

Ideal for:

Sales Executive, CPAs, Consultants, and Networkers who attend conferences and have access to real estate owners and CPA firms.

OUR SIMPLE, TURNKEY REFERRAL PROCESS

1. You identify and refer eligible clients (or make a quick introduction)
2. We provide a complimentary savings analysis at no cost or obligation
3. Our engineers perform a detailed site/virtual review and prepare the study
4. The referred client receives a comprehensive, fully audit-defensible report
5. The client pays the final balance — you receive your 25% fee

CONTACT:

Walter O'Connell Tax Services, LLC

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Results vary based on property specifics and tax situation.
Not intended as tax, legal, or accounting advice.
Always consult your client's tax professional.

WHAT IS COST SEGREGATION?

Cost segregation is an IRS-approved, engineer-led tax strategy that reclassifies components of commercial and investment real estate (lighting, plumbing, flooring, HVAC, landscaping, specialized equipment, etc.) into shorter depreciation lives — 5, 7, or 15 years instead of the standard 27.5 or 39 years. When combined with current bonus depreciation rules, this accelerates massive front-loaded deductions, dramatically improving client cash flow with no change in total depreciation over the asset's life.



Walter O'Connell
TAX SERVICES, LLC



COST SEGREGATION PARTNERSHIP OPPORTUNITY

**Earn 25% Referral Fees While
Delivering Massive Tax Savings
to Your Real Estate Clients**

Partner with Walter O'Connell Tax
Services, LLC (WOTS)

WHY WALTER O'CONNELL TAX SERVICES?

- Experienced cost segregation team led by Walter O'Connell & Anson Worrell, Cost Segregation Professionals
- Engineer- and appraiser-led studies for maximum IRS compliance and audit protection
- Proven track record delivering results for Sales Executives and their real estate clients
- Full-service valuation + cost segregation expertise
- Trusted partner focused on win-win outcomes for Sales Executives and their clients

As a Sales Executive, you get 25% Residual Referral Fees:

Referred clients who continue to utilize our cost segregation services will automatically generate a 25% referral fee for you on every completed study.

WHY YOUR CLIENTS BENEFIT (Typical Results)

- Typically 20–60% of the building's depreciable basis reclassified to accelerated categories
- First-year tax savings often 10–30x the cost of the study (10-30x ROI for Client)
- Immediate cash flow for reinvestment, debt reduction, acquisitions, or distributions
- Applies to: new purchases, new construction, renovations, and even prior-year “catch-up” depreciation

REAL-WORLD EXAMPLES

- \$1M commercial property → \$80K–\$200K+ in Year 1 accelerated deductions
- \$2M–\$5M multifamily/hotel/office → \$500K–\$1M+ in Year 1 federal tax savings (at 37% bracket)
- Study cost: typically \$3K–\$15K (ROI pays for itself in months)

IDEAL PROPERTIES

- Multifamily, office, retail, industrial, medical, hospitality, self-storage, warehouses
- Generally \$500K+ depreciable basis
- Properties with depreciable basis under \$500K still deliver a minimum 10x ROI

WHY YOUR FIRM SHOULD PARTNER WITH US (Zero Extra Work)

- 25% referral fee is paid promptly upon full client payment
- No additional workload, no liability, no expertise required — our team handles everything
- Strengthen client relationships and retention by offering a high-ROI tax planning tool
- Position your firm as a proactive, full-service advisor
- Client presentations, and educational webinars available
- Ethical, transparent partnership (Receipts, Proposals, Economical Travel Fees always available)