

# Self Managed Super Fund Restricted Property Assessment Engagement Form

Commercial

A.

decision certainty.

- Assessments will be completed within 2 working days of receiving payment and a compliant engagement form
- The assessment will be made on a no inspection basis and is supported by objective & relevant data
- Completed Assessment Report will be sent electronically to the instructing party

## 1 Client Details

Client Name

Phone Number

Email

Superannuation Fund Name

Instructing Party Name

Instructing Party Address

Postcode

Instructing Party Contact

## 2 Fee Details

Property Value

Up to \$2M: \$500 + GST (up to 2 tenants only)

\$2M — \$3M: \$750 + GST (up to 2 tenants only)

Complex/Retrospective: On a quote basis

## 3 Property Details

Property address

Postcode

Title Details [if known]

Is the property subject to a current transfer or sale agreement?

Yes No (If Yes, provide details below)

Are there any past or present environmental issues that we should be aware of?

Yes No (If Yes, provide details below)

Are there any encumbrances on the property? (easements, caveats etc)

Yes No (If Yes, provide details below)

## 4 Building Details

### Construction

✓ Check all that apply

### Floors

Reinforced concrete

Suspended concrete

Timber ▶ Suspended

Other \_\_\_\_\_

### External walls

Block work ▶ Rendered Painted  
 Brick work ▶ Rendered Painted  
 Concrete tilt slab ▶ Metal sheet  
 Aluminium cladding  
 Other \_\_\_\_\_

### Roof

Concrete Corrugated asbestos cement  
 Concrete tile  
 Metal sheet ▶ Translucent panels  
 Insulation  
 Other \_\_\_\_\_

### Accommodation

✓ Check all that apply

#### Warehouse

Clearspan  
 \_\_\_ x Roller shutters \_\_\_\_\_ H x \_\_\_\_\_ W  
 Lunch room Office/s  
 M (WC) F (WC)  
 Uni Shower  
 Area \_\_\_\_\_ m<sup>2</sup>

#### Mezzanine office

Approved Yes No

Reception Waiting area  
 Showroom Boardroom  
 \_\_\_ x Offices Open plan office  
 Server room M&F amenities  
 Lunch room Other \_\_\_\_\_  
 Area \_\_\_\_\_ m<sup>2</sup>

#### Office

Reception Waiting area  
 Showroom Boardroom  
 \_\_\_ x Offices Open plan office  
 Server room M&F amenities  
 Lunch room Other \_\_\_\_\_  
 Area \_\_\_\_\_ m<sup>2</sup>

#### Retail / Showroom

Open plan retail/display/dining  
 Commercial kitchen  
 Cold room Freezer  
 \_\_\_ x Offices Storeroom  
 Server room M&F WC's  
 Lunch room Other \_\_\_\_\_  
 Area \_\_\_\_\_ m<sup>2</sup>

### Services

Sprinkler system Security alarm  
 CCTV Fire controls  
 Ducted A/C Split A/C  
 Solar power \_\_\_\_\_ Kw  
 Other \_\_\_\_\_

### Ancillary Improvements

\_\_\_ x Car parks (exclusive)  
 Gated entry Fencing  
 Flood lighting Bollards  
 Common Lift/s Common M&F amenities  
 Common lunch room Other \_\_\_\_\_

## 5 Description of improvements

## 6 Income Details

Number of Tenancies (incl. areas owner occupied)	1	2
Is the Tenancy related to the SMSF owner manager in any way?	Yes No	Yes No
Lessee		
Tenancy Area (m <sup>2</sup> )		
Tenancy Rental \$ p.a. excluding GST	\$	\$
Commencement Date	/ /	/ /
Current Term Expiry Date	/ /	/ /
Outgoings recoverable in addition to the rent - \$p.a. excluding GST	\$	\$

! Please provide current rental invoice for each tenant

## 7 Current Outgoings

Please provide a copy of current budgeted outgoings schedule, if available. Alternatively, please provide:

	\$ per annum	Notice/s Provided	
Council Rates	\$	Y	N
Water Rates	\$	Y	N
Body Corporate Levies	\$	Y	N
Other	\$	Y	N

## 8 Current Reported Market Value

\$

## 8 Declaration

The instructing party certifies that the above information is correct and acknowledges that Acumentis has relied solely upon the information provided.

You agree that this form is a formal contract between Acumentis and the instructing party.

Assessment will not commence until Acumentis has confirmed the engagement form received is compliant.

You have read and agree to the T & Cs. provided on: [www.acumentis.com.au/our-services/smsf-terms-and-conditions/](http://www.acumentis.com.au/our-services/smsf-terms-and-conditions/)

Superannuation Fund Name ABN

Name Position

Email Phone Number

Signature

Date

Did you know that  
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Contact us on **1300 882 401** or visit [acumentis.com.au](http://acumentis.com.au) and we will be happy to help.