

INDEPENDENT TRUSTEES, Inc.
1031 EXCHANGE INFORMATION FORM

To begin processing your 1031 Exchange, please provide the following:

1. **Sales Contract** – A copy of the signed Sales Contract for the property being sold.
2. **1031 Exchange Information Form** – This form completed as much as possible.

Send these items to Buzzy Hofheimer (bhofheimer@bridgetrusttitle.com) or Joann Lehr (jlehr@bridgetrusttitle.com).

Exchanger:	Name: _____ Address: _____ Phone: _____ Email: _____
Exchanger SSN or Tax ID No.:	
Fiscal Year End:	(Check One) <input type="checkbox"/> December 31 (default) <input type="checkbox"/> Other: _____
Property to be Sold:	(Input Address or Attach Legal Description) _____ _____
Date of Sales Contract:	
Settlement Agent for Sale of Relinquished Property:	Company: _____ Contact: _____ Phone: _____ Email: _____
Exchanger's Counsel: (If Applicable)	Name: _____ Phone: _____ Email: _____
Buyer:	Name: _____ Phone: _____ Email: _____
Buyer's Counsel: (If Applicable)	Name: _____ Phone: _____ Email: _____
Type of Exchange:	<input type="checkbox"/> Standard Forward Exchange (one sale of Relinquished property followed by purchase of Replacement property) <input type="checkbox"/> Reverse Exchange (Replacement property is purchased prior to the sale of the Relinquished property). Independent Trustees does not recommend this type of exchange when the expected deferred gain is less than \$500,000.00. <input type="checkbox"/> Build-to-Suit (proceeds from the sale of the Relinquished property are used for improvements to the Replacement property). Independent Trustees does not recommend this type of exchange when the expected deferred gain is less than \$500,000.00. <p>*Note that the type of exchange will determine the cost of the exchange and affect the process. Therefore we must know the type of Exchange before starting.*</p>
How did you hear about us?	