DOCUMENT CHECKLIST

Everything we need to run a cost segregation study — and what to do about the things you cannot find.

Send what you have. Nothing on this list is a blocker; missing records change the costing method we use, not whether the study can be done. Anything marked essential we genuinely cannot start without.

Essential

- Closing settlement statement (ALTA or HUD-1)
- Current depreciation schedule or fixed-asset listing
- Most recent filed tax return for the owning entity
- Property address and legal description

Very helpful

- Purchase appraisal, especially any land versus improvement allocation
- County property tax assessment showing land and improvement values
- Title commitment or survey
- Rent roll and leases (shows tenant-funded versus landlord-funded work)
- Insurance replacement cost schedule

If you built or renovated

- Architectural, structural, MEP and site drawings
- General contractor schedule of values
- AIA pay applications, interim and final
- Change order log
- Subcontractor invoices or bid packages
- Certificate of occupancy
- Construction loan draw schedule

Improvements since you took ownership

- Invoices or capitalised cost records by year
- Description of what was replaced and roughly when
- Any partial disposition elections already made

Access for the site inspection

- Site contact name and number

- Tenant coordination requirements or notice periods
- Best three-week window
- Any restricted areas we should know about in advance

If you cannot find the construction records

That is normal, particularly on property bought from a prior owner. We shift to a detailed engineering estimate: quantities taken off the physical building during inspection, priced from published cost data adjusted for location, vintage and quality, then reconciled back to your actual capitalised basis so nothing is created or lost. The report discloses the method used, which is what makes it defensible.

Where to send it

Email studies@deprecio.com or use the secure upload link we send at engagement. Do not email documents containing full taxpayer identification numbers; we will provide the upload link for anything sensitive.