PROPERTY DATA SHEET

One page per property. Capture it once and every downstream conversation gets faster.

Fill one of these in for each property. It is the same information our intake assistant collects, in a form you can print, complete by hand and keep in the property file.

Property

Property name	
Street address	
City, state, ZIP	
Property type	
Square footage	
Unit / key / bay count	
Year built	
Year you placed it in service	

Basis

Purchase price or construction cost	
Land value and its source	
Depreciable basis	
Capitalised acquisition costs	
Current accumulated depreciation	
Recovery period currently used	

Improvements since acquisition

YEAR	DESCRIPTION	COST	STILL IN PLACE?

YEAR	DESCRIPTION	COST	STILL IN PLACE?

Ownership

Owning entity and type	
Ownership percentages	
Related-party tenants	
Financing — recourse or non-recourse	
States where returns are filed	

Tax position

Real estate professional status (Y/N)	
Average period of customer use, if short-term rental	
Material participation basis	
Other passive income available	
Section 163(j) election made? (Y/N)	
Expected hold period	

Records available

- Closing statement
- Appraisal
- Depreciation schedule
- Drawings
- Schedule of values
- Pay applications

- Change orders
- Certificate of occupancy

Prepared by Deprecio, an engineering-based cost segregation firm and part of the Shurek Accounting & Tax family of brands. This handout is general information and not tax, legal or investment advice. No client relationship is created by reading it. Figures reflect federal law as understood for the 2026 filing season and change with legislation; confirm current amounts before relying on them. To discuss a specific property, book a free feasibility review at https://deprecio.com/schedule/ or send the property details to studies@deprecio.com.