



In\$ight

Planning - Investments - Advice

1031 EXCHANGE SUCCESS CHECKLIST

Executing a 1031 exchange successfully takes more than just paper work - it requires strategy, timing, and team coordination. Missing a deadline at any point could mean losing your tax deferral and paying immediate capital gains taxes.

PRE-1031 EXCHANGE PLANNING (BEFORE SELLING YOUR PROPERTY)

- ✓ Engage a Qualified Intermediary (QI)
- ✓ Review tax and financial impacts
- ✓ Line up your investment team
- ✓ Pre-identify potential replacement properties
- ✓ Pre-arrange financing (if needed)
- ✓ Mark the identification deadline
- ✓ Identify replacement property in writing
- ✓ Confirm property viability
- ✓ Use backup properties
- ✓ Stay disciplined
- ✓ Double-check IRS requirements

45-DAY IDENTIFICATION WINDOW (STARTS DAY OF SALE CLOSING)

- ✓ Mark the identification deadline
- ✓ Identify replacement property in writing
- ✓ Confirm property viability
- ✓ Use backup properties
- ✓ Stay disciplined
- ✓ Double-check IRS requirements
- ✓ Mark the final closing deadline
- ✓ Conduct final due diligence
- ✓ Secure final financing (if applicable)
- ✓ Coordinate escrow and closing
- ✓ Monitor closing progress weekly

QUICK TIMELINE SNAPSHOT

Event	Timing
Close Sale of Relinquished Property	Day 0
Identify Replacement Property	By Day 45
Close on Replacement Property	By Day 180