

# 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 Claudia Abbott ([cabbott@bridgetrusttitle.com](mailto:cabbott@bridgetrusttitle.com)). Please call if you have any questions.

<b>Exchanger:</b>	Name: _____ Address: _____ Phone: _____ Email: _____
<b>Exchanger SSN or Tax ID No.:</b>	_____
<b>Fiscal Year End:</b>	(Check One) [ ] December 31 (default) [ ] Other: _____
<b>Property to be Sold:</b>	(Address or Attach Legal Description) _____
<b>Date of Sales Contract:</b>	_____
<b>Settlement Agent for Sale of Relinquished Property</b>	Company: _____ Contact: _____ Phone: _____ Email: _____
<b>Exchanger's Counsel (If Applicable)</b>	Name: _____ Phone: _____ Email: _____
<b>Buyer:</b>	Name: _____ Phone: _____ Email: _____
<b>Buyer's Counsel: (If Applicable)</b>	Name: _____ Phone: _____ Email: _____
<b>Type of Exchange:</b>	<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). <b>Independent Trustees does not recommend this type of exchange when the expected deferred gain is less than \$500,000.00.</b> <input type="checkbox"/> Build-to-Suit (proceeds from the sale of the Relinquished property are used for improvements to the Replacement property). <b>Independent Trustees does not recommend this type of exchange when the expected deferred gain is less than \$500,000.00.</b> <b>*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.*</b>
<b>How did you hear about us?</b>	_____