

ESTATE PLANNING TEAM / REEF POINT, LLC
Request for DST Analysis

Upon completion of this questionnaire, Estate Planning Team will analyze the information and member of Estate Planning Team will contact you to discuss your circumstances. Thank you for giving us the opportunity to help you defer capital gains, if you have any questions, please call - we're here to serve you.

***How did you hear about the DST and have you spoken with another DST Advisor?**

Full Name:		DOB or Age:	
Spouse Name:		DOB or Age:	
Street Address:			
City:		State:	Zip:
Primary Phone:	Alt #:	Email:	

Tell us about the property:

Type of Property (Please Check):

BUSINESS

S-Corp C-Corp LLC Partnership Sole Proprietorship

REAL ESTATE (Please Check):

Rental Residential Rental Commercial Land

Primary Residence 2nd Residence

How is Real Estate Title held?: Single Individual Married Couple Living Trust

Joint w/non-spouse LLC Other

Where is Business or Property Located?:

Additional Notes regarding property or business:

What is your goal "post-sale"? e.g. income? Acquire more investment real estate? Buy or start a business? Need some cash out immediately?

Status of the Property:

Not currently Listed Listed, No Buyer Contract Signed Escrow Opened

Expected Closing Date (if known):

Married: YES NO

Have you lived in this property for at least 2 of the 5 years? YES NO

What is the fair market value or resale value of the property after commissions, fees, etc? \$

Total amount of loans and/or mortgages that will be paid from the sale proceeds? \$

What is the properties basis (*purchase price plus improvements*) before depreciation? \$

What is the total amount of depreciation that has been taken? (if applicable) \$

What was your income for the year of the sale, not including the property sale? \$

Additional Information:

Upon completion of this questionnaire, Estate Planning Team will analyze the Information and a member of our team will contact you to discuss your circumstances. We are committed to protecting your privacy and will never share your information with anyone except those directly Involved In preparing your personal illustration. Thank you for giving us the opportunity to help you defer capital gains. If you have any questions please call us, we're here to serve you.

REQUEST FOR ANALYSIS COMPLETED BY:

ON DATE:

APPT DATE & TIME:

DST ADVISOR: GREG