



# OPENING A 1031 EXCHANGE ACCOUNT

## Asset Exchange Company

Qualified Intermediary Services

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### Opening an Exchange Account

It is imperative that the 1031 Exchange account is opened before the close of escrow (COE) on the property being sold. Opening a 1031 Exchange Account is simple and can be done at any point during the escrow process. To open the account, Asset Exchange Company will need the following information:

#### Client Information

Client Name (as on title): \_\_\_\_\_

Client Mailing Address: \_\_\_\_\_

Client Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

#### Property Information (Property being sold)

Address of Property: \_\_\_\_\_

Est. Close of Escrow Date: \_\_\_\_\_

% Owned by Client: \_\_\_\_\_ Sales Price: \_\_\_\_\_

#### Escrow Information

Escrow Company: \_\_\_\_\_

Escrow Officer: \_\_\_\_\_

Escrow Officer Phone #: \_\_\_\_\_ Escrow #: \_\_\_\_\_

#### Real Estate Agent Information (if available)

Real Estate Agent Name: \_\_\_\_\_

Agent Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

THANK YOU FOR YOUR BUSINESS!