

Real Estate Shelter Trust

Analysis Request Form

Property Information & Ownership Section

Property Owner Name _____ Age 1 _____ Age2 _____ Are there Children? _____ Grandkids? _____

Type (e.g. Multi-family, Commercial, Raw Land, Primary Residence, Other) _____

Type of Ownership, If Known (e.g. Partnership, LLC, Outright, S-corp, C-corp) _____

What State is Property Located in? _____

Check Here if there is more than one property, and provide number of properties: _____
If there is more than one property, please provide the property information for each property:

Approximate Current Market Value (Total Asset Value) _____

Approximate Owner's Basis (Depreciated Basis) _____

Approximate Total Property Debt (Balance Sheet Value) _____

What Percentage of the Equity Does Above Owner Own? _____

Are there any partners/co-owners?

If so, how many, and what fractions does each own? _____

Owners Goals Section

Which of the Following are the Property Owner's Goals with respect to the Property?

- Sell and avoid tax on gain
- Reduce market risk of owning the property
- Eliminate the work and/or stress of property ownership/management
- Other (please state): _____

Advisor Information Section

Advisor Firm _____ Advisor (Individual Name) _____

Advisor Email Address _____ Advisor Phone (Office) _____ Advisor Phone (Cell) _____

Please send completed form to Connor Barth at: ConnorBarth@SterlingFoundations.com

Tel: (703) 437-9720

