



Documents Required for Restriction Period Sections

Restriction Period Sections (Risk & Time)

The following list is intended to help you determine the most likely period during which the holder of the subject interest will be restricted from an exit, as well as the interest-holder's risk during that period.

- The age and general health of any principals (general partner, manager) or the other common tenants or other partners in a general partnership, and succession plans
- Management's future plans for the property
- At least a general outline of the history and current status of the property
- Whether any of the owners/partners/cotenants occupy the property
 - If a vacation property, what is the usage program?
 - Does the holder of the subject interest have any right or ability to occupy?
- Any other conditions, facts or circumstances that might affect the property, the operating entity, future distribution of ownership or sale and termination. What would you want to know if you were buying the interest that is being valued?