

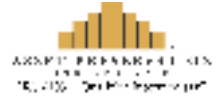
# 4 steps TO A SUCCESSFUL 1031 EXCHANGE



Information Provided by: Greg Lehrmann | 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?