



ARCHER
Investors



1031 EXCHANGE & DST STRATEGY GUIDE

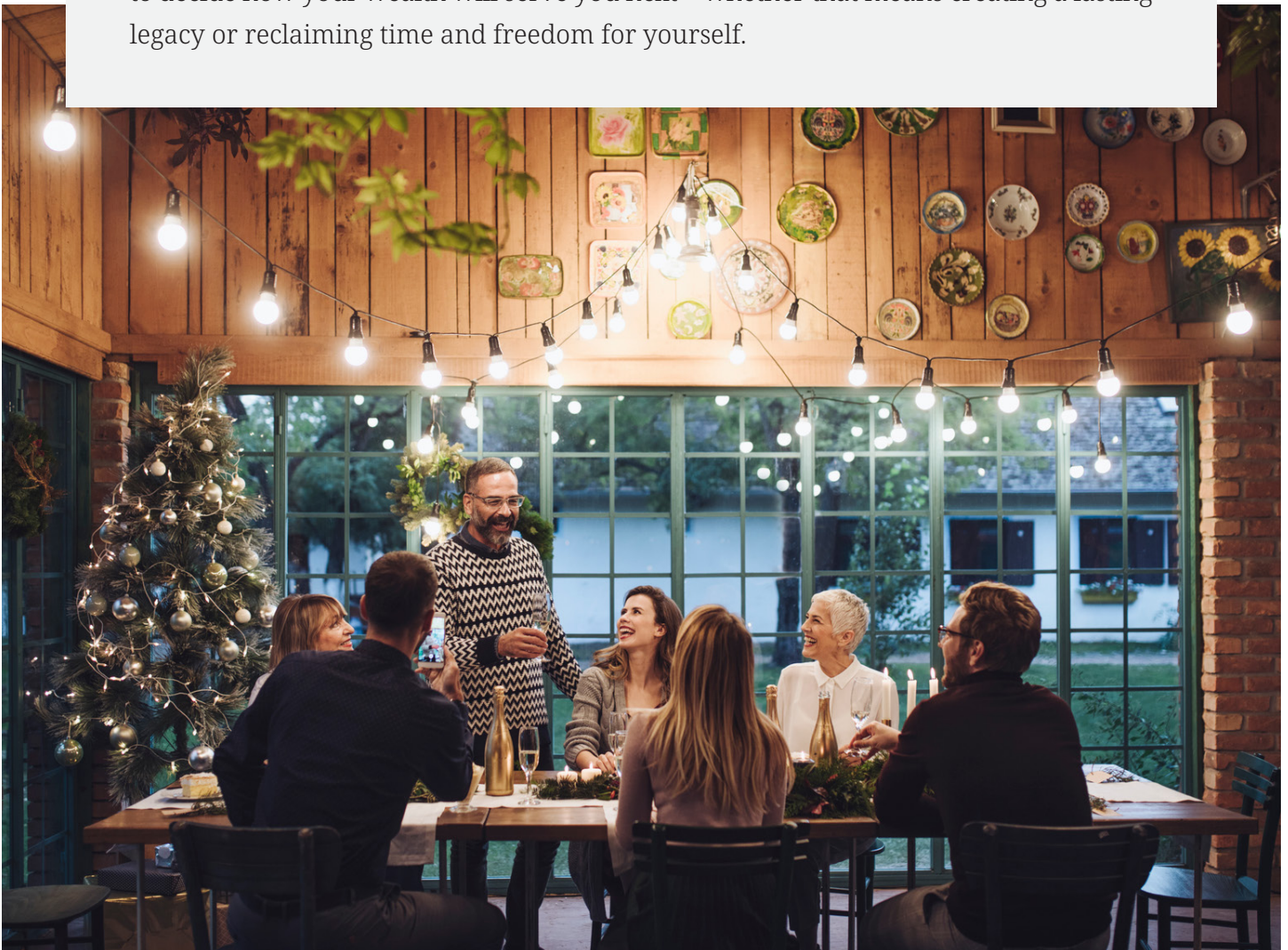
Preserve Your Capital. Protect What Matters Most.

