

Other Reasons to Consider Tax-Deferred Exchanges

In addition to deferring the capital gain tax, the investor can benefit from a wide range of non-tax related opportunities:

- \$ Reposition assets
- \$ Change property types
- \$ Increase leverage
- \$ Increase depreciation deduction
- \$ Reduce management obligations
- \$ Provide for estate and retirement planning
- \$ Allow for relocation
- \$ Improve cash flow
- \$ Achieve property consolidation or diversification
- \$ Eliminate or create joint ownership
- \$ Defer phantom gain on problem properties
- \$ Construct improvements on property

**1031 Exchange Services, LLC is
a wholly owned subsidiary of
Southern Financial Services of
North Carolina, Inc.**

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1031 Exchange

***Wealth Building
for the
Savvy Real Estate Investor***



Why Should I Choose

**1031 Exchange
Services, LLC**

***As My Qualified
Intermediary?***

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Role of 1031 Exchange Services, LLC

As a real estate professional, we know you are always alert for opportunities to help your clients build assets and maximize their real property investment potential, not to mention your interest in utilizing tools that will maximize your opportunity to make sales. A 1031 exchange is an excellent tool for real property investors to trade properties and build asset value on a tax-deferred basis. **1031 Exchange Services, LLC**, a full service provider of qualified intermediary services, will assist your client in maximizing their investment.

A 1031 tax-deferred exchange, offers investors one of the last great opportunities to build wealth and save taxes. With the help of a qualified intermediary the investor can dispose of their investment property, acquire a replacement investment property, and defer the capital gains tax that would ordinarily be paid, thus leveraging all of their equity into the replacement property.

The services of a Qualified Intermediary are required by the IRC code. It is important to deal with a seasoned professional who fully understands the exchange procedures that must be followed. **1031 Exchange Services, LLC** can provide a vast array of options so that the investor has access to the full benefits of a tax-deferred exchange.

Our experienced and knowledgeable staff is available for consultation at no charge to determine if a 1031 Exchange is the proper money saving tool for you and/or your clients.

Our Services

1031 Exchange Services, LLC will provide the following key elements necessary to facilitate and complete the exchange process:

- \$ Determine if the property qualifies for a tax-deferred exchange.
- \$ Balance the equities between the relinquished property and the replacement property.
- \$ Calculate the amount of exchange expenses.
- \$ Determine the estimated amount of cash to be received from the sale of the relinquished property.
- \$ Prepare the Exchange Agreement.
- \$ Prepare the necessary documents to convey relinquished property from the exchangor to buyer.
- \$ Provide a safe-harbor for funds to prevent the tax payer from violating the "access to funds rules."
- \$ Prepare letter regarding timing and identification of replacement property.
- \$ Prepare the necessary documents to convey the replacement property from seller to the buyer.
- \$ Assist with preparation of Form 8824, which is required by the IRS when the client files their tax return.



Our Commitment

1031 Exchange Services, LLC understands the client's need for the best possible service available when entering into a tax-deferred exchange. The exchangor will feel confident that we possess the required expertise, skill and commitment to provide quality service. Clients will be comfortable knowing that the exchange funds will be safe and available for the successful completion of the exchange. We have the necessary technical skills as well as practical experience in the exchange process. We are a bonded company with an experienced and knowledgeable staff.

1031 Exchange Services, LLC can tailor a tax-deferred exchange to meet the special needs of the client via:

- Simultaneous Exchanges;
- Delayed Exchanges;
- Construction (Improvements) Exchanges;
- Reverse Exchanges;
- Multi-property Exchanges.

