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Professional 1031 services - Beyond the basics

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Many understand that a Qualified Intermediary acts as a third party to move net proceeds from a taxpayer's sale to their purchase. However some may not realize that IPX1031[®] offers an array of professional services beyond the basics.

Eye on Washington: Think there is no need to exchange? Think again...with the new 2013 tax laws investors will be paying close to 1/3 of their gain in taxes. Section 1031 is more valuable now than ever! We track case law and legislation to give our clients the most up-to-date information available.

Structuring Guidance: We work in conjunction with a client's tax and legal advisors to navigate the specifics of the code, apply it to everyday business scenarios and offer creative tax strategies with proven solutions for building wealth, preserving profits and maximizing investment dollars.

Webinars: Twice monthly IPX1031[®] offers exchange webinars. These courses provide attendees with a strong foundation and working knowledge for use in their day-to-day business.

Education: Local sales and legal staff are guest lecturers for firms, private groups and professional associations and provide accredited courses for CLE, CPE and RE continuing education credits. Those in corporate, estate planning, financial, real estate and tax fields all benefit from the knowledge gained.

Specializing in all exchange types: Delayed (forward) and simultaneous exchanges, reverse and build-to-suit (improvement) parking transactions, multiple asset and personal property exchanges.

Safety & security of funds: A matter of paramount importance - exchange funds are held with IPX1031[®] in segregated accounts under the taxpayer's name and ID number. We offer a written third party corporate performance guarantee, fidelity bond and professional liability insurance. Funds will be safe, secure, and available when needed.

Patricia Flowers is VP for Investment Property Exchange Services, Inc. (IPX1031[®]), Boston, Mass.

IPX1031[®] - Your complete information resource: For over two decades tens of thousands of clients and their advisors have depended upon us to help them realize the benefits of a 1031 Exchange. Let us go to work for you!

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