

The Multifamily Owner's 10-Point Tax & Cash Flow Checklist

Ten quick checks to see whether your portfolio's books and tax strategy are keeping up with your growth — or quietly costing you deductions and clarity.

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| 1 | Cost segregation study completed
Done within a year of acquisition or a major renovation on each property. | ☐ Yes ☐ No |
| 2 | Depreciation schedule kept current
Updated after every improvement, refinance, or disposition. | ☐ Yes ☐ No |
| 3 | Entity structure reviewed
LLC/partnership setup checked for liability protection and tax efficiency across the portfolio. | ☐ Yes ☐ No |
| 4 | Cash-on-cash return tracked per property
Not just a portfolio-wide blended number. | ☐ Yes ☐ No |
| 5 | NOI, cap rate, and DSCR reported quarterly
So performance issues surface before year-end, not after. | ☐ Yes ☐ No |
| 6 | CapEx clearly separated from OpEx
Misclassifying either one skews both taxes and true profitability. | ☐ Yes ☐ No |
| 7 | 1031 exchange strategy planned in advance
Before a sale decision is made, not scrambled together after. | ☐ Yes ☐ No |
| 8 | Reserve funds tracked separately
Kept apart from day-to-day operating cash for each property. | ☐ Yes ☐ No |
| 9 | LP distributions and K-1s issued on time
If the portfolio includes outside investors or partners. | ☐ Yes ☐ No |
| 10 | Your CPA proactively flags savings
Not just filing the return once a year and moving on. | ☐ Yes ☐ No |

How did you score?

3 or more “No” answers? You're likely leaving deductions unclaimed, or missing the clarity you need to make confident acquisition and disposition decisions. Most investors we meet are surprised by at least three.

Want a second set of eyes on your portfolio?

Atteign works exclusively with small businesses and real estate investors — not as a side practice, but as a specialty. We'll walk through this checklist against your actual numbers on a free 20-minute call and flag anything worth a closer look.

Book your free portfolio review → info@atteign.com | 512-717-4290 | atteign.com