

8 Questions. Custom Projections.

Help your clients visualize their 1031 exchange options in minutes

Ask your clients these 8 simple questions and we'll generate customized projections showing their tax exposure, exchange options, and replacement property strategies.

ASK YOUR CLIENTS

1. Current Value
2. Current Loan Principal
3. Original Purchase Price
4. Original Purchase Year
5. Sale Year
6. Marital Status
7. Resident State
8. Income Range

REPORTS WE GENERATE

- **What Happens If You Don't Exchange?**
Clear breakdown of capital gains, depreciation recapture, and total tax liability if your client sells without exchanging.
- **Understanding Property and Debt Choices**
Analysis of how different replacement property values and debt levels affect tax deferral and cash flow.
- **What Happens If I Take Cash Out?**
Projection of tax consequences when clients want to extract equity during the exchange process.
- **Custom Portfolios**
Tailored replacement property recommendations based on your client's goals, risk tolerance, and income needs.

We Handle the Complex Analysis

You gather the answers, we deliver the projections. Give your clients clarity on their 1031 options without the heavy lifting.

100%

1031 FOCUSED

\$10K+

AVG CLIENT SAVINGS

Request a custom projection for your client

Send us the 8 answers and we'll deliver the reports

(424) 277-6011

ExchangeServices@epc1031.com