Overview	These instructions are provided as a guide to assist you in using Cost Seg EZ to generate a cost segregation report for your property. We also have a number of other resources available if you need additional assistance. Check out our Cost Seg EZ YouTube channel for helpful instructional videos or reach out to us directly using the contact information posted on the Cost Seg EZ website. https://www.youtube.com/@costsegez	

Input Name	Input Instructions	*Required
Name	Please enter your first and last name.	Yes
Company	Please enter the name of your company or the entity/person that owns the property.	Yes
Email	Please enter your email address.	Yes
Phone	Please enter your phone number.	Yes
Property Name	Please enter the name of the property or project. If the property does not have a name, you can use the street address. For example, if the property is located at 123 Main St, New York, NY, you could use "123 Main St" as the property name.	Yes
Property Type	Please select the property type from the drop-down menu. Currently Cost Seg EZ is only available for the residential property types listed here. Please contact us for assistance with Cost Segregation for other property types.	Yes
Street Address	Please enter the street address of the property.	Yes
City	Please enter the city of the property.	Yes
State	Please select the state of the property.	Yes
Zip	Please enter the zip code of the property.	Yes
Building Cost Basis	Please enter the total tax cost basis of the building, excluding land. For acquired properties, this is typically the purchase price of the property less an allocation of the purchase price to the land value. The total purchase price can be found in the settlement statement and/or the depreciation schedules attached to your federal income tax return. The land allocation is sometimes calculated based on the appraisal or property tax assessment. For newly constructed properties, this is typically the total capitalizable construction costs. If needed, please contact us or your qualified tax advisor for assistance with this input.	Yes
Purchase Date	Please enter the purchase date or the depreciation start date for the building. For acquired properties, this is typically the purchase date of the asset (assuming the property is ready and available for its intended use on the day it is purchased). This can also be found on the depreciation schedules attached to your federal income tax return for the tax year the property was purchased. For newly constructed properties, use the construction completion or certificate of occupancy date. If needed, please contact us or your qualified tax advisor for assistance with this input.	Yes
Current Tax Year	Please enter the tax year you intend to implement the Cost Segregation results. For example, if you plan on including the Cost Segregation results with your federal income tax return for the year ended 12/31/2022 and you complete the Cost Segregation analysis and file your tax return during March of 2023, then select "2022" for this input. If needed, please contact us or your qualified tax advisor for assistance with this input.	Yes
Bonus Depreciation Percentage	Please select the applicable bonus depreciation percentage for the property. Click link below more information regarding bonus depreciation and the applicable percentages. If needed, please contact us or your qualified tax advisor for assistance with this input. https://docs.google.com/document/u/2/d/e/2PACX-1vTvexZA5vcTfi1ELDOpS4Igq54regWWbRs2iTjTlsVQKk2GaDAY4TSXT590zGMskQBH5W_YoaVFoI3Q/pub	Yes
ROI Factor	Please enter your estimated rate of return on investment.	Yes
Federal Tax Rate	Please enter your estimated federal income tax rate for the current tax year. If needed, please contact your qualified tax advisor for assistance with this input.	Yes

Total Building Square Footage	Please enter the total square footage of the building. This information can typically be found in the appraisal and/or the property tax records. For condos, input the square footage of your unit only. Click {here} for more information regarding how to search property tax records.	Yes
Construction Quality	Please select the appropriate construction quality of the building. For purposes of using Cost Seg EZ, the construction quality can be determined based on the following criteria: Low: This class of construction may include properties that are older and in need of significant repairs or updates. They may have outdated finishes, appliances, and systems, and may not be as energy efficient as newer properties. The materials and craftsmanship used in the construction of these properties may be of lower quality, and the properties may not have as many features or amenities as higher quality properties. Average: Properties in the average class of construction are likely to be of a more typical standard for a given area. They may have been built more recently than low quality properties, but may not have as many high-end finishes or features as higher quality properties. These properties may have good bones and be well-maintained, but may not have been built with the same level of attention to detail as higher quality properties. Good: Properties in the good class of construction are likely to have been built with high-quality materials and craftsmanship, and may have many features and amenities that set them apart from lower quality properties. These properties may have been built more recently and may be more energy efficient, with updated appliances and systems. They may also have higher-end finishes and may be well-maintained. Best: Properties in the best class of construction are likely to be the most luxurious and well-built properties in a given area. They may have the highest-quality materials and craftsmanship, and may have many high-end finishes and features. These properties may be newer and may be built with the most advanced technologies and energy efficiency in mind. They may also be located in desirable areas or have exceptional views or other desirable	Yes
Property Condition	Please select the appropriate condition of the property at the time of acquisition. If newly constructed, please select "Excellent". For purposes of using Cost Seg EZ, the property condition can be determined based on the following criteria: Poor: A property in poor condition is likely to have significant issues that need to be addressed. It may have structural problems, outdated systems and appliances, and/or cosmetic defects that need to be repaired or replaced. A property in poor condition may require significant repairs and updates in order to bring it up to standard, and may not be livable in its current state. Fair: A property in fair condition may have some issues that need to be addressed, but these issues are likely to be less severe than those found in a property in poor condition. These issues could include cosmetic defects, outdated systems and appliances, and/or minor structural problems. A property in fair condition may still be livable, but may require some repairs or updates in order to bring it up to a higher level of condition. Average: A property in average condition is likely to be in a state of general maintenance and repair. It may have some minor issues that need to be addressed, but is likely to be in good working order overall. A property in average condition may have some outdated systems or appliances, but these are likely to be functional. It may also have some cosmetic defects, but these are likely to be minor and not significantly impact the overall appearance of the property. Good: A property in good condition is likely to be well-maintained and in good working order. It may have been recently updated or renovated, and is likely to have functional systems and appliances. A property in good condition may have some cosmetic defects, but these are	Yes

