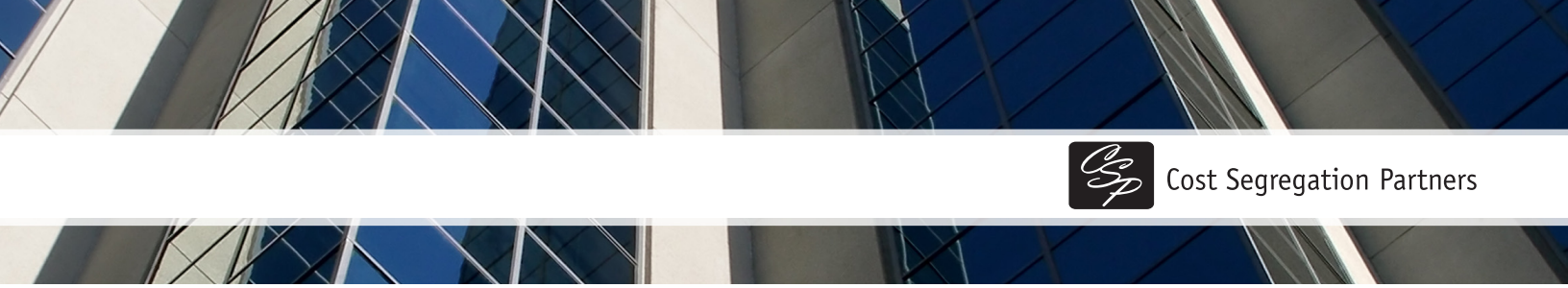

Cost Segregation Partners

Proposal General Information

CPA Firm/Prospective Client Name: Entity Name:
Contact Name: Phone: Fax:
Email: Corporate Address:
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 and 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 2009 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.)
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? 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? 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 5 years?