

## 1031 Exchange Relinquished Property Information Worksheet

This worksheet will provide JTC Americas (formerly NES Financial) with the information required to start your exchange. In order to process your request, please complete the following instructions:

1. Answer the fields below that are relevant to your exchange.
2. After clicking "Submit Form" on pg. 2, Adobe will automatically open your email application and create a draft email.
3. Please send the completed form to Justin Amos via email at [justin.amos@jtcgroup.com](mailto:justin.amos@jtcgroup.com), or via fax to 781-982-9558. We also recommended that you download a copy of this worksheet for your own records, thank you!

### Exchanger Information

The Exchanger is an individual taxpayer

The Exchanger is an entity

First Name(s): \_\_\_\_\_

Last Name(s): \_\_\_\_\_

Taxpayer(s) SSN: \_\_\_\_\_

*If Exchanger is an entity, please fill out below:*

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

State of Formation: \_\_\_\_\_

TIN: \_\_\_\_\_

Titleholder (if different from above): \_\_\_\_\_

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

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

Fax: \_\_\_\_\_

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

Mailing City: \_\_\_\_\_ Mailing State: \_\_\_\_\_ Mailing Zip/Postal Code: \_\_\_\_\_

If you need assistance filling out this form or have any other questions, please call us at 1 888 992 1031.

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If contact person is someone other than the Taxpayer or a Representative for the entity, please fill out below:

Contact First Name: \_\_\_\_\_  
Contact Last Name: \_\_\_\_\_  
Contact Title (Or Relationship to Taxpayer/Entity): \_\_\_\_\_  
Contact Phone: \_\_\_\_\_ Contact Email: \_\_\_\_\_

### Relinquished Property Information

Property Address: \_\_\_\_\_  
Property City: \_\_\_\_\_ Property State: \_\_\_\_\_ Property Zip/Postal Code: \_\_\_\_\_  
Purchaser First Name(s): \_\_\_\_\_  
Purchaser Last Name(s): \_\_\_\_\_  
Entity Name: \_\_\_\_\_  
Sales Price: \_\_\_\_\_ Debt: \_\_\_\_\_  
Is Taxpayer providing seller financing?: (Yes/No) \_\_\_\_\_ If yes, please contact our office for additional documents.  
Approximate amount of proceeds that will be received by JTC Americas: \_\_\_\_\_  
Is this a tenant-in-common interest? Yes/No \_\_\_\_\_ If Yes: \_\_\_\_\_ %  
Closing Date: \_\_\_\_\_

### Closing Information

#### Taxpayer's Closing/Escrow Company Information

Firm Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_  
Agent Name: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

#### Taxpayer's Attorney Information

Firm Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

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