

4 STEPS TO A SUCCESSFUL 1031 EXCHANGE



Information Provided by: Greg Lehmann | Asset Preservation, Inc.

Exchanger

- Name:
- Phone:
- Email:
- Address:



- 1 Send the below information to your 1031 exchange professional.
- 2 Send the contract(s) of the sale/purchase to your 1031 exchange professional.
- 3 Tell your title company that this is a 1031 and ask them to send the title commitment(s) to your 1031 exchange professional.
- 4 At least a week before closing, confirm that your 1031 exchange professional has received everything and has set up the exchange with their staff and that you have their exchange team's email address.

Property Info

- Address of Property You Are Selling:
- Mortgage Debt:
- Est. Closing Date:
- Sales Price:
- How Long You Have Owned It:

Property Info

- Address of Property You Are Buying:
- Mortgage Debt:
- Est. Closing Date:
- Sales Price:

Seller's Real Estate Agent

- Name:
- Phone:
- Email:
- Address:

Buyer's Real Estate Agent

- Name:
- Phone:
- Email:
- Address:

Closer At Title Company

- Name:
- Phone:
- Email:
- Address:

Closer (if different from the one listed)

- Name:
- Phone:
- Email:
- Address:

Tax Return

- What is the name(s) on the tax return?
- If the property is filed on a personal return, are you married?
- If married, is it community property?
- If community property, what is your spouse's name, if your CPA wants them on the exchange documents?

Property To Be Purchased

- Are you planning on reinvesting all of your equity and replacing all debt?
- Are you planning on selling to or buying from a related party?