

Lawyers Equity Exchange

PO Box 14159

San Francisco, CA 94114

Phone: (415) 701-1234 ♦ Fax: (415) 701-1236

lawyers@lex1031.com ♦ www.lex1031.com

1031 EXCHANGE START FORM

To initiate your exchange transmit the following to LEX

FAX: (415) 701-1236 Attn: Brian Fogarty

Items 1 - 8 pertain to initiating the exchange
Submit Item 9 when replacement property info is known

1. Exchanger's Personal Information

Exchanger's Name(s):			
Address:			
City:	State:	Zip:	
Tax ID / SS No(s):	Exchanger 1. _____ Exchanger 2. _____ <i>for security purposes we can collect these by phone</i>		
Exchanger's Phone:	Exchanger's Fax:		
Exchanger's Cell Phone:	Email:		

2. Address of Each Property Being Sold (Old Property)

Property 1 Address:			
Property 1 City:	Property 1 State:		
Property 2 Address:			
Property 2 City:	Property 2 State:		

3. Real Estate Agent Information

Name:			
Phone:	Fax:		
Email:			

4. Contract Information

Selling Price of Old Property 1: \$ _____	Contract Date: _____
Name(s) of Old Property 1 Buyer:	
Projected Closing Date:	
Selling Price of Old Property 2: \$ _____	Contract Date: _____
Name(s) of Old Property 2 Buyer:	
Projected Closing Date:	

5. Escrow or Closing Agency where your transaction is being/will be handled

Name:			
Address:			
City:	State:	Zip:	
Phone:	Fax:		
Email:			
Escrow Officer Assigned:	Escrow Number: _____		

6. Accountant or Tax Advisor Information

Name:			
Address:			
City:	State:	Zip:	
Phone:	Fax:		
Email:			

7. Other Exchange Information

a. Will you be transferring or receiving substantial personal property in the exchange? **YES:** __ **NO:** __

If YES, what value has been set for such property?

Value Transferred: \$ _____ Value Received \$ _____

b. Are you giving or receiving any promissory notes, cash or non-like-kind property in this transaction?

YES: __ **NO:** __

If so, describe: _____

8. When available, transmit to LEX the following documents

1. A copy of the Sales Contract for each Old Property
2. A copy of Preliminary Report on each Old Property prepared by Title Company

END OF INITIAL INFORMATION SECTION

TRANSMIT TO LEX TO BEGIN EXCHANGE PROCEDURE

NEXT SECTION FOR REPLACEMENT PROPERTY

Exchanger's Name(s):			
Exchanger's Email:			
9. Replacement Property Information			
Property 1 Address:			
Property 1 City:		Property 1 State:	
Purchase Price of Property 1:	\$ _____	Contract Date:	
Projected Closing Date:			
Property 2 Address:			
Property 2 City:		Property 2 State:	
Purchase Price of Property 2:	\$ _____	Contract Date:	
Projected Closing Date:			
Name(s) of Replacement Property Seller			
Property 1:	Name 1: _____ Name 2: _____		
Property 2:	Name 1: _____ Name 2: _____		
Comments:			
Escrow or Closing Agency Handling Replacement Property Transaction			
Name:			
Address:			
City:		State:	Zip:
Phone:		Fax:	
Email:			
Escrow Officer:		Escrow #:	
Sales Contract and Preliminary Report			
When Available Transmit:	Copies of the <u>Sales Contract and Preliminary Report</u> for each Replacement Property		

♦ END OF FORM – Fax to (415) 701-1236 ♦ lawyers@lex1031.com