



**QUALIFIED INTERMEDIARY ENGAGEMENT
INFORMATION & ACCEPTANCE**

Exchanger: _____
 [Taxpayer - Property Owner completing the 1031 exchange]

Taxpayer Type: Individual Married Couple Trust Limited Liability Company

State & Date of Entity Formation

Tele/Cell: _____

Email : _____

Address : _____
 (Primary Residence or Mailing Address) – Not the property to be exchanged

- | | | |
|--|------------|-----------|
| Do you plan to sell more than one relinquished property? | Yes | No |
| Is the property you plan to sell already under contract? | Yes | No |
| Do you have replacement property already identified? | Yes | No |
| Is the property you plan to buy already under contract? | Yes | No |
| Do you plan to purchase more than one replacement property? | Yes | No |
| Do you plan to add or remove parties from the title? | Yes | No |
| Do plan to buy or sell from related parties (family)? | Yes | No |
| Have you discussed the 1031 exchange with your tax advisor? | Yes | No |
| Have you discussed the 1031 exchange with your legal advisor? | Yes | No |

Relinquished Property Address: _____

Expected Date & Price of Closing Relinquished Property: _____ [sell] _____

Closing Office & Settlement Agent: _____

If known:

Replacement Property Address: _____

Expected Date & Price of Closing Replacement Property: _____ [buy] _____

Closing Office & Settlement Agent: _____

I attest that the above answers are true to the best of my knowledge.

Date: _____