



**Cost Segregation / Chattel / EPC Act  
Feasibility Study Request**  
Fax Completed Form to 888.833.7649  
or email [amilynne@ruifinancial.com](mailto:amilynne@ruifinancial.com)

**Owner Information**

**Property Information**

Owner's Name: \_\_\_\_\_ Place in Service Date: (mm/yy) \_\_\_\_\_

Entity Name: \_\_\_\_\_ Building Cost Basis: \$ \_\_\_\_\_

Mailing Address: \_\_\_\_\_ Bldg Location: (City/ST) \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_ Please indicate all that apply:

Phone: \_\_\_\_\_ New Construction  Renovation

Email : \_\_\_\_\_ Addition  Retrofit

**Analysis Request Information**

Cost Segregation  Preliminary EPC Act Analysis

Building Type: Retail  Restaurant  Hotel  Lighting / Lighting Controls

Hotel  Multi-family  Office  HVAC

Chattel (Single Family Investment)  Building Envelope

**Full Set of Architectural Plans & Specs  
to include the following:**

- Depreciation Schedule - Prev Tax Year.
- Lighting schedule (wattage / # of bulbs)
- Lighting Plan (bi-level switching details)
- Sheet Index
- Wall Section
- Specifications
- Elevations
- Floor Plans
- HVAC Schedule

**Property Information**

Building Usage: \_\_\_\_\_

Number of Floors: \_\_\_\_\_

Number of Bldgs: \_\_\_\_\_

Bldg Sq Footage (per Bldg) \_\_\_\_\_

**Contact Info of Person Supplying Plans**

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

**Feasibility Study Requested By:**

Date: \_\_\_\_\_

Submitted By: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

If plans do not already include, we will need Mechanical/Plumbing drawings including all equipment & material schedules & specs. Ratings of HVAC such as SEER/EER/IPLV/NPLV/COP ratings (and of these will suffice). Boiler chiller/air handler & condenser manufacturer info, model number, common name & tonnage/BTU's of unit. R values of insulation for roof, walls, & windows for energy calculations & modeling.