

EXCHANGE STRATEGIES CORPORATION EXCHANGE OFFICER

Job Summary

The successful candidate for this position is responsible for maintaining our exceptional commitments to service levels and execution excellence in conducting reverse and improvement exchanges for our customers and partners that are in compliance with IRC §1031, IRS Rev. Proc. 2000-37, related tax, real estate, and contract laws, other applicable legal authorities, as well as the standard operating procedures of ExStra.

Essential Duties and Responsibilities

1. Consistently provide superior customer service for ExStra's clients and referral sources. Efficacy and efficiency are of principal importance for professional growth.
2. Strong working knowledge and understanding of 1031 like-kind exchanges of real estate. Often seen issues relate to safe-harbor and NSH reverse and improvement exchanges, seller financing, mixed use property, related party transactions, personal use of investment property, drop & swap structures, refinancing the relinquished and replacement properties, holding period requirement, same taxpayer rule, understanding different business entities, ownership of real estate, and purchase/sale of property.
3. Responsible for timely and accurate preparation of documents, agreements, and correspondence to clients, their agents and advisors, as well as third parties associated with the exchange transaction, including but not limited to closing instructions, deadline reminder letters, other pertinent exchange documentation, and final document packages.
4. Coordinate with closing agents to ensure exchange transactions are handled correctly in accordance with applicable laws and ExStra instructions.
5. Ability to timely and accurately respond to exchange questions as well as requests for information and documentation from clients, their independent tax and legal professionals, and third parties involved in the exchange.
6. Help to resolve questions and challenges that may arise before, during, or after an exchange transaction.
7. Responsible for creating and maintaining electronic files for ExStra on shared, cloud-based systems.
8. Provide technology and marketing input that arises throughout each stage of exchange administration.
9. Keep clients, their advisors and ExStra aware of the status and timeframes of exchange transactions.
10. Ongoing tracking of exchange transactions to manage workflow, priorities, and deadlines.
11. Occasional attendance at industry seminars, sponsored events, and/or training opportunities. Some of which may be held during evening or weekend hours and involve out-of-town or overnight travel.

12. Assist ExStra referral sources as needed on parking transactions.

Knowledge, Skills, and Abilities

1. Strong attention to detail and high-quality work product.
2. Ability to prioritize and work under tight time constraints.
3. Working knowledge of real estate transactions and closing procedures.
4. Ability to learn and grow for purposes of meeting professional objectives.
5. Effective communication in-person, virtually, orally, and in writing.
6. Drive customer loyalty through responsiveness, reliability, and delivery of accurate information.
7. Cooperative engagement with leadership to create, identify, and implement solutions to further effectiveness of ExStra.
8. Demonstrates good judgment and ethics.
9. Keen analytical and reasoning abilities.
10. Highly self-motivated.
11. Sociable and friendly.

Education, Experience, and Licensing

Bachelor's degree or equivalent combination of education and experience (such as Certified Exchange Specialist [CES] designation). Experience in a related field, such as real estate, tax, or title/escrow is helpful but not required.

Technology Used

Dedicated access to the Internet as well as familiarity with Microsoft Office products (such as Word, Outlook, Excel, and PowerPoint), Adobe, DocuSign, OneHub, and customer resource management (CRM) software or cloud-based applications.

Expected Hours of Work and Location

This is a full-time, remote position with 40+ hours of work expected each week.