



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 building (excluding land): \$ |
| 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 | Has the 2007 tax return been filed? YES NO |
| 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: _____ Site Size: _____ |
| 13 | Was the property purchased through a 1031 exchange? YES NO If yes, what is the additional consideration or "boot" paid? \$ |
| 14 | Number of tenants/units: |
| 15 | Location of building (City and State): |
| 16 | Were any improvements made to the building? YES NO If yes, what month/year(s): |
| 17 | Any unique features of the facility or facilities? YES NO If yes, please describe: |
| 18 | Is there more than one building on the property? YES NO If yes, how many? |
| 19 | 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? |
| 20 | What are the effective Federal and State tax rates for the entity owning the real estate? Federal: _____ State: _____ |
| 21 | Are you currently paying income taxes? YES NO |