



**EXETER**

*1031 Exchange Services LLC*

# To Your Continued Success

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## A Strategic Approach

From our perspective, a 1031 tax-deferred exchange is a proven means for creating wealth. Like investing, however, it should not be considered as a one-time, isolated transaction but as part of a well-planned strategy to achieve desired financial and estate planning goals.

With that in mind, we at Exeter focus not only on the details of individual transactions, but on what role they play in achieving financial success for our clients. Let us then view the tax-deferred exchange not as a mere step, but as a strategic journey to success over the long term. It is that view that makes each and every transaction we undertake worthy of our utmost enthusiasm and unflinching determination to get it right.

As an independent Qualified Intermediary for 1031 tax-deferred exchanges, we stake our loyalty only to you, our client, and to your continued success.



## We Start with Your Financial Goals

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### We Have Answers

At Exeter, experience means more than a proven track record. Yes, for more than 20 years our staff has administered thousands of 1031 exchanges throughout the United States, involving every type of exchange and property. But more than that, the people at Exeter are committed to ever-expanding knowledge. As part of our mission, we seek to provide our clients new levels of expertise and efficiency. So our associates are required to attend intensive training programs on the legal, financial and technical elements of 1031 tax-deferred like-kind exchanges. It's one of the ways we cultivate the attitude and the capabilities to produce better performance and desired results.

### Financial Strength

Buttressed by significant Fidelity bond and errors and omissions insurance coverage and equity capitalization, Exeter has leveraged its financial strength to craft a multi-tiered strategy to protect your investment. It starts with the depth of our experience and expertise and is supported by process controls that check and validate each step of every exchange transaction we undertake.

### A Culture of Personal Service

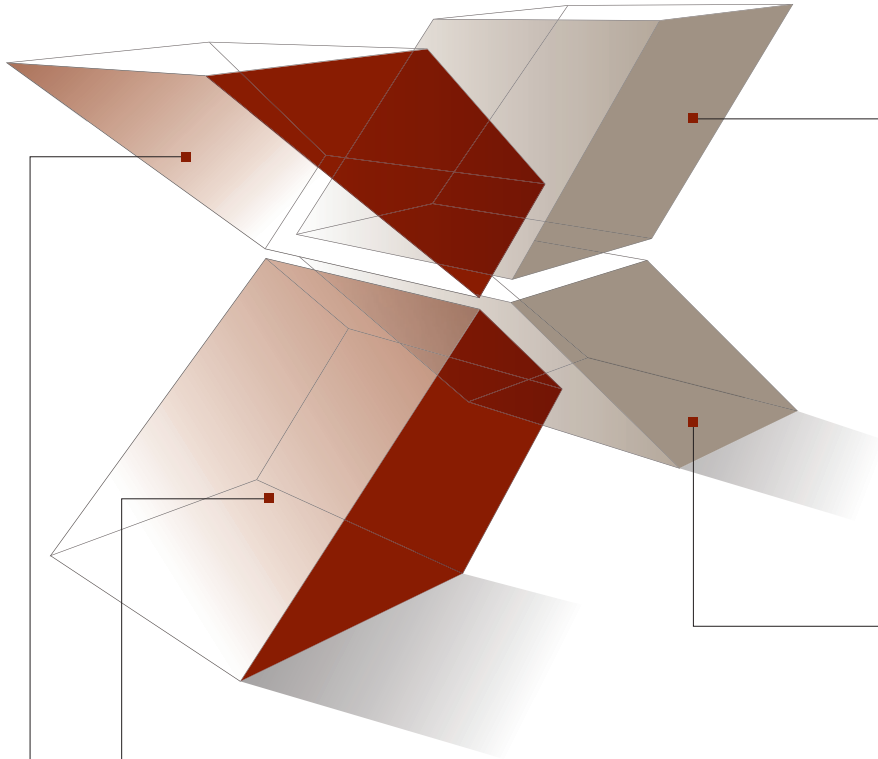
There is no limit to our quest to personalize services as part of our commitment to clients.

They receive a total satisfaction guarantee: a full refund of our exchange fee if not completely satisfied. They receive same-day service for most transactions (some, such as reverse and improvement exchanges, may take longer). They get round-the-clock support, 365 days a year. They have continuous access to our in-house compliance specialists whose job is to help them, not protect us. We provide them advisory services to increase their understanding of all available options.

Exeter does not retreat from transactions that other Qualified Intermediaries might consider exotic or risky; we embrace every challenge and are forthcoming about the chances for success.



# Expect More



## Personal

We consider every exchange a custom solution for our clients. We feel the emotional side of their financial concerns. So we keep their goals in mind and focus on serving them well through every phase of the transaction process.

## Knowledgeable

Our team thrives on improving skills and broadening knowledge. At the forefront of tax-deferred like-kind exchange strategies, we take pride in providing the answers our clients are looking for. We insist that all of our associates be on a continuous educational program to keep up with the ever changing environment of our business.

## Flexible

We leverage decades of experience, applied skills and a “can do” attitude to accommodate our clients. No exchange is too challenging for us to take on. We aim to meet our client’s goals and are always forthcoming about the outlook for success.

## Open

Exeter is independently owned and operated. So, when you sign on as a client, your goals become our primary focus. We owe allegiance to no one but our clients, unlike some Qualified Intermediaries who may be a division or department of a larger organization with cross-sell or up-sell ambitions or quotas. We, therefore, can afford and cherish a culture of open communication without any product or service bias.

## Go ahead, ask.

A 1031 tax-deferred exchange can indeed be complex, and there can be numerous obstacles to a favorable outcome. At Exeter, we tailor 1031 exchange transactions every day for all kinds of properties: commercial, residential, vacant land, even aircraft. Our team brings expertise honed by decades of experience, and continuous training and education, to every transaction. And, as an independent firm, we put your success above any other consideration.



## Our Products

**Exeter I03I Exchange Services, LLC administers all types of tax-deferred exchanges in all 50 states, including exchanges of foreign property.**



### **Forward I03I Exchanges**

Most tax-deferred exchanges are structured as forward or delayed exchange transactions where the investor sells the relinquished property first and subsequently acquires like-kind replacement property.

### **Simultaneous I03I Exchanges**

Forward exchanges can also be structured so that the relinquished and replacement properties close simultaneously or concurrently.

### **Reverse I03I Exchanges**

Reverse tax-deferred exchanges allow investors to acquire their like-kind replacement property first and then subsequently sell their relinquished property. Investors can use either safe-harbor or non-safe-harbor structures.

### **Improvement I03I Exchanges**

Investors can use their I03I exchange funds to acquire like-kind replacement property and then build or improve the replacement property through an improvement exchange (also known as a construction or build-to-suit exchange).

### **Real and Personal Property Exchanges**

Exchanges can be structured for real estate or personal property.

### **Domestic or Foreign Property**

Domestic (U.S.) or non-domestic (foreign) property exchanges can be administered for Investors.

### **I03I Exchange Advisory Services**

Advisory services are available for corporate, institutional or individual Investors when more complex and sophisticated strategies are required.



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