

## Leasehold Improvement Exchange Worksheet

### Exchangor/Taxpayer Information:

Name: \_\_\_\_\_

Individual(s)  Trust

Partnership  Corporation  Other \_\_\_\_\_

State of formation: \_\_\_\_\_

Authorized / Contact Person: \_\_\_\_\_

Title: \_\_\_\_\_

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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### Affiliate / Titleholder Information:

Individual  Corporation  Partnership  Other \_\_\_\_\_

Name: \_\_\_\_\_ State of formation \_\_\_\_\_

### To-Be-Improved Property Information

Address or Legal Description: \_\_\_\_\_

\_\_\_\_\_

County: \_\_\_\_\_ State: \_\_\_\_\_ Date acquired by Affiliate: \_\_\_\_\_

Brief description of improvements to be made \_\_\_\_\_

\_\_\_\_\_

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: \_\_\_\_\_

Please confirm that the Relinquished Property is NOT currently being used as a primary residence, vacation home, or second home by the Exchangor:  Confirmed

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### **Relinquished Property Escrow / Closer, if known:**

Company Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_ File # \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### **Exchangor's Legal & Tax Advisor, if any:**

Attorney Firm Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Accountant/CPA Firm Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### **Replacement Property Lender, if any:**

Firm Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### **Exchangor's Realtor, if any:**

Firm Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_