



## 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?

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### PROJECT NAME:

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**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 (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?