

FOLLOW THE PROCESS

1031 Exchange to Delaware Statutory Trust (DST)

PRE-CLOSING

Make a plan. Start the conversation when you are thinking about selling your investment property.

- Assemble your team. CPA, Qualified Intermediary and Insight.
- Meet with your CPA, understand your potential tax liability.
- Meet with Insight. Begin understanding DST options for your exchange.
- Select a Qualified Intermediary. Connect them with your title company if needed.



CLOSING



Do not take possession of any funds at closing! A check in your hand or your bank account means you can not complete an exchange.

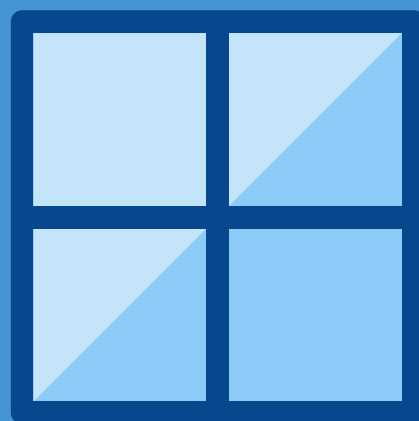
Check your closing statement. Understand what is permissible and non-permissible selling expenses in your exchange. Structure your closing statement (and offer) accordingly.

Once selling is closed, your qualified intermediary will take position of the funds and we can get to work on selecting a DST as your replacement property.

DURING THE EXCHANGE WINDOW

This is your time to focus completely on replacement property options. We will meet with you to discuss all aspects of DST.

- Review approved and available DSTs
- Share our due diligence on each DST and sponsor
- Discuss your liquidity needs. Determine if a partial exchange is needed.
- If needed, complete your 1031 exchange identification form.



CLOSING ON YOUR DST AND WHAT COMES NEXT



Once you decide on a DST(s), the paperwork starts. Our team walks you through every aspect of what you are signing.

Next we will coordinate with sponsors and your qualified intermediary to close on the DST(s).

What comes next? Cash in your mailbox. Sponsors will interact with you providing distributions, reporting, property updates and tax documentation. Insight will always be available to answer any questions post closing.