Required Exchange Information & Documents

The below information and documents will be required in order to get a 1031 Exchange started.

FOR ALL EXCHANGES

Titleholder Information

Name:
Phone:
Address:

Main Contact Name:
Email:

Taxpayer Name (if different from Titleholder):
Taxpayer SSN or EIN:

Relinquished Property(s) Information

Address: City: County: State: Zip:

Address: City: County: State: Zip:

(include extra sheet if needed)

Authorized Signers Information

Name: Phone: Email:

Name: Phone: Email:

Name: Phone: Email:

(include extra sheet if needed)

Closing Information

Closing Agent Company:
Closing Agent Contact Phone:

Closing Date:
Closing Agent Contact Name:
Closing Agent Contact Email:

REQUIRED DOCUMENTS

Sales Contract
Title Commitment

REQUIRED DOCUMENTS SPECIFIC TO ENTITY TYPE

- Individual: No additional documents needed
- Single or Multi-member LLC: Operating Agreement
- Corporation: Corporate Signing Resolution
- Trust: Trust Documents
- Partnership: Partnership Agreement

Birchway 1031 LLC
4807 Rockside Road, Suite 600, Independence, OH 44131
Phone: 234-226-1360 | Fax: 234-226-1261
Email: support@birchway1031.com
www.birchway1031.com

Required Exchange Information & Documents

Things to consider before starting a 1031 Exchange.

1. Qualified Use:
   Is the property held for investment or business?
   Primary residences or personal use properties, such as vacation homes, do not qualify for a 1031 exchange.

2. Like-Kind Property:
   Will you be reinvesting into property that is like-kind?
   Nearly all real estate is like-kind, but a 1031 exchange cannot be used for reinvesting in property for personal use.

3. Same Taxpayer:
   Is the same taxpayer selling the property purchasing the replacement property?
   The same taxpayer must be selling and purchasing the replacement property to qualify for a 1031 exchange.

4. Exchange Timeline:
   Are you able and willing to complete the sale, and then the purchase within 180 days?
   A 1031 Exchange must be completed within 180 calendar days of the date of the Relinquished Property sale closing.

5. Reinvest Equal or Greater:
   Are you willing to reinvest equal or greater than the sales price of property you are selling into the purchase property?
   Any amount/debt taken out or not re-invested is considered Boot and that portion will be taxable.

6. Related Party:
   Are the seller and buyer related?
   If so, eligibility requires special attention in order to qualify for a 1031 Exchange.

Always, Always, Always consult with their CPA/Tax Advisor.

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