



AssuredPartners_{NL}

Tax Solutions

INFO FOR A COST SEGREGATION BENEFIT ANALYSIS

BASIC INFORMATION

Legal Name of Entity: _____
Name of Owner: _____ Phone # _____
Property Contact Person: _____ Phone # _____
Complete Property Address: _____
Building Usage: _____ Tenants: **Yes** or **No** (Circle one)
Bldg. Sq. Ft: _____ Number of Floors: _____ Number of Units: _____

TO DO A NO COST / NO OBLIGATION BENEFIT ANALYSIS

Given the information below, **AssuredPartners NL (AP NL)** will prepare a **no cost, no obligation** Benefit Analysis. Included in this analysis is a conservative estimate of the depreciation expense that can be legitimately accelerated with an actual study to aid the property owner and his CPA in effectively evaluating the service in advance

Information needs vary according to whether building was purchased or was constructed/renovated

1. IF BUILDING PURCHASED:

Date Building was Acquired: _____

Description of Building at Time of Purchase: _____

Please provide:

- **Current Tax Depreciation Schedule (or Fixed Asset Schedule)**
- Appraisal (if available)
- Site Survey (if available)
- Rent Roll (if applicable)
- Purchase Agreement

2. IF NEW CONSTRUCTION/RENOVATION:

Date Placed in Service: _____

Please provide:

- **Current Tax Depreciation Schedule (or Fixed Asset Schedule)**
- **Current or Final Payment Application with Change Orders**
- **Projected Budget**
- Construction Plans (if available - **electronic version preferred**)
- Detail of Any Capitalized Costs not included in Payment Application

NOTE: If any of this information is not available (often the case), AP NL can still prepare a Benefit Analysis. Obviously, the amount of information provided will affect Benefit Analysis estimates.

To receive a **FREE, no obligation analysis** of your property's potential tax and cash flow benefits from an **AP NL** cost segregation study send this completed form to:
jeff.liebert@assuredptrnl.com or phil.muldoon@assuredptrnl.com