Year Built	Please enter the year the building was constructed or the year of the most recent significant renovation. This information can typically be found in the appraisal and/or the property tax records. For older properties, you may use the effective age instead of the actual year of construction. For example, the property may have been built in 1910 but the appraisal assigns an effective age of 20 years. If the property was purchased and appraised in 2022, you could use 2002 as the year built (i.e., 2022-20 = 2002). Click the link below for more information regarding how to search property tax records. https://www.youtube.com/watch?v=pSykUiYhA5g	Yes
# of Units	Please enter the total number of residential dwelling units in the building. This number should correspond with the property type that was previously selected. For example, if the property type is "Multifamily Residential (2-3 units)", then this input should be either 2 or 3. If the property type is "Single-Family Residential" or "Condo", then this input should be 1.	Yes
Total # of Bedrooms	Please enter the total number of bedrooms in the building. This amount should include the combined number of bedrooms across all units that you own. For example, if the property is a 4 unit multifamily residential property and each unit has 2 bedrooms, then this input should be 8 (i.e., 4 units x 2 bedrooms per unit = 8).	Yes
Rental Type	Please select the type of rental the property is used for. Short term rentals typically have an average length of stay < 30 days. Long term rentals typically have an average length of stay of 30 days or more.	Yes
Hardwood	Please enter the estimated % of the total building square footage for each type of floor covering present at the property. If dimensioned floor plans are available, these percentages can be calculated based on the measurements for each room. If no dimensioned floor plans are available, than a best estimate may be used. Each input in this section must be between 1% and 100% (or can be left blank). The sum of all the inputs cannot exceed 100%.	No
Laminate / Floating		No
Luxury Vinyl Tile/Plank		No
Hard Tile		No
Carpet		No
Sheet Vinyl		No
Other		No
Kitchen Cabinet Type	Please select the type of kitchen cabinets at the property. If there are different types of cabinets in different residential units, then select the type that is most indicative of the entire property.	Yes
Kitchen Countertop Type	Please select the type of kitchen countertops at the property. If there are different types of countertops in different residential units, then select the type that is most indicative of the entire property.	Yes
# of Ceiling Fans per Unit	Please select the number of ceiling fans per unit at the property. If there are different numbers of ceiling fans in different units, then use the average number of ceiling fans per unit. For example, if you have a duplex with 2 ceiling fans in one unit and 4 ceiling fans in the other unit, then this input should be 3.	Yes
Type of Window Treatments	Please select the type of window treatments at the property. If there are different types of window treatments in different residential units, then select the type that is most indicative of the entire property.	Yes
Type of Closet Shelving	Please select the type of closet shelving at the property. If there are different types of closet shelving in different residential units, then select the type that is most indicative of the entire property.	Yes
Cooking Range & Oven	Please select the kitchen appliances that are present at the property. If the majority of the residential units have the appliance, then check the box for that appliance. For example, if you have a 4 unit property and 3 of the units have dishwashers but 1 does not, still check the box for dishwasher.	No
Vent Hood		No
Microwave		No
Garbage Disposal		No
Refrigerator		No
Dishwasher		No
Total # of Washers	Please select the total number of clothes washers at the property. If the laundry equipment is owned by a third party, then select 0.	Yes
Total # of Dryers	Please select the total number of clothes dryers at the property. If the laundry equipment is owned by a third party, then select 0.	Yes
Pool Type	If the property has a swimming pool, please select the type of swimming pool. For condo properties, please first confirm that you do own an interest in the common area elements.	Yes

