

# The Voice

## Monthly Newsletter



*The Voice of the 1031 Industry*

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## President's Message

### Jim Miller, Investment Property Exchange Services, Inc. (IPX1031)

This month's message is for the trivia buffs. What is the highest state capital in the United States? If you guessed Denver, you would be incorrect (it is the third highest). The highest state capital in the US will be the location of this year's annual FEA conference, Santa Fe, New Mexico. At about 7,000 feet above sea level, it is nearly 2,000 feet higher than the Mile High City.

Registration for the conference will open the week of July 10, so make sure to save the dates – Sept. 19-21. As usual, our conference planning committee has put together a full agenda of great education, networking, and entertainment.

If you have never been to Santa Fe, this is your opportunity to visit not only the highest but also the oldest state capital in the US. For those that want to “stock up” on more information (trivia), here is a link: <https://www.santafe.org/visiting-santa-fe/>.

I hope to see you in Santa Fe!

## 2023 FEA Annual Conference



Stay tuned! Registration for the 2023 FEA Annual Conference will be opening **NEXT WEEK!** Early bird pricing will end on **August 28**, so register early! Sponsorships are still available. Fill out the form below or click here to fill out the [online form](#).

## Sponsorship Opportunities

### Hotel Information

*Book by August 18th to receive group discount.*

#### [Eldorado Hotel & Spa](#)

309 W San Francisco St., Santa Fe, NM 87501  
Deluxe King or Deluxe Double  
\$279+tax + \$15 amenity fee

[Book Your Room](#)



## Optional Activity

40 mile charity bike ride exploring some of the unique landscape of the Southwest. Bike rentals will be available. If you have interest, please reach out to Brent Abraham – [Brenta@accruit.com](mailto:Brenta@accruit.com) so we can get an idea of a headcount.



## GAC Update: Educating Congress About 1031s.

In 2023, FEA has continued its efforts to educate members of Congress about the economic benefits of Section 1031.

Since President Biden announced in March that his budget proposal would again include a \$500,000 cap on Section 1031, FEA members have participated in more 70 in-person Hill visits, generated more than 600 letters to Congress, and continued to regularly host congressional fundraising events through the FEA 1031 PAC.

So far this year, the PAC has sponsored 14 events with members of Congress. The events are often virtual and allow for FEA members from across the country to participate. During the meetings, participants share data from FEA's economic studies and discuss the benefits of Section 1031 exchanges.

#### Upcoming FEA 1031 PAC fundraisers include:

- Rep. Mike Thompson (D-CA), July 14
- Rep. Lloyd Smucker (R-PA), July 18
- Rep. Beth Van Duyne (R-TX), August 8

If you would like more information on any of the upcoming fundraisers or how to become more involved with GAC activities, please contact Kimberly Steenhoek at [director@1031.org](mailto:director@1031.org).

## Welcome New Members

## Affiliates

### Capview Partners LLC

Dallas, TX

[capviewpartners.com](http://capviewpartners.com)

### Encore Bank

Little Rock, AR

[bankencore.com](http://bankencore.com)

### LinkBank

Camp Hill, PA

[linkbank.com](http://linkbank.com)

### Peapack Gladstone Bank

Teaneck, NJ

[pgbank.com](http://pgbank.com)

### Webster Bank

New York, NY

[websterbank.com](http://websterbank.com)

## Affiliates First

FEA thanks our Affiliate Members for their support of our FEA members and the 1031 exchange industry. In return, FEA members are encouraged to support our Affiliate Members.

[View Members](#)

## Affiliate Spotlights

**EXCHANGE PLANNING**  
CORPORATION

### DSTs 1031 Investments

3141 Michelson Drive Suite 504  
Irvine, CA 92612  
(818) 923-3289

**DSTs 1031**  
Investments

### Exchange Planning Corporation

3625 Del Amo Blvd #380  
Torrance, CA  
Phone: (424) 277-6011  
<https://www.epc1031.com>

At DSTs 1031 Investments, we provide brokerage services tailored to retail investors. Our services include facilitating the buying of private and illiquid securities based on your directives, as well as providing investment recommendations.

As dedicated DST specialists, we have access to a diverse range of DST investment products. We continuously monitor and analyze all the available DST investments in the marketplace and conduct due diligence on the offerings. Our evaluation process encompasses factors such as sponsor experience, past performance, property asset class, investment property details, and risk/reward assessment.

