ROSS1031 | EXCHANGE SERVICES

LEARN 1 THING
With Christian Ross

1031 Exchanges

Plan the next investment before you sell.

The one thing to remember

A 1031 exchange can defer gain on qualifying investment or business real estate. Set it up before closing - and do not receive or control the sale proceeds.

The standard exchange timeline

BEFORE CLOSING

Plan the exchange

Engage the exchange team and coordinate documents and disbursement instructions.

WITHIN 45 DAYS

Identify in writing

Identify replacement property in a signed writing delivered to a permitted recipient.

WITHIN 180 DAYS*

Complete the purchase

Close on the identified replacement property; signing a contract is not enough.

*Completion is due by the earlier of 180 days after the sale or your tax-return due date, including extensions. These are calendar-day periods, not six calendar months.

Make the investment work first

Do not buy a poor property simply to avoid a tax bill. Start looking before the sale closes; the 45-day identification period can create pressure when inspections or negotiations fall apart.

Know what needs tax review

Both properties must satisfy the business or investment requirements. Personal residences and property held primarily for resale generally do not qualify. Cash retained, financing, ownership changes, vacation use, or a later move into the property can affect the result. Ask your CPA or tax attorney to review your plan; a two-year holding period alone does not guarantee qualification.

How Ross 1031 helps

We coordinate standard deferred exchanges with your Realtor, closing team, and tax adviser. Our standard fee is $1,500. Discounts are available when working alongside Ross Law and/or Ross Title; ask about pricing and applicable intermediary requirements. Ross 1031 is not currently offering reverse exchanges.

Scan to watch the video

Tax-advice disclaimer Ross 1031, Inc. does not provide tax advice. This handout is for general education only. Consult your own CPA or tax attorney about eligibility, structure, tax consequences, and reporting before proceeding. No particular tax result is guaranteed.

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