

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Reminder - Documentation for Section 1031 Like-Kind Exchange

Dear [Client Name],

This is a reminder regarding the tax documentation required for your recent Section 1031 Like-Kind Exchange. To accurately report this transaction on your tax return and ensure compliance with IRS regulations, we need the following documents:

- Settlement statements (HUD-1) for both the relinquished and replacement properties.
- The Exchange Agreement executed with your Qualified Intermediary (QI).
- Assignment agreements for both properties.
- Formal identification notice for the replacement property (sent within the 45-day window).
- Proof of the transfer of funds from the Qualified Intermediary.
- Details of any "boot" received (cash or debt reduction).

Please provide these documents by [Insert Date] so we can complete your tax filings on time. You may send them via our secure portal, email, or mail.

If you have any questions, please contact our office.

Sincerely,

[Your Name]

[Your Company Name]