Cost Segregation Partners

PROPOSAL general information

CPA firm/prospective client name:

Entity name:

Contact name:

Email:

Corporate address:

Phone:

Fax:

Date report is needed by:

How did prospective client hear about CSP?

PROJECT NAME:

1	Cost basis of building (excluding land): $ **1a** Land cost: $
2	Placed in service date or estimated date of completion (month/year):
3	Purchased or constructed? (circle one)
4	If purchased, date original constructed (if known):
5	If purchased, does appraisal report exist?
6	If constructed, contract date:
7	Has the 2010 tax return been filed?
8	Industry type (nature of business activity at facility - retail, office, manufacturing, etc.)
9	Company ownership structure (C or S Corp, LLC, Partnership, etc.) **9a** Is passive loss limitations any issue for the flow thru members?
10	Obtain copy of regular tax depreciation schedule for entity owning the real estate: **10a** Asset number from depreciation schedule to be included in study:
11	Do you plan on holding building for 5 years?
12	Approx. square footage of building: **12a** Site size:
13	Was the property purchased through a 1031 exchange? If yes, what is the additional consideration or “boot” paid? $
14	Number of tenants/units:
15	Physical address of property(s):
16	Were any improvements made to the building? If yes, what month/year(s):
17	Any unique features of the facility or facilities? **17a** If yes, please describe:
18	Is there more than one building on the property? If yes, how many?
19	Do blueprints, site plan and/or survey and construction records (AIA documents) exist for each facility? **19a** If not, can they be obtained from another source?
20	What are the effective Federal and State tax rates for the entity owning the real estate? Federal: State:
21	Are you currently paying income taxes? **21a** If no, have you paid taxes in the prior 2 years?