

Reverse Exchange Worksheet For Real Estate

Exchangor/Taxpayer Information:

Name: _____

Individual(s) Trust

Partnership Corporation State of Formation: _____ Other _____

Contact Person, if not an Individual: _____

Mailing Address: _____

Phone: _____ Email: _____

Replacement Property Information:

Address or Legal Description: _____

County: _____ State: _____ Expected Close Date: _____

Purchase Price: _____ Estimated closing costs: _____

Loan amount: _____ Lender: _____ Interest Only
 Amortizing

Short description of improvements to be made, if any: _____

Estimated value of improvements: _____

Relinquished Property Information:

Address or Legal Description: _____

County: _____ State: _____ Expected Close Date: _____

Estimated amounts, if known:

Expected Sale Price: _____

Mortgage Payoff: _____

Cost Basis: _____

**Reverse Exchange Worksheet
For Real Estate**

Replacement Property Closer Information:

Company Name: _____

Contact Name: _____ File # _____

Phone: _____ Email: _____

Exchangor's Lender Information:

Contact Name: _____

Phone: _____ Email: _____

Exchangor's Advisor Information:

Firm Name: _____

Contact Name: _____ Role: _____

Phone: _____ Email: _____

Relinquished Property Closer Information:

Company Name: _____

Contact Name: _____ File #: _____

Phone: _____ Email: _____