



Fee Request – Allocation

Please either print this form, fill it out, and fax back; or fill out this form electronically and email back.

Client Information

Contact First & Last Name: _____
 Title: _____
 Property Owner: _____
 Address: _____
 City: _____ State: _____ ZIP: _____
 Phone: () - Email: _____

Property Information

Property Name: _____
 Description: _____
 Address: _____
 City: _____ State: _____ ZIP: _____

Purchase/Allocation Information

Date of Purchase: (Include month, day and year) _____
 Total Purchase Price: \$ _____
 Estimated Square Footage: _____
 Minus Land Value: \$ _____ = Building \$ _____

Specify effective federal and state tax rate: _____
 Is this a 1031 Exchange? Yes No
 Was the purchaser a tenant in this building before buying it? Yes No
 Are any of the owners or tenants not for profit? Yes No

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For Office Use Only

Fee:	Life Class	High	Low	Bonus %	Misc. Deprec.
<input type="checkbox"/> Includes Expenses	39	_____	_____	_____	_____
<input type="checkbox"/> Excludes Expenses	15	_____	_____	_____	_____
Tax Year:	7	_____	_____	_____	_____
Look Back:	5	_____	_____	_____	_____
Fed. Tax Rate	Other: _____	_____	_____	_____	_____