

## **EXCHANGE STRATEGIES CORPORATION EXCHANGE COORDINATOR**

### **Job Summary**

The successful candidate for this position is responsible for providing exceptional customer service and transactional support for ExStra by rapidly and accurately responding to requests from customers, partners, Exchange Officers and other important stakeholders engaged in the process of conducting reverse and improvement exchange transactions 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. Point of contact for document requests from clients, their agents and advisors, as well as third parties associated with the exchange transaction.
2. Handing off new exchanges to appropriate team members.
3. Working with team members and third parties for purposes of obtaining and providing all necessary information and documentation for exchange transactions.
4. Responsible for timely dissemination 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.
5. Responsible for creating and maintaining electronic files for ExStra on shared, cloud-based systems.
6. Provide technology and marketing input that arises throughout each stage of exchange administration.
7. Keep clients, their professionals, and ExStra aware of the status and timeframes of exchange transactions.
8. Ongoing tracking of exchange transactions to manage workflow, priorities, and deadlines.
9. Assist ExStra referral sources as needed with document requests on parking transactions.
10. Contribute to marketing and business development initiatives as requested.
11. Additional tasks or responsibilities as needed by ExStra

### **Knowledge, Skills, and Abilities**

1. Solid administrative skills
2. Strong attention to detail and high-quality work product.

3. Ability to prioritize and work under tight time constraints.
4. Working knowledge of real estate transactions and closing procedures.
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. Demonstrate good judgment and ethics.
9. Highly self-motivated.
10. Sociable and friendly.

### **Education, Experience, and Licensing**

Bachelor's degree or equivalent combination of education and experience. 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 high level of 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.