

1031 TAX ADVISORS, LLC

CLIENT WORKSHEET

You are under no obligation until such time as you are contacted by us and a signed contract is subsequently executed.

EXCHANGER INFORMATION:

Your Name: _____
Address: _____
City _____ State _____ Zip: _____
Work Phone: _____ (including area code)
Home Phone: _____ (including area code)
Fax Number: _____ (including area code)
E-Mail: _____
SSN/TIN: _____
Additional SSN# / TIN# _____

PROPERTY INFORMATION:

Title Owner of Property: _____
Address: _____
City _____ State _____ Zip: _____
Buyer Name: _____
Closing Date: _____
Sales Price: \$ _____
Estimated Net Proceeds: \$ _____
Property Type:
 investment home
 investment condo
 multifamily
 commercial
 raw land
 other _____

SETTLEMENT / ESCROW AGENT INFORMATION:

Name of Agent: _____
Phone: _____ (including area code)
File Number: _____

Comments:

ADDITIONAL QUESTIONS:

Did you speak with a 1031 Tax Advisors, LLC representative?

Yes - Agent's name (if you know it): _____

No

Are you ready to do an exchange soon?

Yes

No - When are you selling your property? _____

Is the property that you are selling your homestead?

Yes

No

Will you be providing seller financing on the sale of your property?

Yes

No

Is the Seller/Exchanger a non-resident alien or foreign entity?

Yes

No

Was the property held for investment or productive use in a trade or business?

Yes

No

Is the Buyer of the Property related to the Seller/Exchanger?

Yes

No

Does the Property include any significant items that are not traditionally included in the sale or real estate?

Yes

No

When do you plan on purchasing replacement property?

Immediately

1 month

2-3 months

3-6 months

Do you have a replacement property in mind?

Yes

No

Where did you hear about 1031 Tax Advisors?

- Seminar
- Mail Advertisement
- Professional Referral
- From a Friend
- Tradeshow
- Representative
- Internet
- Other

Promo code (if applicable): _____

By completing this form you are not obligating yourself.

If you have any questions or special requirements, please use our contact link on the 1031TaxAdvisors.com website. An Exchange Facilitator will contact you shortly to review your transaction.

Fees for a standard forward exchange are \$500 and billed on the HUD as part of your sale. Closing proceeds will be delivered directly to 1031 Tax Advisors, LLC to be held on your behalf and disbursed at your direction for the purchase of your replacement property, subject to the terms of your exchange agreement.