



PO Box 561374
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Cost Segregation Study Profile Questionnaire for Free Analysis

Business Contact Name: _____

Ownership Entity Name or DBA: _____

Subject Property Address: _____

Contact Email: _____ Phone: _____

Property has been: _____ Constructed / _____ Acquired and/or _____ Renovated

Date property was placed in-service by this owner: _____ (month/year)

Multiple in-service dates for building phases or renovations? _____ (mo/year) _____ (mo/year)

Total costs to construct or purchase this property (EXCLUDING LAND VALUE): \$ _____

If renovated, renovation cost was: \$ _____ Date renovation was completed: _____ (mo/year)

Basic description of the facility (Office, Retail, Restaurant, Warehouse etc...): _____

Briefly describe any known special processes (e.g. product manufacturing, food preparation, medical procedures, etc.) _____

Does subject property stand alone or is it in a complex?: _____

If in a complex, what % of common property is owned?: _____

Approximate Square footage: _____ Number of floors: _____ Site Acreage: _____

Are plans, blueprints, drawings, appraisals available? (Y/N)____ If so, which? _____

Is the property tenant or owner occupied? _____

Additional Info: _____

Your tax consultant's name: _____ and Company _____

Phone# _____ Email _____

- *Owner Constructed:* the building was constructed by/for this owner and the owner has actual construction cost records. The project may have been in-service for a number of years already.
- *Acquired Property:* the building was purchased by this owner, the actual construction costs are not known.
- Submit this form to Blue Ray Engineering for a FREE fee proposal and a net present value estimate (estimate \$ value of accelerated depreciation and a potential ROI). This will typically be provided within three business days.
- Upon engagement, the project segregation cost target will be solidified (provided and concurred by both parties), the plans and any supporting documents (those not already received) should be sent and the study will be started.



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When a CSS proposal is accepted/engages, BRE will need:

1. The physical data that was previously inquired about for the proposal phase – if not already provided (constructions plans – if available, contractor pay requests, costs, etc)
2. CSS Target Number (total costs to be segregated)
 - a. New Construction: combined owner-direct and construction contract costs to be included in the CSS. [Typically the personal property that is clearly not part of the building (furniture, computers, stand-alone items) are left out of a CSS in that they have a known shorter life already]
 - b. Acquired Property: purchase price minus land value
3. Legal Ownership Title (e.g. ABC Ventures, LTD or 123 Company, LLP)

4. Preferred Property Name (common or advertised name of the business)

5. In-service date/s _____
6. Point of Contact information - for someone at the site (who will we arrange the site work with)
 - a. Name _____
 - b. Phone/Cell# _____