

We appreciate your introduction to a potential new satisfied client.

We value your trust in our services and would like to reward you for referring new clients to us. Please fill out the following information for each referral you provide. We will contact each referral directly and provide them with exceptional service. We will share 10% of the Study fee as a referral reward once a client has signed and paid their final Cost Segregation Study fee.

Referred Person or Business			
Name		Phone	
Business Name		Email	
Website <small>If applicable</small>			
Date Property was Purchased			
Purchase Price of Property			
Have you utilized Cost Seg on prior properties?			

How Our Process Works
Step 1 • Tax Depreciation Schedule Provide your CSSI Rep with your federal tax depreciation schedule.
Step 2 • Analysis CSSI will provide a no-cost predictive analysis so an informed business decision can be made.
Step 3 • Engage We will collect a 50% retainer for the project and begin our process.
Step 4 • Data Collection CSSI will work to collect supporting documentation for the project. Documentation includes appraisals, blueprints, closing documents, cost detail information, etc.
Step 5 • Survey The property will be surveyed with a complete photo narrative for our analysts.
Step 6 • Final Report Approximately six weeks after all data has been collected, the final study will be completed. The 3115 form will also be provided if the tax professional prefers.

