
Surround Sound System		no.		
Cordless Telephone		no.		
PABX System (shared in complex)		no.		
Telephone Handset		no.		
Television Antennas		item		
Television Sets		no.		
Vacumaid		item		
Vacuum Cleaners - Portable		no.		
Ventilation Fans		no.		
Video Cassette Recorder Systems (VCR) & DVD		no.		
Blinds		item		
Curtains		item		

Bathroom Assets	Qty	Unit	Cost	Date
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Exhaust Fans		no.		
"Heated" Towel Rails		no.		
Shower Curtains		no.		
Spa Bath Pump		no.		

Fire Control Assets	Qty	Unit	Cost	Date
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Fire Evacuation Speaker and Bells (shared in complex)		item		
Smoke Detector		no.		
Fire Break Glass Alarm (shared in complex)		item		
Fire Indicator Panel (shared in complex)		item		
Fire Extinguisher		item		
Fire Rose Reel (shared in complex)		item		
Pumps (shared in complex)		item		

Kitchen Assets	Qty	Unit	Cost	Date
Cooktop		no.		
Cutlery & Crockery		no.		
Dishwasher		no.		
Freezer		no.		
Garbage Disposal Unit / Insinkerator		no.		
Microwave		no.		
Oven		no.		
Rangehood		no.		
Refrigerator		no.		
Upright Stove - Cooktop & Oven Single Unit		no.		
Water Filters		no.		

Laundry Assets	Qty	Unit	Cost	Date
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Clothes Dryer - Electric		no.		
Ironing Board - Freestanding		no.		
Irons		no.		
Washing Machine		no.		

Outdoor Assets	Qty	Unit	Cost	Date
Automatic-Remote Garage Door		item		
Barbecue - Built-In (shared in complex)		item		
Barbecue - Freestanding		item		
Boomgates (shared in complex)		item		
External Carpet		m ²		
Outdoor Furniture - Freestanding		item		
Garden Irrigation, Reticulation, Sprinkler System - Automatic		item		
Automatic Gates (shared in complex)		item		
Motorised Vergola		m ²		
Spa - Built-In (shared in complex)		item		
Spa - Freestanding		item		
Pool Filtration Equipment		item		
Pool Heating (Electric or Gas ?)		item		
Pool Heating - Solar		item		

Security Assets	Qty	Unit	Cost	Date
Access Control, Entry, Security System (shared in complex)		item		
CCTV Security System (shared in complex)		item		
Security Alarm System		item		