Intake Form

Requested Information for each property or business to be analyzed.

1. Ownership (C-Corp, S-Corp, LLC, Partnership, Trust or Individual)
2. Percentage Cost of Sale (Broker Fee, escrow, etc.) ____________________
3. Amount of Depreciation Taken to Date on Real Estate ____________________
4. Sales Price of the Asset. ____________________
5. Amount of Depreciation Taken to Date on Equipment to be sold. ____________________
6. Amount of Mortgages/Debt Balance to be paid off ____________________
7. Amount of Capital Loss Carry-forward Available ____________________
8. Personal Federal Income Tax Rate ____________________
9. Personal State Tax Rate ____________________
10. What is the client's percentage ownership? ____________________
11. Type of Property to be sold ____________________
12. If a business, is this a stock sale or asset sale? ____________________
13. Location Address ____________________
14. Year of Purchase ____________________
15. Original Purchase Price ____________________
16. Dollar Amount Paid for Capital Improvements ____________________
17. Is the Client Married or Single? ____________________
18. Is this a personal residence being sold? ____________________
19. If a personal residence, how long has the owner lived in the property? ______
20. If married, how long has the spouse lived in the property? ____________________
21. Any additional comments:

Send to ken@1LessTax.com or Fax to 888.898.6009

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