Pool Size	Please enter the square footage of the water surface of the swimming pool. This information may be found in the site survey. If not, then a best estimate may be used. For condos, please adjust this input to account for your ownership interest %. For example, if the swimming pool is 100 square feet and you own a 5% interest in the common area elements, then this input should be 5 (i.e., 100 square feet x 5% = 5 square feet). Click the link below for more information regarding how to use Google Earth to take measurements of exterior improvements. https://www.youtube.com/watch?v=b3nXSFftfG8	Yes
Driveway Type	If the property has a driveway or parking lot, please select the type of material. For condo properties, please first confirm that you do own an interest in the common area elements. For properties with parking garages only, select "None".	Yes
Driveway Size	Please enter the square footage of the driveway or parking lot surface. This information may be found in the site survey. If not, then a best estimate may be used. For condos, please adjust this input to account for your ownership interest %. For example, if the parking lot is 100 square feet and you own a 5% interest in the common area elements, then this input should be 5 (i.e., 100 square feet x 5% = 5 square feet). Click the link below for more information regarding how to use Google Earth to take measurements of exterior improvements. https://www.youtube.com/watch?v=b3nXSFftfG8	Yes
Patio	If the property has a patio, please enter the square footage of the patio surface. This information may be found in the site survey. If not, then a best estimate may be used. Click the link below for more information regarding how to use Google Earth to take measurements of exterior improvements. https://www.youtube.com/watch?v=b3nXSFftfG8	No
Deck	If the property has a deck, please enter the square footage of the deck surface. This information may be found in the site survey. If not, then a best estimate may be used. Click the link below for more information regarding how to use Google Earth to take measurements of exterior improvements. https://www.youtube.com/watch?v=b3nXSFftfG8	No
Landscaping	If the property has landscaping, please enter the square footage of the landscaped area. Exclude any areas with natural vegetation and plantings that have not been improved in any way. This information may be found in the site survey. If not, then a best estimate may be used. For condos, please adjust this input to account for your ownership interest %. For example, if the landscaped area is 100 square feet and you own a 5% interest in the common area elements, then this input should be 5 (i.e., 100 square feet x 5% = 5 square feet). Click the link below for more information regarding how to use Google Earth to take measurements of exterior improvements. https://www.youtube.com/watch?v=b3nXSFftfG8	No
Irrigation System	If the property has an irrigation system, please enter the square footage of the area covered by the irrigation system. This information may be found in the site survey. If not, then a best estimate may be used. For condos, please adjust this input to account for your ownership interest %. For example, if the irrigated area is 100 square feet and you own a 5% interest in the common area elements, then this input should be 5 (i.e., 100 square feet x 5% = 5 square feet). Click the link below for more information regarding how to use Google Earth to take measurements of exterior improvements. https://www.youtube.com/watch?v=b3nXSFftfG8	No

Sidewalk	If the property has a sidewalk, please enter the square footage of the sidewalk surface. This information may be found in the site survey. If not, then a best estimate may be used. For condos, please adjust this input to account for your ownership interest %. For example, if the sidewalk area is 100 square feet and you own a 5% interest in the common area elements, then this input should be 5 (i.e., 100 square feet x 5% = 5 square feet). Click the link below for more information regarding how to use Google Earth to take measurements of exterior improvements. https://www.youtube.com/watch?v=b3nXSFftfG8	No
Fence	If the property has a fence, please enter the linear footage of the fence length. This information may be found in the site survey. If not, then a best estimate may be used. For condos, please adjust this input to account for your ownership interest %. For example, if the fence is 100 linear feet and you own a 5% interest in the common area elements, then this input should be 5 (i.e., 100 linear feet x 5% = 5 linear feet). Click the link below for more information regarding how to use Google Earth to take measurements of exterior improvements. https://www.youtube.com/watch?v=b3nXSFftfG8	No
Retaining Wall	If the property has a retaining wall, please enter the linear footage of the retaining wall length. This information may be found in the site survey. If not, then a best estimate may be used. For condos, please adjust this input to account for your ownership interest %. For example, if the retaining wall is 100 linear feet and you own a 5% interest in the common area elements, then this input should be 5 (i.e., 100 linear feet x 5% = 5 linear feet). Click the link below for more information regarding how to use Google Earth to take measurements of exterior improvements. https://www.youtube.com/watch?v=b3nXSFftfG8	No