

## Deferred Exchange Worksheet for Real Estate

### Exchangor Information:

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

Individual(s)    Trust

Partnership    Corporation   State of Formation: \_\_\_\_\_    Other \_\_\_\_\_

Contact Person, if not an Individual: \_\_\_\_\_

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

Phone: \_\_\_\_\_   Email: \_\_\_\_\_

### Relinquished Property Information:

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

\_\_\_\_\_

County: \_\_\_\_\_   State: \_\_\_\_\_   Expected Close Date: \_\_\_\_\_

Estimated amounts, if known:

Expected Sale Price: \_\_\_\_\_

Mortgage Payoff: \_\_\_\_\_

Cost Basis: \_\_\_\_\_

### Replacement Property Information, if known:

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

\_\_\_\_\_

County: \_\_\_\_\_   State: \_\_\_\_\_   Expected Close Date: \_\_\_\_\_

Purchase Price: \_\_\_\_\_   Estimated closing costs: \_\_\_\_\_

Loan amount: \_\_\_\_\_   Lender: \_\_\_\_\_    Interest Only  
 Amortizing

Seller's Name \_\_\_\_\_

Seller's Relationship to Exchangor    None    Family Member    Affiliate    Other \_\_\_\_\_

Make Improvements during the exchange?  Yes    No   If "yes", briefly describe the improvements

to be made: \_\_\_\_\_

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**Relinquished Property Escrow / Closer:**

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

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

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

**Replacement Property Escrow / Closer, if known:**

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

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

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

**Exchangor's Legal / Tax Advisor, if any:**

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

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

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