

Tax Deferred Exchange Checklist

Preliminary Matters

- Taxpayer should consult with tax advisor about exchange
- Contact 1031 Exchange Corporation to notify us you want to proceed with an exchange or discuss a possible exchange

Relinquished Property

- Add contract addendum or reference under special provisions recognizing the exchange with the buyer's consent
- Email or mail the Preliminary Exchange Information form to 1031 Exchange Corporation
- Notify 1031 Exchange Corporation of the property address and the contact information for the closing officer
- Close sale of Relinquished Property

Replacement Property

- Note 45 day date period on your calendar
- Note 180 day closing date on your calendar
- Identify Replacement Property within 45 days of date of closing on Relinquished Property
- Add contract addendum or a reference under special provisions recognizing the exchange with the seller's consent
- Notify 1031 Exchange Corporation of the property address and the contact information for the closing officer
- Close purchase of Replacement Property