

1031 Exchange Order Form



Please provide information on how we can contact you throughout your exchange. Return the completed form to 1031 CORP. via email to Exchange@1031CORP.com or fax to 610.489.4366 (Collegeville, PA office) or 541.322.9296 (Bend, OR office).

Have you talked with a 1031 CORP. Exchange Team member?

Yes _____ No _____ *If yes, who did you speak with?* _____

Name of individual opening the exchange order: _____

Company (if applicable): _____

Phone: _____

Email (we will keep your email completely private): _____

Secondary/Spouse Email (if applicable): _____

Taxpayer Name (Taxpayer completing 1031 Exchange) _____

Type of Taxpayer: _____ Individual _____ Married Couple _____ Partnership
_____ Trust _____ Corporation _____ Limited Liability Company

Taxpayer Mailing Address: _____

City: _____ State: _____ Zip Code: _____

Address of Property Being Sold (relinquished property): _____

City: _____ State: _____ Zip Code: _____

Estimated Closing Date: _____ Sale Price: _____

Settlement Agent/Escrow Name: _____

Settlement Agent/Escrow Phone: _____

Are you a foreign person defined as a nonresident alien individual, foreign corporation, foreign partnership, trust, or foreign estate? Yes _____ No _____

Are you a resident alien individual? _____ Yes _____ No

To maximize your tax-deferral, you must acquire replacement property of equal or greater value and equity. A trade down in value or equity will result in a taxable event. Do you intend to exclude any funds from your exchange and pay tax on this amount? _____ Yes _____ No *If yes, amount?* \$ _____

Have you discussed the exchange with your tax advisor? _____ Yes _____ No

Have you discussed the exchange with your legal advisor? _____ Yes _____ No

How did you hear about 1031 CORP.?

Please give us the opportunity to thank the person who referred you to 1031 CORP.

Name: _____

Company (if applicable): _____

Address: _____

City, State, Zip: _____

Email: _____

RELEASE OF YOUR 1031 EXCHANGE FUNDS:

Once the funds are deposited into your exchange account, there are only certain times funds can be released.

1. For the acquisition of identified replacement property and routine closing costs;
2. After the expiration of the 45-Day Identification Period if no property has been identified;
3. After the expiration of the 45-Day Identification Period and purchase of replacement property if no additional property has been identified; or
4. After the expiration of the 180-Day Exchange Period.

ADVISORY: Your Exchanger Officer can only provide general information regarding 1031 exchanges. You should discuss your particular situation with a tax and/or legal advisor familiar with 1031 exchanges. By submitting this 1031 CORP. Order Form, I/we authorize 1031 CORP. to initiate a 1031 exchange on my/our behalf. 1031 CORP. should prepare all necessary documentation and open an exchange account. I/we agree to pay a \$250 cancellation fee if I/we elect to not proceed with the exchange after documents are prepared and before closing of your first relinquished property.

Signature: _____

Name: _____ Date: _____