We collaborate with more than 30 firms that offer DST investments covering various asset types. These include multifamily properties, student housing, necessity-based retail, self-storage facilities, and industrial properties. Our

Exchange Planning Corporation is a trusted industry leader providing comprehensive exchange planning services. We built our software from the ground up to empower clients to explore various exchange scenarios and gain valuable insights into the potential tax benefits associated with each option. With our software, clients can make data-driven decisions that align with their financial goals.

We understand the unique challenges faced by real estate investors when it comes to 1031 exchanges. Many tax professionals lack the specialized knowledge required to navigate the complexities of these transactions. That's why our team of experts is dedicated to providing tailored guidance that takes into account each client's specific tax situation and investment objectives.



focus is on ensuring that our clients make informed investments aligned with their specific investment goals and portfolio.

In addition to DSTs, we provide opportunities for private company investments, alternative investments (non-traded debt, private preferred stock, traded and non-traded REITs, funds), and tax-advantaged products (such as Qualified Opportunity Zones, and oil and gas drilling programs). Please note that we do not have custody over customer funds or securities. We always act based on the client's explicit authorization, ensuring that they retain ultimate decision-making authority regarding purchasing or selling securities.

Securities are offered through Cabin Securities, Inc, a member of FINRA/SIPC. Advisory services offered through Cabin Securities, Inc. When investing with our broker-dealer, Cabin Securities Inc, we adhere to Regulation Best Interest, prioritizing your needs over the interests of the firm.

**Contact:** Becky Eriksson [beriksson@cabinsecurities.com](mailto:beriksson@cabinsecurities.com)

Once your clients have completed their exchange, we provide comprehensive reports to both your clients and their tax professionals. These reports enable tax professionals to accurately report our work and ensure compliance with tax regulations. One of the most important reports we provide is our "Tax Savings Report," which estimates the current and future taxes your clients will save from the exchange. This report effectively promotes the benefits of an exchange, providing your clients with a clear understanding of the value they have gained.

Exchange Planning Corporation takes pride in our ability to help clients understand the future tax implications of their exchange decisions. By carefully analyzing each client's unique circumstances, we can provide guidance on optimizing tax savings and minimizing potential tax burdens in the long term.

**Contact:** Ray Simmons [ray@EPC1031.com](mailto:ray@EPC1031.com)

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## FEA 1031 PAC: Upcoming Fundraisers



The FEA 1031 PAC contributes to members of Congress of both political parties and is funded by eligible individual employees.

To become eligible, individuals must be employed by FEA member companies that have filed a Permission to Solicit form. A Permission to Solicit form is required by the Federal Election Commission before FEA can solicit eligible employees of member companies. Member companies are only permitted to grant one trade association permission to solicit their employees per calendar year.

FEA Member Key Contacts can find a Permission to Solicit Form [here](#).

For more information, please contact Kimberly Steenhoek at [director@1031.org](mailto:director@1031.org).

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## Job Postings

Job postings are intended as a service to our members by allowing companies to post employment opportunities for 90 days. Check out these newest job postings here: [https://fea.memberclicks.net/MC\\_career-opportunities](https://fea.memberclicks.net/MC_career-opportunities)

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## Did You Know?

### Did you know...

FEA has a document that the public can use to interview a potential QI for their 1031 exchange? It contains many of the best practices QIs should have in place to raise the confidence of the taxpayer who needs your help. Read all about it at [https://www.1031.org/assets/docs/Choose\\_a\\_QI.pdf](https://www.1031.org/assets/docs/Choose_a_QI.pdf).

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## Message from Executive Director Kimberly Steenhoek



Thank you to everyone who answered the call for FEA board nominations. The nominations committee is currently reviewing the applications and interviewing candidates.

For the upcoming term, FEA has openings for four regular board positions and one affiliate board position. These terms are available when the current board terms expire in September of this year. Regular board members can serve up to two three-year terms and affiliate members can serve one three-year term.

Whether it's service on the board or on a committee, FEA's success depends on members who willingly volunteer their time and talents to help lead the organization. Thank you to all who have served and continue to serve FEA. We appreciate all you do!

**Federation of Exchange Accommodators**

[www.1031.org](http://www.1031.org)

