

Cost Segregation Appraisal Services - Client Intake Form

Basic Information

Full Name/Business Name:

Contact Person (if different):

Contact Information (Phone, Email):

Preferred Communication Method:

Property Details

Property Address:

Property Type (e.g., office, retail, industrial, multifamily, etc.):

Approximate Size (square footage):

Year of Purchase or Construction:

Current Use of the Property:

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Ownership and Financial Information

Is the property owned by an individual, partnership, LLC, or corporation?

Are there any co-owners?

Purchase Price or Construction Cost:

Date of Acquisition or Completion:

Any Renovation or Improvement Costs (dates and amounts):

Depreciation Already Taken (if applicable):

Purpose and Goals

What is your primary goal for the cost segregation study? (e.g., tax savings, cash flow improvement, financial planning)

Have you previously conducted a cost segregation study on this or other properties?

Who is your tax advisor or CPA? (Name and Contact Information)

Are you currently under a tax audit? Yes No

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Property-Specific Details

Was the property newly constructed, purchased as-is, or renovated?

Were there any tenant improvements? Yes No

Check any of the following documents you have. Please bring them to your appointment or upload them on our secure portal.

Purchase Agreement & Closing Statement

Previous Tax Returns & Depreciation Schedules

Construction Invoices & Cost Breakdowns

Architectural & Engineering Plans

Timeline and Logistics

Are there any deadlines we need to be aware of?

When do you need the completed cost segregation report?

Is site access available for inspection? Yes **No**

Is there a designated contact for on-site coordination?

Other Information

Are you interested in other related services, such as energy tax credits or property tax consulting?

Do you have any specific concerns or expectations for this project?

