



Summary of Member Benefits

SPE^x Alliance is a national 1031 Exchange Company owned by the professional member firms it serves throughout the country. Treasury regulations provide that professionals may provide 1031 exchange services to their clients provided that the professional firm owns a nominal ownership interest in the Exchange Company.

Our 1031 Exchange Alliance allows member firms to enter into a business alliance with Strategic Property Exchanges, L.L.C. to provide 1031 Exchange services to their clients; assisting them in the buying and selling of their business assets by deferring income taxes, increasing their cash flow and promoting growth and profitability.

The Exchange Alliance is 100% owned by its professional members, which allows members to earn profits where their competitor's cannot.

Member Benefits of SPE^x Alliance

1. **Profit increase:** Whether you have one exchange or 100 exchanges, earn 25% on client revenue for each of your clients that engages our exchange services without increasing your overhead, staffing, or risk.
2. **Ability to offer a niche service to gain more clients:** Our professional members can offer branded exchange services to their clients and prospective clients.
3. **No risk to you:** Our member firms are protected from errors or risk in connection to providing exchange services.
4. **Eliminate non-billable time** researching narrow points of tax law.
5. **We do all the work:** You make the call and we do all the work while keeping you informed.

What we do for You and Your Clients

Our experienced Board Certified tax attorneys and exchange professionals perform the following services:

1. Identify and implement the best tax strategy to maximize the cost savings utilizing our 26 years of extensive tax lawyer expertise.
2. Review any and all transaction documents to avoid errors or mistakes in connection with the exchange.
3. Provide audit ready package with tax forms (i.e. documentation and a tax opinion, if requested) that protects the client from IRS penalties and interest thereon.
4. For Exchanges of 100 or more assets, such as equipment:
 - i. Manage the process through our SAAS software without expensive upfront license fees;
 - ii. Monitor and manage exchanges as the transactions occur on a real-time basis;
 - iii. Capture client data electronically on a real-time basis.



- iv. Identify capital assets to be sold and purchased;
- v. Maintain the client's fixed assets; and
- vi. Compute depreciation and provide tax forms, documentation and reports.

All these are provided within a single point of contact in a secure internet portal environment.

Call our Toll-Free Telephone **1.800.427.7212** Stephen L. Robison, JD, LL.M. Taxation, OSBA Federal Taxation Specialist and Certified Exchange Specialist steve@spe1031.com