

# Secure Exchange 1031 Exchange Services

## Who We Are

**Secure Exchange-1031 Exchange Services LLC** is a wholly owned subsidiary of Accruit, one of the nation's largest and most trusted Qualified Intermediaries.

As a boutique, high-touch firm, Secure Exchange specializes in delivering customized 1031 Exchange solutions for real estate investors seeking to defer capital gains taxes and optimize investment strategies.

Backed by a team of seasoned professionals and Certified Exchange Specialists® (CES®), Secure Exchange is committed to providing tailored, compliant, and transparent Qualified Intermediary services. We take pride in aligning our solutions with each client's unique financial objectives—whether you're executing a simple exchange or navigating a complex multi-property transaction.

With the strength of Accruit's national platform and the personalized service of a boutique firm, Secure Exchange is your trusted partner in building wealth through 1031 Exchanges.



### WHY CHOOSE SECURE EXCHANGE?

- ✓ **Seamless and Transparent Transactions:** All exchanges are managed by an experienced in-house team, ensuring smooth coordination, reduced friction, and increased operational efficiency.
- ✓ **Best-in-Class Technology:** Secure Exchange utilizes patented Exchange-Manager ProSM, a best-in-class 1031 Exchange software platform that provides:
  - Real-time updates on transaction timelines
  - Secure tracking of fund availability
  - Full transparency for clients and their advisors
- ✓ **Trusted 1031 Exchange Expertise:** Clients gain direct access to expert subject matter via seasoned professionals, attorneys, and Certified Exchange Specialists® (CES®). This expert guidance ensures each transaction adheres to IRS regulations while optimizing for client-specific outcomes.
- ✓ **Maximum Security of Funds:** Client funds are held in segregated bank accounts and covered by:
  - \$50 million Fidelity Bond
  - \$25 million Errors & Omissions Insurance
  - \$20 million Cyber Liability Insurance
- ✓ **Simple, Transparent, Competitive Pricing**
  - First Relinquished Property: \$900
  - First Replacement Property: \$350
  - Additional Properties: \$350 each

### PARTNER WITH SECURE EXCHANGE-1031 EXCHANGE SERVICES

Experience a higher standard of service, compliance, and confidence in your 1031 Exchange. Our boutique approach means we focus on what matters most: your success.