TaxShield

# Client information checklist

taxshield.com.au · 1300 780 892 · admin@taxshield.com.au

To order, use the online order form at taxshield.com.au/order-tax-depreciation-package/. Your order goes to admin@taxshield.com.au. If you have this checklist, email the completed form and your documents directly to that address.

You do not need every item on day one. If you do not have a receipt, still tell us what was done — we can estimate using quantity surveying methods. Reports are completed within 5 business days from receipt of all information.

## 1 Owner details

Owner / entity name _____ Ownership split _____

Entity type

☐ Individual ☐ Joint ☐ Company ☐ Trust ☐ SMSF

Phone _____ Email _____

Accountant name and firm _____

## 2 Purchase details

☐ Contract of sale attached ☐ Vendor statement or other purchase document attached

Purchase price _____ Settlement date _____

Date first rented or available for rent _____

## 3 Property details

Property address _____

Property type

☐ House ☐ Townhouse or villa ☐ Apartment or unit ☐ Commercial ☐ Other

Year built / construction date _____ Builder details (if known) _____

## 4 Renovations and improvements

Include work by you or previous owners, with dates and costs. Invoices, receipts or a reasonable estimate are all useful. These records often add the most to a claim.

| Description | Date | Cost or estimate | Invoice attached |
|---|---|---|---|
| | | | ☐ |
| | | | ☐ |
| | | | ☐ |
| | | | ☐ |



Prepared in accordance with relevant ATO guidance. General information only, not tax advice. Confirm your claim with a registered tax agent or accountant.

## 5 New items since purchase

Items added after you bought the property — for example appliances, air-conditioning, blinds, carpets, solar and hot water — with dates and costs.

| Item | Date | Cost | Invoice attached |
|---|---|---|---|
| | | | ☐ |
| | | | ☐ |
| | | | ☐ |
| | | | ☐ |

## 6 Photos

Your own photos are enough. Wide shots of each space are most useful, plus a close-up of a model or serial plate if you can see one clearly. Tick what you are sending:

☐ Each room (kitchen, bathrooms, laundry, living areas, bedrooms)

☐ Plant and equipment (air-conditioning, hot water, solar, appliances, blinds, carpets, fans, garage door motor)

☐ Recent work ☐ Exterior (roof, fencing, driveway, pool, sheds)

## 7 Removed or replaced items

Items taken out or replaced since purchase can mean extra deductions through a scrapping report. See taxshield.com.au/scrapping-reports/

| Item removed or replaced | When | Replaced with (if anything) |
|---|---|---|
| | | |
| | | |
| | | |

## 8 Extras for commercial property

If the property is commercial, please also send the following. Commercial schedules are quoted individually. See taxshield.com.au/commercial-tax-depreciation-schedule/

☐ Fit-out costs and invoices attached ☐ Lease attached

Who paid for the works?

☐ Owner ☐ Tenant ☐ A mix of both / not sure

## 9 Extras for a CGT cost base report

If you need a CGT cost base report, please also send the following. A residential CGT cost base report is $595 + GST. See taxshield.com.au/cgt-cost-base-reports/

☐ Capital works and improvement records attached

Sale date _____ Sale price _____

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A residential tax depreciation schedule or residential CGT cost base report is $595 + GST. Commercial work is quoted individually.


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