

1031 ADVISOR

Serving as Qualified Intermediary to Professional Advisors and their Clients since 1989



Stephen L. Robison, J.D., LL.M.
Strategic Property Exchanges, LLC serves as Qualified Intermediary on Section 1031 Exchanges, including forward, reverse, improvement, personal property exchanges and parking arrangements. Tax opinions are included with all 1031 exchanges.

For more information or advice on potential 1031 contact us at 4500 Cooper Road, Cincinnati, Ohio 45242
Tele 513-412-3483
or email at
steve@robisontaxlaw.com
steve@likeindexchangeservices.com
or visit us at
www.likeindexchangeservices.com

1031 ADVISOR IS FOCUSED ON HELPING YOU DISCOVER, DEVELOP AND IDENTIFY IDEAS TO WIN CLIENTS BY REDUCING THEIR TAXES AND INCREASING THEIR WEALTH.

IS A 1031 RIGHT FOR YOU?

In advising clients regarding whether a Section 1031 Exchanges is appropriate for their individual situation, we consider many factors in our analysis of the client's short term and long term financial planning. One of the things that I believe sets us apart from all other Qualified Intermediaries is the time and expertise that we bring to the table. **Stephen L. Robison, Esq.** is one of 16 attorneys in Ohio who are certified as a Specialist in Federal Tax Law. His expertise includes the areas of income tax planning, capital gain planning, estate tax and asset protection planning, and business entity planning.

Below are some of the questions that you and/or your client may have. We can work with you to assess the client's current assets and financial needs/goals. These factors are integrated into an analysis of the long term goals of the client and his assets.

- What are the current income needs of the client?
- What are the long term capital appreciation needs of the client?
- Would the client be willing for forego income to obtain greater capital appreciation?
- How will a taxable sale impact the client's income and retirement goals?
- Is the client emotionally, physically and financially able to reinvest in more property?
- Does the client have any potential or realized losses that can be utilized?
- What are the possible exit strategies for the client?
- What opportunities are available to the client for reinvestment, including non qualifying replacement property?
- Is it likely that the client will transfer these assets at death to his or her heirs and will the client be subject to estate taxes?
- What planning might be necessary to protect against the loss of the step up in tax basis after 2010?
- What are the risks in investing in syndicated Tenant in Common properties?
- What are the risks in investing in Triple Net Lease properties?
- What are the risks in using the client's IRA's and 401(k)'s to invest in real estate?
- What is the tax impact of placing assets in a Family Limited Partnership before a Section 1031 exchange?
- What is the tax impact of Seller financing in a Section 1031 exchange?

Our *experience, expertise, and skills* complement and enhance your own professional skills in order to provide the best result for the client.

If you have a client that may be considering a sale or purchase of **real estate, business assets, collectible cars, artwork, franchises, coins or bullion, trademarks, patents, or other exchangeable assets**, allow Strategic Property Exchanges, LLC to advise you and guide you and your clients through the exchange process for a less taxing alternative.