

Cost Segregation Proposal Checklist:

- 1- Cost basis of property or estimated cost to complete.
- 2- Date placed in service or estimated date of completion.
- 3- Description on type of building (i.e. mfg., office bldg., restaurant, etc.)
- 4- Approximate square footage of facility.
- 5- Describe company's business operations.
- 6- Explain company ownership structure (i.e. C or S Corporation, LLC or Partnership, etc.)
- 7- Nature of the business activity which will be carried on at facility.
- 8- Obtain copy of regular tax depreciation schedule for entity owning real estate.
- 9- Was the building purchased or constructed?
- 10- Is the building free standing? If not, explain Denote if located on a city block.
- 11- 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?
- 12- If purchased facility, does appraisal report exist?
- 13- Provide location of each property involved in project (City and State)
- 14- Any unique features of the facility or facilities? If yes, please describe
- 15- What are the effective federal and state tax rates for the entity owning the real estate?