



Six Steps to a Cost Segregation Study

Step 1 - REQUEST AN ESTIMATE OF BENEFITS:

Review of owner's depreciation schedule and/or cost basis information to produce a complimentary estimate of benefits which will illustrate your potential cash savings.

Step 2 - EVALUATION:

In conjunction with a building owner's CPA, evaluate the current tax status and future business plans to determine the value/appropriateness of performing a cost segregation study. *RB Engineering, Inc. is a professionally licensed engineering firm and does not give tax advice. RB Engineering advises all commercial property owners to always consult with their certified tax professional.*

Step 3 - ACCEPTANCE OF PROPOSAL:

Once a decision is made to move forward with a cost segregation study, you will receive a proposal and an invoice for 50 % of our fee. Once we receive payment and a signed proposal, a site visit is scheduled by our field engineers.

Step 4 - ENGINEER'S SITE VISIT:

Site visits are performed only by highly qualified and experienced engineers who identify building components and systems and how they are used.

Step 5 - ENGINEERING REVIEW AND CLASSIFICATION:

Following the site visit, the engineer will compile the research and documentation collected into a detailed, comprehensive report. A draft report is then submitted for a final review by an independent CPA.

Step 6 - REVIEW AND ACCEPTANCE OF COST SEGREGATION STUDY:

After the draft report is reviewed by the client and/or their CPA, a printed and bound copy of the cost segregation study will be delivered, along with the final invoice. A spreadsheet for preparation of the 3115 is also made available to the CPA.

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