

# 1031 EXCHANGE →



## EXCHANGER

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

Information Provided by  
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Asset Preservation, Inc.

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 AT TITLE COMPANY

- 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?

## CLOSER AT TITLE COMPANY

- 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?