



Proposal General Information

CPA Firm/Prospective Client Name: _____

Contact Name: _____

Phone: _____ Fax: _____ Email: _____

Date report is needed by: _____

How did prospective client hear about CSP? _____

Project Name:	
1	Cost basis of property: \$
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? YES NO
6	If constructed, Contract Date:
7	Type of building (mfg, ofc, restaurant, etc.)
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:
11	Do you plan on holding building for 5 years? YES NO
12	Approx. square footage of building:
13	Number of floors:
14	Number of tenants/units:
15	Is building free standing? YES NO If not, denote if located on a city block.
16	Location of building (City and State):
17	Were any improvements made to the building? YES NO If yes, what month/year(s):
18	Any unique features of the facility or facilities? YES NO If yes, please describe:
19	Is there more than one building on the property? YES NO If yes, how many? If yes, see page 2.
20	Do blueprints, site plan and/or survey and construction records (AIA documents) exist for each facility? YES NO If not, can they be obtained from another source?
21	What are the effective Federal and State tax rates for the entity owning the real estate? Federal: State:
22	Are you currently paying income taxes? YES NO

MULTIPLE BUILDINGS: Please provide the following information for each building.

1a	Cost basis of property: \$
2a	Placed in Service date or estimated date of completion (month and year):
3a	Purchased or Constructed? (circle one)
4a	If purchased, date original constructed (if known):
5a	If purchased, does appraisal report exist? YES NO
6a	If constructed, Contract Date:
7a	Type of building (mfg, ofc, restaurant, etc.)
8a	Industry type (nature of business activity at facility - retail, office, manufacturing, etc.)
9a	Company ownership structure (C or S Corp, LLC, Partnership, etc.)
10a	Obtain copy of regular tax depreciation schedule for entity owning the real estate:
11a	Do you plan on holding building for 5 years? YES NO
12a	Approx. square footage of building:
13a	Number of floors:
14a	Number of tenants/units:
15a	Is building free standing? YES NO If not, denote if located on a city block.
16a	Location of building (City and State):
17a	Were any improvements made to the building? YES NO If yes, what month/year(s):
18a	Any unique features of the facility or facilities? YES NO If yes, please describe:
19a	Do blueprints, site plan and/or survey and construction records (AIA documents) exist for each facility? YES NO If not, can they be obtained from another source?