WHAT IS A 1031 EXCHANGE?

A Tax-Deferral Strategy. A Wealth-Preservation Tool.

Selling investment property often means a large tax bill: capital gains and depreciation recapture can reduce your equity by 20–40%. A 1031 exchange allows you to defer those taxes and reinvest 100% of your proceeds into new real estate.

At Archer, we see the 1031 exchange as more than a transaction. It's a pivotal moment to decide how your wealth will serve you next—whether that means creating a lasting legacy or reclaiming time and freedom for yourself.





WHY IT MATTERS

Imagine selling a property for \$1,000,000 with \$800,000 in gains. In a traditional sale, \$240,000–\$320,000 could be lost to taxes before you reinvest. A 1031 exchange keeps the full \$1,000,000 working for you.

For some investors, that difference becomes a bridge to the next generation and a way to ensure what they've built continues to serve their family long after they're gone.

For others, it represents something equally important: the ability to simplify, step away from management headaches, and finally let their wealth serve *them*. After years of active ownership, they are ready for their capital to create stability, ease, and income in the present.

Both paths share a common thread: you've earned the right to decide how your wealth serves the next chapter of your story. A 1031 exchange can help you do that.

HOW A 1031 EXCHANGE WORKS

1. List the Property

Work with your broker as usual. Including intent to exchange in the listing and contract is a best practice.

2. Use a Qualified Intermediary (QI)

Engage a QI before closing. The QI holds sale proceeds to maintain tax deferral.

3. Identify Replacements (45 Days)

Choose new investments that align with your income, growth, and lifestyle goals.

4. Close on Replacements (180 Days)

Direct the QI to fund the acquisitions and complete the exchange.



Archer coordinates timing, strategy, and structure with your QI, CPA, and legal team so the process is seamless.

KEY RULES & DEADLINES



45-Day Rule

Identify replacement properties within 45 days of sale.



180-Day Rule

Complete purchases within 180 days.



Like-Kind Requirement

Any U.S. investment or business-use real property qualifies.



Equal or Greater Value

To fully defer capital gains, you must reinvest 100% of the proceeds and acquire replacement property of equal or greater value—including replacing any debt paid off in the sale.



Title Matching

Ownership entity must remain consistent.

WHERE DSTs FIT IN

For many 1031 exchange investors, Delaware Statutory Trusts (DSTs) are a replacement property option that acts as the bridge between active ownership and fully passive income.

Investing in DST real estate allows you to:

- Own interests in professionally managed, income-producing real estate
- Diversify across multiple markets and asset classes
- Receive fully passive cash flow
- Step away from tenant and management burdens
- Simplify estate planning with easily divisible interests

For those focused on **legacy**, DSTs potentially offer stable, transferable wealth structures. For those focused on **freedom now**, DSTs create income and ease without sacrificing hard-earned equity to taxes.



BENEFITS OF USING DSTs IN A 1031 EXCHANGE

- Continued tax deferral to keep more of what you've built
- Potential for predictable monthly income
- Diversification to reduce single-asset risk
- Estate planning advantages with step-up in basis
- Efficient closings to meet 45/180-day deadlines



THE ARCHER APPROACH

Aligning strategy with what matters most to you

Whether your priority is securing a legacy for the next generation or simplifying life so you can enjoy what you've earned today, Archer designs your 1031 exchange investment strategy to reflect your deeper goals:

- Customized allocation models tailored to your objectives
- Curated DST opportunities that match your income and risk profile
- White-glove coordination from listing through reinvestment
- Ongoing support for you and your family

YOUR CAPITAL. YOUR STORY. YOUR CHOICE.

A 1031 exchange is more than a tax strategy. It's a chance to pause and decide what you want your wealth to do next. Will it create a foundation for those who follow? Or will it give you the freedom to live more fully now?

Whatever you choose, Archer helps you preserve what you've built and direct it with intention.

Your wealth holds your legacy. We help you write its next chapter.

Schedule a Complimentary Consultation

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www.archerinvestors.com



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Disclosure

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