Cost Segregation Intake

Tell us about the building. We use this to see whether a study makes sense for you.

About the property

OWNER (NAME OR ENTITY ON TITLE)		
HOW YOU HOLD IT	Choose	
PROPERTY ADDRESS		
TYPE OF PROPERTY	Choose	
DATE YOU BOUGHT IT		
DATE FIRST READY TO RENT		
PURCHASE PRICE		
LAND VALUE ON YOUR PROPERTY TAX BILL		Optional. Helps us split land and building.
BUILDING SQUARE FEET		
LOT SIZE		
YEAR BUILT		
NUMBER OF UNITS		

Improvements since you bought it

YEAR	DESCRIPTION	COST
	Total improvements	

Cost Segregation Intake

A few questions, the documents we need, and notes.

A few questions

HAVE YOU CLAIMED DEPRECIATION ON IT ALREADY?	Choose
HAS A COST SEGREGATION STUDY BEEN DONE BEFORE?	Choose
DO YOU EXPECT TO SELL WITHIN FIVE YEARS?	Choose
REAL ESTATE PROFESSIONAL, OR A SHORT-TERM RENTAL?	Choose
DO YOU OR YOUR FAMILY LIVE IN ANY PART OF IT?	Choose
DID YOU GET IT IN A 1031 EXCHANGE?	Choose

Documents to send

Tick each one you're sending. Upload them to the LaviCPA Client Portal.

- Closing statement from the purchase
- Depreciation schedule from your last return
- Property tax bill with assessed values
- Rent roll
- Photos of the interior and exterior
- Building plans, appraisal, or inspection report, if you have them
- Invoices for improvements listed

Anything else we should know

Want a quick look first? Try the cost segregation estimator at lavicpa.com.