



real estate tax depreciation

Professionals tax
PO Box 2688
Kent Town BC 5071
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Facsimile: 08 8363 7003
Email: dphillis@professionalstax.com.au
www.professionalstax.com.au
ABN 68 070 490 747

Dear Property Owner, completion of the attached form will assist Professionals to provide you with the maximum return on your investment property.

Non-completion of any of the areas on the form may delay the time we take to complete your schedule.

- Purchase price** – Total purchase price with land value
- Construction cost** – Does not include land value, stamp duty or legal fees
- Stamp duty/legal fees** – These figures do not include any money connected to your mortgages or refinancing. These figures can be found on your conveyancer's settlement letter.
- Land value** – The unimproved capital land value (UCV) or site value as at the date the property was purchased is required (not date became rental). If you don't know this leave blank, and we will get this figure for you.
- Contract date** – dd/mm/yyyy – Will always be before settlement date. The date you signed for property.
- Settlement date** – dd/mm/yyyy – The date you took possession of the property. Tax depreciation begins on all properties from the original date of purchase. This also applies if the property has been or is currently your principle place of residence.
- Construction completion date** – mm/yyyy - Available from the electricity supplier as the date meter first installed or from the local council. If built prior to 1985 just write "pre '85" in the appropriate box. If unsure leave blank, and we will follow up for you.
- Included in purchase price** – If the property was purchased with any furniture, please provide an inventory (and the cost if known). Some properties have renovations carried out prior to purchase please list any that you can identify and the date they were completed. This will assist in maximising your return.
- Immediate additions to the purchase price** – Professionals tax depreciation reports can **only** include furniture and renovations completed within approximately **1 month** of settlement. To enable us to include them in your schedule please supply a date, description and cost of these items.
- Later additions to the purchase price** – These items **are not included** in your schedule and should be claimed through your accountant or tax agent. This ensures accuracy within ATO guidelines.
- Major renovations** – If you have completed major renovations such as a complete refurbishment please contact a staff member to discuss. This ensures our service is giving you maximum return for our fee.

Payments

Professionals tax begins processing your information and investigating your property as soon as the completed form is received. For this reason we will process your payment on receipt of this form.

Questions or concerns

Should you have any further queries, please do not hesitate to contact any of our staff on 1300 768 896.

Yours sincerely

Paul Bennion
BAppSc(Quantity Surveying), AAIQS
Managing Director



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Order Form
RESIDENTIAL
\$599.50 (inc GST)

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PERSONAL	Name of purchaser(s)				
	Postal address			State	Post code
	Phone work	Fax	Home	Mobile	
	Email address				

PROPERTY	Unit complex name (if applicable)					
	Street address			State	Postcode	
	Fill in one line only	<i>Established home Purchased off plan</i>	Purchase price	Land value As at settlement	Date contract signed Day/Month/Year	Settlement date Day/Month/Year
		<i>Known construction cost House and land package</i>	Construction cost	Land cost	Date contract signed Day/Month/Year	Handover date Day/Month/Year
	Fees not connected to mortgage		Stamp duty	Legal fees		
	Name of contact to arrange inspection			Phone	Mobile	Fax
	Rental type (Please tick)	Holiday accommodation		Permanent let		
	Construction completion date If built prior to 1985 write "pre 85			Month/Year	Obtained from energy supplier as date meter installed or from Council	

RENOVATIONS	Included in purchase price	1. What furniture came with purchase?
		2. What renovations were included in the purchase price and when did they occur? <i>If extensive supply separate list</i>
	Within one month of purchase	These WILL be included in your schedule if descriptions, costs and dates are provided. <i>If extensive supply separate list</i>
These WILL NOT be included in your schedule and should be claimed through your accountant. <i>If a major renovation contact a staff member to discuss</i>		

REFERRER	Who referred you to Professionals Tax?		
	How did you hear about us?		
	Accountant's details Name & address		
	Phone	Fax	Mobile

We supply these details in acceptance of the offer to provide a detailed Property Tax Allowance Schedule for a once off tax deductible fee of \$599.50 (inclusive of GST)

Cheque or Money Order payable to Professionals Tax or please charge my credit card

Credit Card Details Visa MasterCard

Card Number: _____ Amount \$.....

Name on Card: Signature:..... Expiry Date.....