

1031 Exchange Checklist

Initial Consultation & Planning

Activities to be completed before selling the relinquished property and before acquiring the replacement property. Focuses on legal and tax planning.

Date of Initial Consultation

Client Name

Client Investment Goals & Objectives (Related to 1031)

Existing Property Type (Relinquished)

- ☐ Residential
- ☐ Commercial
- ☐ Land
- ☐ Other