



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.

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

Please complete the 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, Strata Plan 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.

Please Complete the Checklist File in terms of what Assets were there ONLY on the ORIGINAL Date of Settlement ONLY.

If you have done anything to the property AFTER the ORIGINAL Settlement Date, then you are now required to give the Incurred Paid Tax Invoice directly to your Tax Accountant, and they will look after this for you with the Evidence of your Post-Settlement Expenditure

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



Investment Property Address:			
Owner's name:		Mobile Number:	
Owner's address:		Email:	
Type of Owner	<input type="checkbox"/> Personal <input type="checkbox"/> Family Trust <input type="checkbox"/> SMSF <input type="checkbox"/> Company <input type="checkbox"/> Unit Trust		
When is the property available for rent? ⓘ			
If you did NOT engage a builder, please provide the following details:			
Purchase Price		Stamp Duty	
Purchase Date		Settlement Date	
Property Type	<input type="checkbox"/> House <input type="checkbox"/> Townhouse/Villa <input checked="" type="checkbox"/> Apartment Unit	Land Value	
Is it brand new when you acquired it? <input type="checkbox"/> Yes <input type="checkbox"/> No		Build Year	
If you engaged a builder, please provide specifications, drawings, and the following details:			
Total Construction Cost		Construction Completion Date	
<u>For Strata titled property only:</u>			
Unit Lot Entitlement ⓘ		Total Lot Entitlement ⓘ	
List the renovation works below:			
Description	Cost	Completion Date (MM/YYYY)	
List the furniture and appliances purchased by the owner:			
Description	Cost	Purchase Date	



Internal:

Total Internal Area _____ m2
Carpet _____ m2
Floating timber floor _____ m2
Vinyl _____ m2

Heating and Cooling:

A/C split system _____ no.
Ducted A/C _____ no.
Evaporative Cooler _____ no.
Ducted heating unit _____ no.
Window & Wall Box _____ no.
Air Conditioners _____ no.
Freestanding Heater _____ no.
 Gas Electric Wood

Bathroom and Laundry

Exhaust fan _____ no.
Heat lamp _____ no.
Heated towel rail _____ no.
Bathroom mirror _____ no.
Vanity _____ no.
Shower Curtain _____ no.
Washing Machine _____ no.
Clothes Dryer _____ no.

Electrical Services

Ceiling fan _____ no.
Ceiling fan light _____ no.
Lights _____ no.
External lights _____ no.
Pendant lights _____ no.
Smoke Detector _____ no.
EWIS speaker _____ no.
Solar power system _____ kw
Solar storage battery _____ no.

Hot water system:

Electric _____ no.
Gas _____ no.
Heat pump _____ no.
Solar _____ no.

Kitchen

Rangehood Oven Dishwasher
 Cooktop Upright stove
 Built-in Microwave Built-in Fridge
 Water filter Food Waste Disposal Unit

 Other assets: _____

Security System:

Intercom (Audio)
 Intercom (Audio and Video)
 CCTV Motion Detector
 Control panel Alarm bell
 Code pad Swipe card
 Other assets:

Please tick the rooms where there are blinds:

Bedrooms Living Dining Kitchen
 Bathrooms Laundry Stair Corridor
 Other rooms:

Please tick the rooms where there are curtains:

Bedrooms Living Dining Kitchen
 Bathrooms Laundry Stair Corridor
 Other rooms: _____

Other Assets:

NBN _____ no.
Garage Motor _____ no.
Garage remote control _____ no.
Overhead Door Closer _____ no.
Wardrobe _____ no.
Walk-in robe _____ no.
Ducted Vacuum _____ no.
Other Assets:

External Area:

Artificial Grass _____ m2
Concrete _____ m2
Pavers _____ m2
Timber Deck _____ m2
Auto Gate _____ no.
Clothesline _____ no.
Garbage Bins _____ no.
Rainwater tank (Poly) _____ no.
Rainwater tank (Steel) _____ no.
Pump _____ no.
Swimming Pool _____ m2
Pool Heater _____ no.
 Gas Electric Solar
Pool filter _____ no.
Portable Shed _____ no.

Other assets: _____



Common Area Assets (Apartments or Townhouses):

Count

Number of units: _____
Number of levels above ground: _____
Number of basement levels: _____
Number of lifts: _____
Number of staircases on each level : _____

Please tick the items that apply in the complex:

- | | |
|--|--|
| <input type="checkbox"/> Gym | <input type="checkbox"/> Swimming Pool |
| <input type="checkbox"/> Spa | <input type="checkbox"/> Sauna |
| <input type="checkbox"/> BBQ Area | <input type="checkbox"/> Tennis Court |
| <input type="checkbox"/> Reception | <input type="checkbox"/> Cinema |
| <input type="checkbox"/> Common Lounge | <input type="checkbox"/> CCTV |
| <input type="checkbox"/> Access Control System | <input type="checkbox"/> Fire hose reel |
| <input type="checkbox"/> Fire sprinkler System | <input type="checkbox"/> Fire extinguisher |

To optimize your depreciation on depreciable assets, kindly provide the sales contract containing the strata plan, lot entitlement schedule, floor plan, and specifications. Once we receive these items, we can promptly commence work on your depreciation report.

Email Address: admin@taxshield.com.au

Other Information: