

Why is our Due Diligence Process Ranked #1?



For 25 years, our due diligence community of top-tier CPAs, attorneys, CIOs, and IT experts has evaluated the best cost-saving and risk-mitigation solutions. We have 100s of client references and have saved clients \$3.5 Billion.

The vetted solutions that pass our 8-step due diligence process provide unique compelling value to 1031 QIs and their clients.

How does a 1031 QI client benefit?

We collaborate in a win/win/win with top 1031 QIs and provide vetted compelling solutions to your clients at no initial cost or obligation.

The 6 Client Steps to Approve Vetted Solutions



1. Assess Client's Suitability: The 1031 QI books [a 15-minute call](#) with us, and collectively we determine which cost-saving or risk-mitigation solutions are most appropriate.

2. Introduce your Client to our Team: The 1031 QI introduces our team of experts to your client on a Zoom or phone call. We provide a brief overview of our services and seek permission to educate the client's advisors (CPA, attorney, IT and HR) on the solutions the client is interested in without any cost or obligation.

3. We Educate Client's Advisors and Staff: Our experts educate the prospective clients' advisors or staff at our expense.

4. Client Provides Relevant Data: The client/advisor shares operational data for scenario analysis and value quantification.

5. We Customize Solutions: We specialize in developing customized solutions for business owners that can help them double their profitability.

6. Clients and Advisors Decide: Your client-advisor team can make better decisions with relevant information on the best solutions.

The TaxFoundation.org published a PDF verifying that the Democrat party in 2020 adopted a platform to increase federal long-term capital gains taxes to 39.6% and also eliminate the step-up in basis. [You can download this PDF by clicking here and please go to page 2.](#)

During the Obama and Biden administrations, multiple attempts were made to reduce the tax deferral capability of a 1031 to \$1 million. After 2024, today's status quo may change.