



**COST SEGREGATION
ESTIMATE AND PROPOSAL REQUEST**

For a complimentary Cost Segregation Estimate and Proposal, please complete the following and fax to our office at the fax number below or email all necessary information to jmorris@costsegresults.com.

Building Owner Representative Information:

Name: _____ Phone: _____

Email: _____

Relationship: Self CPA/Accountant Other

If Other state relationship: _____

Owner / Client Information:

Owner's Name: _____

Fax: _____ Email: _____

Contact: _____ Phone: _____

Fax: _____ Email: _____

Mailing Address (if different): _____

Entity Name (Holding Company): _____

Property Information:

Property Name: _____

Description: _____

Building Usage: _____ Building Sq Footage: _____ Lot Size
or Acreage: _____ No. of Floors: _____ Tenants: YES NO

Property Physical Address: _____

City: _____ ST: _____ Zip: _____

Estimate Information and Documents:

If study is requested between 3/1 and 4/15 is it possible to file an Extension? _____

Please include the following information:

- Tax Depreciation Schedules (If any filed)
- If building is new, also submit one of the following:**
- New Build - Submit AIA Payment Application (or final builders invoice)
- New Purchase or Acquisition - Submit:
 - Closing Documents
 - Recent Appraisal with Land Value Allocation

Was the property acquired under a 1031 Exchange: YES NO
If yes, what was the capital gain allocation? _____

Was the property acquired by a 754 Step-Up: YES NO
If yes, submit a **new** fair market value statement.

FAX TO: 1-888-736-7511