



"A Full Service 1031 Tax Solution Specialist"

1031 Exchange Setup Form

Cathy A. Fernandez, President
Jennifer Fruchtnicht, Vice President

Please print or type and complete as much information as possible.

Office use only

How did you hear about us? _____

Exchangor's Information (Seller)

1. Name: _____
(Name(s) under which property is currently held. If company, include contact name.)

2. Address: _____
(Street)

(City) (State) (Zip)

3. Phone: () - () - () - () -
(Work Phone) (Home Phone) (Cell/Other) (Fax)

4. E-Mail: _____ 5. Social Security/Tax Id #: _____

Tax Advisor's Information

6. Name: _____ 7. Firm Name: _____

8. Address: _____
(Street) (City) (State) (Zip)

9. Phone #s: () - () - () -
(Work Phone) (Cell/Other) (Fax)

10. E-Mail: _____ 11. Attorney or CPA: _____

Relinquished Property Information

12. Address or Legal Description: _____

(City) (State) (Zip) (Name of County or Parish)

13. Closing Date: _____ 14. Purchase Price: _____

Closing Agent's Information

15. Name: _____ 16. Firm Name: _____

17. Address: _____
(Street) (City) (State) (Zip)

18. Phone #s: () - () - () -
(Work Phone) (Cell/Other) (Fax)

19. E-Mail : _____

Buyer's Information

20. Name: _____
(Name(s) under which property will be held. If company, include contact name.)

21. Address: _____
(Street)

(City) (State) (Zip)

22. Phone: () - () - () - () - _____
(Work Phone) (Home Phone) (Cell/Other) (Fax)

23. E-Mail: _____

Real Estate Agents*Listing Agent (Exchangor's Agent)*

24. Name: _____ 25. Firm Name: _____

26. Address: _____
(Street) (City) (State) (Zip)

27. Phone #s: () - () - () - () - _____
(Work Phone) (Home Phone) (Cell/Other) (Fax)

Selling Agent (Buyer's Agent)

28. Name: _____ 29. Firm Name: _____

30. Address: _____
(Street) (City) (State) (Zip)

31. Phone #s () - () - () - () - _____
(Work Phone) (Home Phone) (Cell/Other) (Fax)

32. Name of person that completed this form: _____

33. Number where you can be reached: () - or () - _____

Additional Information or Comments: _____

*Please be sure that the Purchase Agreement has been signed and dated by all parties involved. Once completed, please mail or fax back to Complete Exchange along with the executed Purchase Agreement. These documents must be completed in order to set up the exchange.

Should you have any questions or require assistance in completing this form, please give us a call.