



EXCHANGE START-UP FORM

Please print, fill out the following form and fax it to us at (408) 519-5931.

EXCHANGER #1

EXCHANGER #2

Name: _____

Name: _____

Address: _____

Address: _____

Work Phone: _____

Work Phone: _____

Home Phone: _____

Home Phone: _____

Fax Phone: _____

Fax Phone: _____

Social Security #: _____

Social Security SN/TIN # _____

Email: _____

Email: _____

II/ PROPERTY INFORMATION

RELINQUISHED PROPERTY

Property Address _____

Estimated Closing Date: _____ **Contract Price:** _____

Contract Date: _____ **Loan Amount:** _____

Owner Financing if any: _____ **Equity:** _____

III/ BUYER INFORMATION

BUYER(S)

Name: _____ **Name:** _____

Address: _____ **Address:** _____

Work Phone: _____ **Work Phone:** _____

Home Phone: _____ **Home Phone:** _____

IV/ EXCHANGER'S REAL ESTATE BROKER

RE Agent: _____

RE Company: _____

Address: _____

Work Phone: _____

Fax Phone: _____

V/ BUYER'S REAL ESTATE BROKER

Real Estate Agent: _____

Real Estate Company: _____

Address: _____

Work Phone: _____

Fax Phone: _____

VI/ EXCHANGER'S ATTORNEY/ACCOUNTANT/TAX ADVISOR

EXCHANGER'S ATTORNEY

BUYERS'S ATTORNEY

NAME: _____ **NAME:** _____

PHONE: _____ **PHONE:** _____

FAX: _____ **FAX:** _____

VII/ QUESTIONS:

Was the property used as an investment or for business purposes? Yes / No

Description of property. (3 Family apartment building all rentals, single residence rental property, etc)

Will the replacement property be used as an investment or for business purposes? Yes / No

Will the ownership of the replacement property be in the same manner as the property being sold? Yes / No

Current ownership, please circle one. Individual(s) Partnership Trust Corporation LLC LLP

Do you plan to take back any secondary financing? Yes / No

Have you spoken to your financial advisor? Yes / No

Is your broker/agent aware that you want to do an exchange? Yes / No

Have you started looking for replacement property yet? Yes / No

Are you considering purchasing property from a related party? Yes / No

We will be calling you with additional questions and we will need copies of certain documents such as the deed and trust document, if ownership is through a trust.

**THANK YOU.
Equity 1031, LLC
Local (408) 916-5829
Toll Free (866) 679-1031**

Equity 1031, LLC, its officers, or any of its employees or related parties do not provide any legal or tax advice, please consult your tax attorney or accountant for any specific advice.

Equity 1031, LLC

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www.Equity1031.com