

FIND OUT IN 90 SECONDS

# Is Your Property a Candidate?

A qualification checklist for property owners evaluating cost segregation for the first time

Most property owners assume cost segregation is only for large commercial investors. It is not. A \$350,000 residential rental qualifies. A \$400,000 office condo qualifies. A \$600,000 short-term rental qualifies. The only question is whether the economics of a study make sense for your specific situation.

Answer the four questions below. If you reach the end with all yes answers, your property qualifies and a Cost Seg America study will likely pay for itself many times over in Year 1 alone.

## QUALIFICATION CHECKLIST

### QUESTION 1 — PROPERTY TYPE

Is the property commercial real estate, a rental investment, or a short-term rental — not your primary residence?

**Yes** → Property type qualifies. Continue to Question 2.

**No** → Primary residences do not qualify. Investment and rental properties of all types do.

### QUESTION 2 — PROPERTY VALUE

Was the property purchased, constructed, or renovated for \$250,000 or more?

**Yes** → Value threshold met. Continue to Question 3.

**No** → Below our minimum threshold. Call us — we will confirm quickly and honestly.

### QUESTION 3 — ACQUISITION TIMING

Was the property acquired anytime since 1987?

**Yes** → Timing qualifies — including properties held for years. Lookback studies recover all missed depreciation. Continue to Question 4.

**Pre-1987** → Special rules apply. Call us to discuss.

### QUESTION 4 — TAX SITUATION

Do you pay federal income taxes and have taxable income the deductions can offset — or do you qualify for a passive activity exception?

**Yes** → Your property fully qualifies. A Cost Seg America study will produce results.

**Uncertain** → Call us. Passive activity rules, short-term rental exceptions, and Real Estate Professional status may still make a study highly valuable.

## SPECIAL HIGH-VALUE SITUATIONS

# These Situations Produce the Largest Returns — Flag Them First

- ★ **Short-term rental (7-day average stay) with material participation.** Deductions apply directly against W-2 income. A physician or professional earning \$300K+ with a qualifying STR can use the full deduction against salary — no Real Estate Professional status required.
- ★ **Property held 1–10 years with no prior cost seg study.** All missed depreciation recovered in one return via Form 3115. Our CPA partner specialist handles the filing. No amended returns. No IRS permission required.
- ★ **Real Estate Professional with material participation.** All deductions apply against any ordinary income with no cap. Highest-value use of cost segregation available.
- ★ **New construction or recent major renovation.** All documentation is current and complete — highest reclassification rates of any study type. 100% bonus depreciation fully restored.

ALL FOUR QUESTIONS — YES?

## Get Your Free Proposal in 24 Hours.

Property type, approximate value, year acquired. We provide a specific estimate of what your study will find, what it will cost, and whether the economics make sense for your situation. **If they don't, we'll tell you directly — before you spend anything.**

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